Sales Mastery:

Discovery Session Process

## Introduction to The Discovery Session Process

The Discovery Session Process can be applied to any situation where you are connecting with and qualifying a prospect to make sure they are the right fit for you and your business, before progressing them through to the next stage of your sales process.

The goals of the Discovery Sessions are:

1. To not spend quality time with non-quality people.
2. To build trust quickly and qualify fast, in a way that sets you up for success in the next call.
3. To position yourself, your team and your brand in the right way in the hearts and minds of your customers
4. The goal here is to explore and determine fit, it is **not to fix their problems**.
5. To have the prospect excited about progressing to the next stage, feeling like they’re in control, and in the right place

This is a nine-step framework that outlines what we do, why, and even what to say and when, all demystified and put into a structure you can adapt and install into your business.

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## The 9 Steps Of The Discovery Session Process

Step 1: Take Charge

Step 2: Frame Up

Step 3: Prospect Snapshot

Step 4: Increase Desire

Step 5: Elicit Goals

Step 6: What Do You Need Most?

Step 7: Later or Sooner?

Step 8: Summarize

Step 9: Best Next Step

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## STEP 1. TAKE CHARGE

DESIRED OUTCOMES:

1. Set yourself up as the leader of the conversation. I’m the question asker, you're the question answerer.
2. Fire a Memory Anchor that puts their motivation as the reason for the discussion.
3. Elicit the customers primary intent, need and establish urgency

THINGS YOU DO AND SAY:

### 1.1 Fire Memory Anchor

If they’ve come from a lead:

“I’ve got a note here in my calendar that we’ve got a Discovery Session booked in right now that you arranged after you reached out from [lead source], are you ready to roll?”

If they’re coming from a Sales Development Representative:

“I’ve got a note here in my calendar that we’ve got a Roadmap Session booked in right now that you arranged with [SDR] after you reached out from [lead source], are you ready to roll?”

### 1.2 Gauge how much they know about you and your business

“So I know the best place to start, how much do you know about us, is it just from [lead source / SDR] or have you been following us for a bit longer than that?”

### 1.3 Why us, why now?

“And really curious, before we get started, what was it about [insert previous step here: lead source / your chat with SDR] that made you want to reach out and have this session? Why us and why is this a ‘now-conversation’ for you?”

Here if they answer with a broad answer, you want to chunk down to get more specific. You want to know what problem they have that has motivated them to have the call.

A good answer would be, “We are struggling to generate leads.”

A poor answer that you would want to chunk down on would be, “It looked like good content” or “[SDR] said it was going to be the right thing for me to do.”

To chunk them down to greater specificity say:

“That’s great. And what’s going on for you that makes this a now-conversation? What’s the main problem we should be focused on?”

“Great, so that’s why now, what was it about [company] that made you want to reach out?”

### If you still feel like you haven’t uncovered a relevant need, chunk down using ALF: Ask, Listen, Formulate

ALF with one or two example questions:

What impact is this having?

How is that a problem for you?

Elaborate on that for me…

You said “[insert their phrase]”, in what way?

How specifically?

What do you mean by that?

**Optional Frame** - If the customer is still not verbalising urgency:

“It seems like you’re ready to get started on the path to solving this issue which makes it a good time to chat. It sounds like you’ve drawn a line in the sand and are just trying to figure out what your best next steps are or have I got that wrong?”

If you can’t uncover a need or urgency, politely end the conversation here.

### 1.4 Reflect back to them the importance of having this discussion now

“Great, **I can see why you’ve reached out**. It sounds like this is pretty important for you that we jump on top of this now.”

Wait for a response.

“Got it!” [Empathise and affirm they are in the right place, giving them **certainty**]

### 1.5 Transition to Frame-Up

“Great, well because you [know us well / only know a little bit about us], let me tell you what we’re going to do.”

## STEP 2. FRAME UP

DESIRED OUTCOMES:

1. Show them they’re in safe hands because you have a process that you take people through, they’re not worried about “what’s going to happen”.
2. Set the parameters of the conversation
3. Let them know that if you decide to take it further, you will tell them what their best next step is

THINGS YOU DO AND SAY:

### 2.1 Explain this call in three steps

If the prospect is a **medium** intent lead:

“The key to our conversation today is that we don’t have a lot of time and quite a bit of ground to cover. **I’ve got a framework I like to use for sessions like this**, there’s three things I’d like us to do today:

1. The first step which we are doing now, I’ll ask some super simple questions to get a grasp on your [current situation and desired outcomes] to make sure I feel we can help.
2. I’ll also share with you, through the lens of our existing customers, a little bit more about us and how we [achieve the results that we do], just to make sure what we do resonates with you.
3. After that, if I feel like we ***can’t*** help, I’ll let you know politely and try to point you in the direction of someone that can, is that cool?

And if I feel like we can then we’ll book in a Roadmap Session which is where we’ll dig deeper into your [problems and opportunities] which will help me tailor a specific plan just for you. Then if you want to talk about the “HOW” I can walk you through how we can tailor [product / service] to help you achieve that. How does that sound?”

If the prospect is a **higher** intent lead:

“The key to our conversation today is that we don’t have a lot of time and quite a bit of ground to cover.

1. My job is really simple, I’m going to ask you a bunch of questions really quickly to work out if or how we can help. If I feel like I can’t help, I’ll let you know politely and try to point you in the direction of someone who can, is that cool?
2. And if I feel like we can, we’ll book in another call to talk about “HOW”, is that alright?
3. Like I said, we’ve only got [x] minutes and I’ve got someone booked in straight after you so if it’s ok with you I’d like to jump straight in, I’ll ask simple questions if you can give me nice short answers that would be great, is that cool?”

