Discovery Call Framework

Purpose: Qualify the client, uncover real needs, confirm budget and authority, and position Connor & Co. as the strategic technical partner.

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1. Opening (5 Minutes)

Objective: Build rapport and set expectations.

Script Anchor: "Thanks for taking the time today. I'd love to understand your goals, current bottlenecks, and see if we're the right fit."

Notes:

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2. The Problem (Core Section)

Goal: Identify real business pain.

- What are you trying to build?
- Why now?
- What problem does this solve?
- What happens if this doesn't get built?

Notes:

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3. Current State

Goal: Understand technical and strategic context.

- Do you have existing designs or code?
- What tech stack are you using?
- Have you worked with agencies before?
- What did you like / dislike about that experience?

Notes:

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4. Budget Qualification

Goal: Confirm seriousness and alignment.

- Have you allocated a budget for this project?
- Are you exploring one-time builds or ongoing support?

Notes:

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5. Timeline

Goal: Determine urgency and feasibility.

- When are you looking to start?
- Do you have a launch deadline?

Notes:

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6. Decision Authority

Goal: Ensure you are speaking to the decision maker.

- Are you the final decision maker?
- Who else is involved in approval?

Notes:

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7. Positioning Connor & Co.

Objective: Frame your value clearly and confidently.

Key Points to Communicate:

- Boutique, high-quality execution
- Modern tech stack (Next.js, Webflow)
- Clean code and scalable architecture
- Transparent process

Close with: "Based on what you've shared, I think we can help. I'll put together a proposal outlining scope, timeline, and investment."

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8. Red Flags Checklist (Internal)

Do NOT proceed if:

- No budget awareness
- Unrealistic timeline
- Vague objectives
- No decision authority
- Price shopping only

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9. Call Outcome

- Qualified — Send Proposal
- Needs Clarification — Follow-Up Questions

- Not a Fit — Decline Politely
