Mastering Sales Discovery
12 Best Practices for Success

1. Conduct Thorough Pre-Call Research
- Research the company and learn their business objectives, strategies & initiatives
- Understand your prospect's role and responsibilities
- Find problems you solve with your solution!

2. Build Rapport and Trust
- Show genuine interest in prospect's needs and concerns to earn credibility
- Put them first - have a conversation and find common ground using insights from research

3. Ask Open-Ended Questions
- Use questions requiring more than yes/no answers - who, what, where, when, why, how...
- "Here are the challenges I've learned while preparing for our call. Please confirm my research is accurate or redirect me to ensure our time together is efficient"

4. Listen Actively
- Pay full attention, take notes, avoid interrupting
- Ask an open-ended question (who, what, when, where, why, how...) immediately after your prospect is finished
- Internalize their information and reflect back what you've heard to confirm understanding

5. Identify Pain Points
- Ask open-ended questions to uncover underlying issues and challenges to their objectives, strategies and initiatives
- Drill in when found: "Would you please explain that further?" "Would you describe how that affects progress?"

6. Understand Their Goals
- Identify both short-term and long-term objectives "How does that affect you on a 12-month timeline?"
- Ask about key success metrics and desired outcomes "How are you measuring success or failure over that timeline?"

7. Leverage Social Proof
- Share relevant testimonials, case studies, and success stories as proof you've solved similar issues in the past
- Highlight how similar clients have benefited from your solution and share the associated metrics

8. Qualify the Lead
- Ask "How do you plan on funding the solution that you choose to solve this problem predictably for you?"
- Determine if the prospect is a good fit for your solution

9. Tailor Your Pitch
- Based on what you've learned through discovery customize your value proposition to the prospect's specific needs
- Focus on how your solution solves their unique problems then describe how your solution solves their unique challenges

10. Handle Objections Gracefully
- Listen to objections fully before responding
- Acknowledge concerns and provide clear, thoughtful responses "Help me understand why you feel that way"

11. Establish Next Steps
- Clearly outline next steps in the sales process
- Set expectations for follow-up actions and timelines
- "Here's what we find the most successful as next steps with our clients..." and then ask for an introduction to a new ideal persona

12. Follow Up Consistently
- Recap every meeting and provide additional value in each follow-up - write a closed loop communication and ask them to correct any misunderstanding
- Schedule regular check-ins to maintain engagement

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