

Discovery Framework

This document details the purpose of each step, providing conversational examples.

Step	What is it?	Why do we do it?
1. Intro	Your initial remarks as you kick off the call.	Builds trust and starts to establish a positive relationship.
2. Purchase Journey	(For Sales only) . Asking the customer where they are in the purchase journey. Are they “just browsing” or are they “actively looking”?	Determines how you run the conversation and next steps. Builds trust . Gives you control over the conversation. Helps you qualify the opportunity.
3. Agenda	An overview of what you plan to cover on the call (tailored for the customer based on where they are in the purchase journey).	Helps you build your relationship . Demonstrates professionalism and respect . Gives you control over the conversation.
4. Level-Setting	Asking questions that ensure the customer has the right perception of us and our value.	Customers often have the wrong/suboptimal perception. If we don't fix that, they often say “no” to something very different from what we're trying to sell them. Teaches the customer something new/valuable .
5. Recommended Evaluation/Service Process	Explaining our recommended steps for evaluating/realizing value from our product.	Understanding the “why” behind our discovery questions makes the customer more comfortable sharing information . Shows the customer what they can expect as a partner.
6. Discovery	A series of questions (and follow-up questions) to (1) qualify the opportunity, (2) tailor your pitch, (3) motivate the customer to purchase, and (4) effectively manage the purchase process.	Qualify the opportunity. Tailor your pitch/demo. Get the customer to see that they can't do nothing . Gain control over the sale (understanding internal processes, key players, etc.).
7. Mutual Action Planning	Working with your Catalyst-Champion (or Key Influencer-Champion) to formally document the steps required to help the customer achieve their objectives and success measures by their deadline.	Creates urgency . Ensures we both understand what must occur and have “skin in the game.” Helps flesh out the Power Map .
8. Next Steps	Actions you will take after the call based on the outcomes of your conversation.	Helps ensure the deal progresses .