

## Step 1: Pre-Call Research/Point-of-View Building Prompt (do this before the discovery call):

*I am a sales rep at [company]. I have an upcoming conversation with the [prospect title] at [prospect company]. I want to come prepared with a point of view. The point of view should include:*

*Company Focus Areas*

*Team Focus Areas*

*The company focus areas and team focus areas should be related. The team focus areas should support the company focus areas. Each company focus area should tie back to a team focus area and vice versa. All focus areas should be based on recent news about the prospect's company. All focus areas should also be related to the value proposition of my company. Conduct sufficient research of my company and the prospect's company to ensure the point of view is specific and relevant. Return three bullet points for each focus area.*

## Step 2: Add point-of-view to template to share with prospect on call

[Example template to share point-of-view/research here](#)

## Step 3: Fill out Discovery “Capture Sheet” on call (below):

### 1. Buyer Priorities

“What did I get wrong or miss from my research?”

“How would you stack rank these?”

- **Top 1–2 Priorities (in buyer’s words):**
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- **Supporting Notes (context, team ownership, timing, etc.):**
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### 2. Current State (Tied to Priority)

“How are you addressing this today?”

“Can you walk me through your process?”

- **Process Overview:**
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  - **Tools/Teams Involved:**
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  - **Additional Context (friction, gaps, manual steps):**
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### 3. Blockers

“Where are you seeing the most friction?”

“Where do you get stuck?”

- **Stated Challenges:**
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  - **Root Cause Insights (if uncovered):**
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### 4. Negative Consequences

“You mentioned [blocker] — have you measured the impact on [priority]?”

“Who else is impacted by this?”

- **Business Impact:**
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- **Cross-functional Impact:**
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- If unresolved, what's at risk?:

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## 5. Desired “After State”

“If [blocker] was eliminated, what would your process look like?”

“What operational changes would be required to reach that goal?”

- Ideal Process (in buyer's words):

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- What they care about improving (speed, visibility, automation, etc.):

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- How they define “better”:

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## 6. Positive Business Outcomes

“How would you know you've successfully reached that future state?”

“What would success look like for your team?”

- How success will be measured (specific or general):

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- Strategic business goals tied to this initiative:

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## 7. Key Buyer Quotes (For Follow-Up / Proposal)

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## **8. Gaps, Risks, & Next Steps**

- **Knowledge gaps (need more info?):**
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- **Deal risks (e.g. low urgency, low stakeholder buy-in):**
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- **Agreed next steps / mutual plan start:**
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