# Sales Discovery Call

## Introductory Call: [Organization Name] & [Prospect Name]

**January 1, 2026**
**10:00am – 10:40am**

**Meeting Purpose:**

An initial sales call to qualify a lead, learn more about their pain points, and discover a solution that might work for them.

**General tips for using the template**

- Start by adding a descriptive meeting time to easily find this information later. For example: Introductory Call: [Your Company] & [Prospect Company]
- This agenda is a flow, not a rigid script. The most important skill in a discovery call is active listening. Let the prospect's answers guide your follow-up questions. Your goal is to have them talk 80% of the time.
- Take detailed notes after each question is answered! Don't let it break the flow of your conversation, but the potential client's answers here are key to you moving forward.

**Tips for building rapport at the start of the call:**

- Use brief, professional small talk (e.g., reference their LinkedIn profile, a recent company announcement, or your mutual connection).
- Establish a clear mutually beneficial purpose: "Thank you for your time today. The goal of this call is for me to learn more about your role and your team's current process for [X], and to see if our solution might be a good fit to help."
- Set an informal agenda to outline the call: "To make sure this is valuable for you, I'd love to ask a few questions about your current setup, understand what's working and what's not, and then we can decide together if it makes sense to schedule a more in-depth demo. Does that sound good?"

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**10:00 – 10:05** — **Introduction & Agenda Setting**

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**10:05 – 10:15** — **Understanding the Current Client State**

- "To start, could you walk me through your team's current process for [the area your product services]?"
- "What tools or systems are you currently using to manage that?"
- "What parts of that process are working well for you right now?"
- "And what parts of that process are the most manual, frustrating, or time-consuming?"

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**10:15 – 10:25** — **Identifying Pain & Impact**

- Problem: "You mentioned [the frustrating part]... tell me more about that. What's the biggest challenge with that?"
- **Impact**
  - "What happens when [the problem] occurs?"
  - "How does that problem affect your team's [productivity/costs/revenue/customer satisfaction]?"

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| | ◦ "How much time would you say your team spends on [manual task] each week?" or "What's the downstream cost when that mistake happens?"<br>- Ideal State: "In a perfect world, what would this process look like for you?" |
| **10:25 – 10:35** | **Qualification & Buying Process**<br>- **Timeline**<br>◦ "What prompted you to start looking for a solution to this now?"<br>◦ "What's your ideal timeline for having a new solution in place?"<br>- **Purchasing Process**<br>◦ "When your team has evaluated tools like this in the past, what did that decision-making process look like?"<br>◦ "Who else, besides yourself, would need to be involved in this conversation?"<br>- **Budget**<br>◦ "Have you set aside a budget for this, or is this more of an exploratory conversation?" |
| **10:35 – 10:40** | **Close & Next Steps**<br>- Summarize: "So, if I'm hearing you correctly, the main challenge is [The Pain], and it's causing [The Impact]. You're looking for a way to [The Desired State]. Did I get that right?"<br>- The Pivot: "Based on everything you've shared, I'm confident we can help with this. The best next step would be a [tailored demo / technical call / strategy session] to show you exactly how we'd solve [The Pain]."<br>- The Ask: "Do you have 30 minutes open next [Day] or [Day] to book that now?"<br>- Recap: "Great. I'll send a meeting invite for that right after this call, along with a brief email recapping what we discussed. |