



# DISCOVERY CALL CHECKLIST

## *Thoughts*

Use zoom or other online meeting program

Have a nice background in your workspace/home

A disorganized background could take away your authority on the call

- Client Intake Form
- Discovery Call Sales Script
- Pen / Pencil
- Coffee, Tea or Water (My favorite is Chai Tea)
- Great lighting (you want to be seen)  
*\*Hack: Sitting in front of a window work awesome*
- Note pad or open Google doc to take notes
- Headset

*Consider these as your business grows:*

- Invoice System (I use Waveapps - it's free)
- Professional Back Drops: [INK&ELM](https://www.inkandelm.com)



# INITIAL CONTACT FORM

## *Actions:*

Create an Initial Contact Form (I use Google Forms)

Make all questions on the form \*REQUIRED

## *Questions:*

- Name
- Email address
- Website
- Primary social media platform
- Phone number
- What's your timezone?
- How did you hear about <<*insert your business name*>>?
- What's your niche?
- Have you purchased resources to help your business?
- Are you generating consistent income in your business?
- If yes, what's your average monthly revenue?
- Do you use checklists or workflows? If yes, kindly describe what they are.
- What's the primary frustration that you feel is holding you back in your business?
- What is your ideal project start date?
- Do you have an initial budget for hiring someone to help you sort out these issues?  
>>  *This is an important question...see more in the sales call script.*
- What issue brought you to contact me?
- Is there anything else I need to know?



# DISCOVERY CALL SALES SCRIPT

This discovery call script is based off of the questions asked in the client intake form. Be sure to print potential client responses prior to the call.

## *Considerations:*

This call is about the client. The **PURPOSE** of the discovery call is to get the potential client to open up and discuss the core problem so you can offer/share the solution.

**Hello [NAME]. How are you today?**

**Thank you for taking the time to complete the client intake form and join this call today.**

>> It's important that YOU lead the call from the start. An easy way to do that is to state the purpose of the call and how you can work together.

**The purpose of our call today is to dive into your business's needs and talk about how we can work together.**

>>Check in with the client throughout the call and get buy in from the beginning.

**Does that sound okay?**

>>Wait for response

**Based on your client intake form your business is <<INSERT BUSINESS>> and serve <<INSERT NICHE>>, correct?**



# DISCOVERY CALL SALES SCRIPT

>>This next question will provide insight into their current team structure, problems they might have had in the past with a team member, and/or how much guidance they may need if they have NEVER hired anyone before.

**You also stated in your intake form that you are <<or are not>> currently working with a team, is that correct?**

Follow-up questions for more insights:

1. What has been your experience building a team?
2. Is this your first experience working with a team? *\*Clue into how much hand holding they may need through this process.*

**Is <<insert price>> the budget for this project/position, is this still correct?**

>>  *If they didn't list a budget price for the project...*

**Ask them if they have a budget for the program or position.**

>>Wait for response

**Alternative question: My packages start at <<insert price>>. Does this fit within the budget you have for this position?**

>> Wait for response



# DISCOVERY CALL SALES SCRIPT

**What is the biggest goal for your business in the next 90 days?**

>>Wait for response

**What steps have you tried in the past to achieve this goal?**

>>Wait for response

☆☆☆☆ This is an opportunity to **SPARKLE** and help them overcome their obstacle with your product / package / service!!

**What is the biggest obstacle holding you back from accomplishing that goal?**

>>Wait for response

**How is this obstacle making you feel?**

☆☆☆☆ **SPARKLE OPPORTUNITY** ☆☆☆

**If you could change one thing about the systems in your business, what would it be?**

>>Wait for response

**How would you feel to accomplish your on-going goals?**



# DISCOVERY CALL SALES SCRIPT

**How would you feel to accomplish your on-going goals?**

>>Wait for response

**Transition the call to your offer. YOUR SERVICES & PACKAGE**

**Based on what you have shared with me, I have a package or services that can <<ADDRESS/OVERCOME OBSTACLE>>**

**I'd like to go through a few key points that can help overcome the obstacles you have faced in the past and get to <<INSERT GOAL>>.**

>>Wait for response

Review your package and align the key points to your potential client's desired goal.