

Discovery call checklist

Discovery calls can be tough, especially for newer reps. Speaking to prospective clients for the first time since they showed interest can be intimidating when a rep isn't experienced in the role. It's not just new reps who will benefit from help with discovery though, of course.

As a sales enablement professional, one of the easiest ways to support reps in their day-to-day work is to make discovery calls easier. And at PMA, we're looking to make your life a little bit easier by providing you with this discovery call checklist.

This checklist will help you and your reps (new and old) nail discovery calls and qualify leads even more effectively.

Step	Explanation
Step 1:	First things first: do not go into the discovery call blind.
Make sure you've done your pre-call prep	<p>It's beyond important that you do your research before picking up the phone. While yes, you're calling in order to <i>discover</i> information about the prospect, that doesn't excuse being clueless.</p> <p>Being informed about the prospect, their organization, and what they do will pay off because you'll be more confident in yourself and come across as more authoritative.</p> <p>If you're not informed, you risk coming across as lazy and disinterested.</p> <p>You don't need to spend hours doing it, but before you pick up the phone try these three things:</p> <ul style="list-style-type: none">- Scan the person you're calling's LinkedIn page- Browse the organization's website, particularly the 'about us' section- Type the organization's name into Google and read the results

It won't take more than 5 minutes but will result in you being better prepared for the call. That will do wonders for your confidence *and* your chances of making it a successful call.

Step 2:

Don't dive straight into it and make it an interrogation!

At the beginning of the call, don't immediately bombard the prospect with question after question. That will only serve to confuse, fluster, and annoy them.

Instead, lay out the purpose of your call clearly and simply. This way, the prospect knows exactly what to expect from you. It also allows you to introduce yourself right off the bat, so you don't seem like a stranger.

As the purpose of your call is essentially the same every time, a *script* can give you confidence and provide a familiar, safe introduction to each call.

Try something like:

"Hi prospect! My name is Joe Bloggs from ABC company. The purpose of this call is for us to get to know your organization a little bit and find out if we'd be a good fit."

That's just an example, but if you state your agenda clearly and with confidence, and establish the terms of the call right away, you're more likely to have an engaged prospect.

Step 3:

Ask the right questions (ones that spark two-way conversation)

Prepare a list of general questions beforehand, based on the information you need to acquire. However, don't be afraid to ask an off-the-cuff question if you hear an interesting response.

You should do this for three reasons:

- It shows the prospect you're listening
- It shows the prospect you're not *just* reading questions from a list
- It triggers a two-way conversation

The first two are great reasons themselves and would've been worthy steps on this checklist themselves.

The third point, though, is vital to building rapport.

If you can promote an engaging, two-way conversation between you and the prospect, then you'll get all the information

you need while the prospect is left feeling like they had a positive conversation rather than an interview or worse, an interrogation.

That can only be a good thing in a field where it's tricky to be remembered in a positive light.

Step 4:

Don't forget your ultimate goal of moving to the next stage

If the prospect ticks all the right boxes, and the conversation has been flowing, that's great. But you know what's really great? Getting the prospect to agree to a second call or demo.

If you truly feel like working together is going to be beneficial, then that's the next step.

Steps 2 and 3 are all about building the trust and rapport that will lead to the payoff here, in step 4.

Start by painting your product/service in a positive light. Demonstrate how you've helped other businesses in similar situations. Then, with confidence, ask for the follow-up:

"Prospect, based on what we've discussed and your challenges in X, this is an area I really think we can help you with. When can we book some time to look into that in more detail?"

Again, that's an example but note two things:

- It's confident and brave
- It reaffirms to the prospect that you've built trust, you've discussed challenges, and *you* can help with those issues

Phrase it in a way that works for you, but remember those key points.

Step 5:

Evaluate every discovery call, and improve on your mistakes

You can always learn from your discovery calls, so make sure you record every single one. This allows your sales enablement team to key in on areas to focus on when coaching, but it also allows you to look back at how you did.

Did you click particularly well with a prospect and build rapport well? See what you can learn from that conversation! Did you lack confidence and fail to book another call with a client who had potential? Look back and see where you could've rephrased things to come across better.

There is so much to learn every time you pick up the phone, don't let the learning stop as soon as the call does. Every conversation, whether it's 5 minutes or 30 minutes, contains lessons that'll make you a better salesperson.

Make sure you approach coaching opportunities with a positive attitude.
