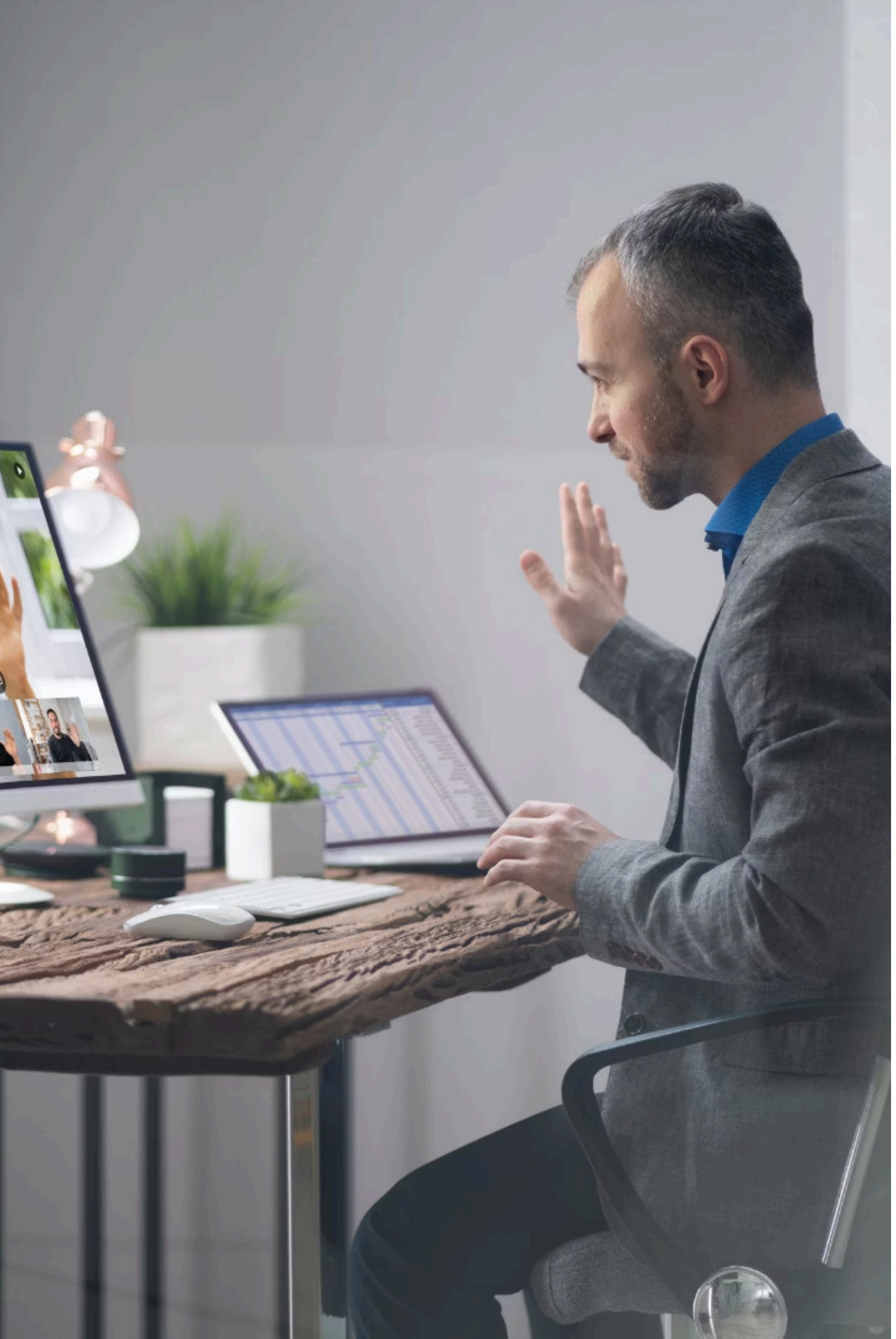

Step 1: Discovery Call Questions

Qualify leads, establish authority, and set the stage for strategic growth.

Congratulations on Securing a Discovery Call!

This is a major step forward. A Discovery Call isn't just a chance to hear out a prospective client. It's your opportunity to position yourself as a strategic leader (not a vendor) and assess whether the client is the right fit for your expertise.

Call Structure (20-25 minutes total):

- Welcome & Frame (2 min) - Position yourself as the host and strategic partner
- Why Me, Why Now? (3 min) - Surface motivation and timing
- Understanding the Business (5-7 min) - Business overview, offers, channels, team, revenue
- Future Vision (3-5 min) - Where they want to be in 12-24 months
- What's Holding You Back? (5 min) - Uncover barriers and gaps
- Recap & Qualify (3-5 min) - Confirm alignment and decide next steps

Remember:

- You're qualifying them just as much as they're qualifying you.
- Your goal on this call isn't to pitch or coach. It's to gather the right information. Their current situation, growth goals, key challenges, and urgency. So, you can decide if a follow-up strategic growth session makes sense.

If they're a fit, that second call is where you'll present your tailored plan, pricing, and path forward.

Pro Tip: Your job on this call is to **qualify, not solve**. Save the plan for the next call and save the strategy for the engagement.

Welcome & Frame the Call (2 minutes)

Start strong. Remember that you're driving the conversation and the host.

