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?"

10:00 – 10:05	**Introduction & Agenda Setting**
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?"

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]?"

	○ "How much time would you say your team spends on [manual task] each week?" or "What's the downstream cost when that mistake happens?" - Ideal State: "In a perfect world, what would this process look like for you?"
10:25 – 10:35	**Qualification & Buying Process** **- Timeline** ○ "What prompted you to start looking for a solution to this now?" ○ "What's your ideal timeline for having a new solution in place?" **- Purchasing Process** ○ "When your team has evaluated tools like this in the past, what did that decision-making process look like?" ○ "Who else, besides yourself, would need to be involved in this conversation?" **- Budget** ○ "Have you set aside a budget for this, or is this more of an exploratory conversation?"
10:35 – 10:40	**Close & Next Steps** - 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?" - 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]." - The Ask: "Do you have 30 minutes open next [Day] or [Day] to book that now?" - Recap: "Great. I'll send a meeting invite for that right after this call, along with a brief email recapping what we discussed.