

Discovery Call Agenda Templates (PDF Format)

1. B2B SaaS Discovery Call Template

Call Duration: 25 minutes

Use Case: For SaaS companies selling to SMBs or mid-market clients

Agenda Breakdown:

1. Intro & Rapport Building (2 mins)

Start with a friendly tone. Reference something from LinkedIn or previous convos. Make it human.

2. Set Agenda (1 min)

"Here's what we'll cover today: a quick intro, learn more about your current setup and goals, explore challenges, and see if there's a fit. Sound good?"

3. Company Background & Goals (5 mins)

"Can you tell me about your team and what you're working toward this year?"

4. Pain Point Exploration (7 mins)

"What challenges are slowing things down right now?"

"How are those impacting your workflow or growth?"

5. Toolset & Process (5 mins)

"What tools are you using today to solve this?"

"What does your current process look like?"

6. Next Steps & Alignment (5 mins)

"Would it make sense to schedule a follow-up to go deeper or bring in other stakeholders?"

2. Enterprise Sales Discovery Call Template

Call Duration: 45–60 minutes

Use Case: For reps working on high-ticket, multi-department deals

Agenda Breakdown:

1. Stakeholder Mapping

"Who else is involved in the decision-making process?"

2. Procurement Process

"What does your typical buying process look like for tools like ours?"

3. Competitive Evaluation

"Are you evaluating any other vendors currently?"

4. Custom KPIs & ROI Drivers

"What would success look like six months from now if we worked together?"

5. Timeline & Budget Check

"Is there a set timeline or fiscal window we need to consider?"

6. Technical Fit & Integration Needs

"Do you need us to integrate with existing systems or data

flows?" **3. Service-Based Business Discovery Call Template**

Call Duration: 30–45 minutes

Use Case: For agencies, consultants, or service providers

Agenda Breakdown:

1. Business Model Review

"Can you walk me through your business model and target customers?"

2. Goals & Constraints

"What are your goals for this quarter or year? What's holding you back?"

3. Budget & Timeline

"Do you have a set budget or ideal launch date in mind?"

4. Pain Points & Expectations

"Have you worked with providers like us before? What worked? What didn't?"

5. Fit Assessment

"Based on what we've discussed, I believe we can help with X. Would you like to explore a proposal or roadmap next?"