> ## Sample Opener:
>
> *"Thanks again for making time today. The goal of this call is simple: I'll ask a few questions to better understand where your business is now, where you want it to go, and whether I'm the right strategic partner to help get you there. If it feels like a good fit, I'll walk you through what comes next, including a short Marketing Assessment we'll use to guide the strategy."*

Why Me, Why Now? (3 minutes)

Quickly surface their motivation and timing for engaging with you.

Questions:

- *"What prompted you to reach out now?"*
- *"What were you hoping to explore today?"*
- *"Is there a specific challenge or goal you're trying to address?"*

Understanding the Business (5–7 minutes)

Get a high-level view of the company's engine by asking key questions about their current state and future aspirations.

Business Model

- "How would you describe your core business model?"
- "Who are your ideal customers, and what problems do you solve for them?"
- "What makes your business unique or different from competitors?"

Offers/Products/Services

- "What are your primary products or services?"
- "Are there specific offerings you're looking to grow or new ones you plan to introduce?"
- "How do customers typically purchase or engage with your offerings?"

Channels/Marketing

- "Where do your customers typically find you?"
- "What marketing and sales channels are currently working best for you?"
- "What challenges are you facing in acquiring new customers or retaining existing ones?"

Team/Operations

- "Tell me about your team. Who handles what?"
- "What does your day-to-day operation look like?"
- "Are there any operational bottlenecks or areas where you feel stretched thin?"

Revenue/Financials

- "What does your revenue growth look like, historically and currently?"
- "Are there any particular revenue targets or financial goals you're working towards?"
- "What are your biggest costs or investments right now?"

Future Vision (3–5 minutes)

Help them articulate where they want to go.

Questions:

- *"Where do you want the business to be 12–24 months from now?"*
- *"What are your biggest growth goals?"*
- *"Are there new markets or opportunities you want to pursue?"*

What's Holding You Back? (5 minutes)

Uncover barriers to progress, both strategic and tactical.

Questions:

- "What's preventing you from hitting those goals today?"
- "What have you tried so far?"
- "Where do you feel the biggest gaps are: Strategy? Execution?"

Recap and Qualify (3–5 minutes)

Clarify alignment and reflect back what you've heard. At that point, you can qualify to determine if this is a client you can work with.

> ## Paraphrase back what you heard:
>
> *"It sounds like you're [current state], aiming for [future state], and the main obstacles are [X, Y, Z]. Does that sound accurate?"*

If it's not a fit

Politely close.

If it's a fit

Move to the next steps with confidence.

Next Steps

If they are a fit:

"It sounds like we're aligned, and I believe I can help you achieve [key goal]. The next step would be scheduling a full Strategic Growth Session where I'll build and walk you through a plan specifically tailored to your goals.

Before that call, I'll send over a quick Marketing Assessment to dive in a little deeper. It's short but powerful and will help ensure we're focusing on the right priorities.

I have a few openings next week. For example, [Monday at 10:00am], [Tuesday at 2:00pm], or [Wednesday morning].

Would any of those times work for you?"

If they are not a fit:

"Based on everything you've shared, I may not be the best partner for your current needs. I'll share a few recommendations and resources that might help you move forward."

Red Flags to Watch For During Discovery Calls

Flag	Why It Matters
Dodges revenue or team size questions	Hiding true business health or seriousness, harder to scope and price effectively
Aggressively blames past agencies or consultants	May be difficult to work with, uncoachable, or lacks internal accountability
Unclear about goals or vague about growth	May be hard to deliver results or measure success without clear targets
Treats you like a "doer" not a strategist	Misalignment: they need execution, not strategic leadership
No urgency to act	Risk of wasted time in endless follow-up cycles with no real decision-making

Discovery Call Follow-Up Email Template - V1

Subject Line: Great connecting today! Here are some next steps.

Hi [Name],

Thanks again for making time to connect today. It was great learning more about [Company Name] and your goals for [highlight their big goal if possible]. As discussed, the next step would be a deeper Strategic Growth Session where we can map out a tailored plan to help you [achieve outcome they want].

Here are a few times I'm available next week:

- Monday, 10:00am [Timezone]
- Tuesday, 9:00am [Timezone]

Let me know what works best, and I'll send over a calendar invite with the Zoom link. Looking forward to continuing the conversation and building something great together!

Best,
[Your Name]
[Your Title | Company Name]
[Optional: Website Link]

Discovery Call Follow-Up Email Template - V2

Subject Line: Next Steps - Let's Build Your Growth Plan

Hi [Name],

Thanks again for sharing more about [Company Name] and where you're headed. I'm excited about the potential to help you [insert goal they shared]. As we discussed, the next step is scheduling your Strategic Growth Session.

That's where we'll dive deeper and map out a tailored plan to move your business forward. In the meantime, please fill out this Strategic Marketing Assessment. It's short but powerful and helps ensure we're focused on the right priorities from the start.

Here are a few times I'm available next week:

- Monday, 10:00am [Timezone]
- Tuesday, 9:00am [Timezone]

Let me know which one works best, and I'll send over the calendar invite. Looking forward to building a real growth plan together!

Best,
[Your Name]
[Your Title | Company Name]
[Optional: Website Link]

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Mastering the Discovery Call is just one part of building a thriving, scalable Fractional practice.

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