

Sales Quest: The Framework

Structure and optimize your sales discovery process. Use the steps below to plan and navigate your business calls effectively while earning XP to track your mastery. Complete daily tasks, handle objections, and leverage quick wins to level up your discovery

Step 1: *Preparation*

- Research** the prospect's industry, company, and key players
- Identify** potential **pain points** based on similar clients
- Develop 3-5 strong **discovery questions**

Step 2: Opening the Call

- Establish rapport and set the agenda
- Confirm the prospect's role and objectives
- Get **buy-in** for a structured discussion

Step 3: *Identify Pain Points*

- Ask open-ended questions to uncover challenges
- Dig deeper using follow-up questions
- Understand the emotional and business impact of pain points

Step 4: *The Decision Process*

- Identify **key stakeholders** involved in **decision-making**
- Determine the **timeline and budget** considerations
- Uncover **potential roadblocks** early

Step 5: *Align Business Goals*

- Connect your solution to their strategic priorities
- Share relevant case studies or success stories
- Establish clear next steps for follow-up

{Notes}

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Sales Quest!

Level up your discovery skills

After a sales call, review your notes and check off each challenge that you've completed below. At the end of the week, review this document and identify items that need to be completed. Find the treasure at the end of the Quest in a closed sale!

Progress:

10	20	30	40	50	60	70	80	90	100	110	120	130	140	150	160	170	180
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5 XP

Daily Quests



- ☐ Identify the prospect's **biggest challenge**
- ☐ Understand their **current solution** and **pain points**
- ☐ Determine key **decision-makers** and buying process
- ☐ Ask about **budget constraints**
- ☐ Uncover **timeline** an

20 XP

Advanced Discovery



- ☐ **Map** out the prospect's **buying journey**
- ☐ **Identify** and **handle objections** early
- ☐ **Pinpoint** potential **deal blockers**
- ☐ **Align** the solution with **business impact**
- ☐ Get verbal or written **confirmation of next steps**

10 XP

Power Ups!



- ☐ **Repeat key insights** to confirm understanding
- ☐ **Use storytelling** to create an emotional connection
- ☐ Leverage **social proof** (case studies, testimonials)
- ☐ Ask a **thought-provoking question** to challenge assumptions
- ☐ **Summarize** and **confirm next steps** at the end of the call

Achievements



- ☐ Curious Challenger—Asked 10 strong discovery questions
- ☐ Objection Overlord – Successfully handled 5 objection
- ☐ Sales Sage – Earned 100 XP through discovery mastery