

## Discovery Call Script Template

This is from The O.C.G.C. Model which outlines the 13 Essential steps to call success that can [increase close rates by as much as 52%](#). If you want more in depth information on how I grade sales calls or some help creating a rock solid sales script that guides prospects through in depth discovery without feeling salesy, send me a message to [s@stephensteers.com](mailto:s@stephensteers.com) and we can connect!

Happy Selling!

- Stephen

## 13 Steps to Call success

If these 13 features are present in a call you'll drive the call to a logical and actionable conclusion

1. [The Prospect Prologue - Pre Meeting Research Template](#)
2. Agenda
3. Why now?
4. Storytelling
5. Where do you want to go?
6. Where are you now?
7. What's in the way?
8. Supplemental Questions
9. Summarize
10. Storytelling
11. Offer
12. BAMFAM if a fit
13. Post Call Expectations

Every sales call has its own nuances but no call is more important than the discovery call. The discovery call sets the tone for the entire sale. It's the lobby for your business. Is the prospect properly qualified or are we gonna have to chase them down?

Intended outcome: Qualify quickly and establish urgency.

**The O.C.G.C. Model: Opening→ Creating the gap→ Closing**

- **Opening** = Building trust by setting expectations, creating the space for discovery, taking control of the call.
- **Creating the Gap** = Uncovering the pain and specific needs of the prospect, storytelling and establishing their urgency for solving said problem.
- **Closing** = Summarizing the discovery, teasing the solution, booking next steps

# 1 - Opening

## Rapport building

Mention research you've done, form you've filled out.

- **\*Bookend to keep the call to time\***

I have another call right after this, so is it cool to keep to time?

- **\*Wait for confirmation\***

Cool. So, the goal of the call is simple, I want to learn about more about you and what you're working on, share a bit about us and what we're building, and if there is room for us to chat further about working together based on anything we discuss today we'll lock in some time for that.

Sound good?

**\*wait for confirmation\***

Great.

Quick question before we jump into everything though...

## WHY NOW?

- What made you hop on the phone with us today?

Got it.

### **Storytelling opportunity #1:**

Mention another client with a similar situation that you recently started working with  
We recently started working with {another company in their industry} to solve a similar problem

**Ok, let's jump in!**

## **2 - Creating the Gap**

- What's a KPI/OKR that you need to hit by the end of year?
- Are you on track or off track to hit that?
- What's the bottleneck? What's getting in the way?

### **Supplemental Questions Specific to your meeting ICP:**

(Add 5 -7 questions that are relevant to your ICP from the Question Bank Below)

#### **2 – Missing/Broken**

- What do you feel is missing or broken right now?

#### **3 – Need**

- What do you think you need right now?

## 3 - Closing

### Summarize

I've been taking a lot of notes so let's do a quick recap to make sure I've been listening and

Cool?

1. You really want to X, but Y is holding you back.
2. You've tried A & B, but haven't been able to make it work, and
3. X is happening, which is hurting you with all the Y.

Is that correct?

- On a scale of 1-4, 1- being, I'd like to get some ideas so I can think about these gaps more intelligently or 4- If we don't fill these gaps, I'm in trouble. How important is it to fix these issues quickly?
  - SCORE:
  - Why?

*\*\* The 1-4 scale is important because it has no middle so the prospect has to land on one side or the other. It will also help you push back if they mentioned a pressing need earlier and rate themselves a 1 at the end of the call. You want folks to have a 3 or 4 - that means it's urgent\*\**

### Storytelling opportunity #2

- Based on what you mentioned here this is the exact type of work we've done with XYZ to help them achieve their goals.

### SHARE YOUR OFFER

A Summary of your offer/ solution

### SETTING NEXT STEPS



So the best next step would be for us to schedule another call to talk more about how to implement these systems into your company.

How does that sound?

## **BOOK THE MEETING WHILE ON THE PHONE**

SO HERE'S WHAT YOU CAN EXPECT FROM ME AFTER THIS CALL

- EXPECT AN INVITE FORM XYZ DAY AT ABC TIME
- A SUMMARY OF OUR CONVERSATION
- AND A QUICK CASE STUDY FOR YOUR REVIEW

# **- END OF CALL**

## **Question Bank ex**

- What software(s) are you using? (i.e. Yardi, Quickbooks)
- How much do you spend monthly on those services or saas?
- Is your payroll done in-house? How much does that cost the company?
- How many people do you have working in the finance dept?
- What all roles exist currently?
- How do you handle retro activities currently?
- How often do you have to resubmit for reimbursements and why?
- How many months behind are you from knowing how much cash you truly have?
- Does your AP system allow you to attach records effectively?
- Why did you decide to have this call with us today?
- What challenges are you currently facing?
- How many systems does your financial teamwork in? I.e., Quickbooks, Yardi
- What does the process look like to get your month-end reporting?
- What do you currently like about your existing Billing setup?
- How much confidence do you have with your cash on hand?
- What are you asking the technology/service/product to do for you?