## STEP 3. PROSPECT SNAPSHOT

DESIRED OUTCOMES:

1. Show you have done your research to the best of your ability and understand their story
2. Elicit the qualification criteria to determine whether the prospect is qualified to buy your product and / or go on to have a Roadmap Session
3. Have the customer tap into their emotional reasoning for being here and find connection points.

THINGS YOU DO AND SAY:

### 3.1 Frame that you’ve done some research if you have

“I’ve had a look at [your website / your socials / the documents you sent over / the notes from your conversation with SDR], but I’d love to start at the beginning, tell me a little bit about your [Insert topic of conversation here: health and fitness journey, injury history, customer journey, business, website, existing marketing, current wardrobe, existing property portfolio]”

### 3.2 Ask 3 - 5 simple questions to get a snapshot of whether the prospect is qualified

Example questions for different business types:

**If you are an IT Services business:**

1. What is your current IT infrastructure like?
2. Are you currently working with an external IT service provider or do you have an in-house team?
3. What's the typical budget for IT related expenses in your organization?
4. Are there any specific IT-related challenges you are currently facing?
5. How soon are you looking to implement changes to your IT system?

**If you are a Real Estate business:**

1. Are you looking to buy or sell a property?
2. Have you worked with a real estate agent before?
3. What's your budget range for this real estate transaction?
4. When do you plan to make this transaction?
5. Are there any specific locations or features you are interested in for the property?

**If you are a B2B Equipment Sales business:**

1. What is the current state of your equipment and how old is it?
2. What's the typical lifespan of your equipment and when do you plan to replace them?
3. What's the budget range you usually allocate for equipment acquisition?
4. How frequently do you upgrade your equipment?
5. Are you facing any specific challenges with your current equipment?

**If you are a Digital Marketing business:**

1. What marketing channels are you currently using for your business and how many leads is it generating each month?
2. Have you hired a digital marketing agency or professional in the past?
3. What's your marketing budget for the next quarter or year?
4. Are there any specific goals or KPIs you're aiming to achieve with your marketing efforts?
5. How soon are you planning to start a new marketing campaign?

**If you are a Business Consulting business:**

1. Have you engaged with a business consultant or consulting firm before?
2. What are some of the primary challenges your business is currently facing?
3. Do you have funds allocated for consultancy services?
4. What are your expectations from a consultancy service?
5. When do you plan to start implementing the suggested changes or strategies?

### 3.3 Elicit decision makers so that when you book in their Roadmap Session, you can ensure all decision makers are invited

“Ok great, and who else is involved in helping you make decisions around [topic]? If we’re going to make a plan, who else needs to be there in order for you to sign off on the plan so that you’re ready to just roll with it?”

[Response]

“Got it. Well it sounds like you guys are in this together, is that right?”

## STEP 4. INCREASE DESIRE

DESIRED OUTCOMES:

1. To gain permission to start introducing them to how you can help
2. To uncover resonance between what you offer and what they want
3. To be in agreement that they want what you have

THINGS YOU DO AND SAY:

### 4.1 Insert them into your product and gain permission to tour

“Great, so before we go any deeper, would you like me to give a quick snapshot of how we help [insert their avatar here] to [move beyond their problem state] and [achieve their desired outcome]?”

“Great. Have you got a pen there?”

“What we do at [Your Co.] is really simple, we can break it down into three parts.”

### 4.2 Outline your three core product pillars using why, what, effect

WHY [-]

[Introduce the **need**, problem state or context for why this pillar existing]

“The biggest problem we find that [AVATARS] have is that they find themselves [MAIN PROBLEM].”

WHAT

[Explain the pillar that solves that problem, in one or two sentences]

“That’s why the foundational pillar of everything we do is [INSERT PILLAR].”

EFFECT [+]

[Explain the positive effect or benefit of this pillar]

So that…

That’s why our customers find…

If you can imagine…

So, you always know…

Do this for your three core pillars, tailoring each one in a sentence or two to the prospect.

### 4.3 Uncover resonance

“Do these resonate with you in some way, shape or form?”

“How so?”

Have them articulate further WHY they love what you do.

Example questions:

That’s great, what is it that resonates with you about that?

I thought you were going to say that, tell me why that resonates…

Why do you say that?

In what way?

That’s super interesting, elaborate on that for me…

How specifically?

### 4.4 Transition to eliciting goals

Great, now that we know that where we’re going resonates with you, let’s get a picture of what you want to achieve...

## STEP 5. ELICIT GOALS

DESIRED OUTCOMES:

1. To elicit what they believe they’re most important goals are
2. To determine their ‘toward buying motivators’
3. To make a note of their goals, and recap them when closing into the Roadmap Session

THINGS YOU DO AND SAY:

### 5.1 Elicit their key business goals

## “What are the top 2-3 most important goals you have for [topic of your solution] over the next 12 months?”

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## STEP 6. WHAT DO YOU NEED MOST?

DESIRED OUTCOMES:

1. To emphasise the pain points the customer needs to take action to solve
2. To move them into a state of action and urgency
3. To set-up the best next step as an absolute necessity

THINGS YOU DO AND SAY::

### 6.1 Bring to the surface what’s broken or missing, their biggest problem, and what they need the most

“What’s broken or missing?”

“What’s the biggest problem for you right now, that if solved, would have the biggest impact?”

“And what do you need the most?”

## STEP 7. LATER OR SOONER

DESIRED OUTCOMES:

1. To have the customer reiterate that that this is a now conversation for them
2. To establish and pre-frame urgency for them to make a decision during or shortly after the Roadmap Session
3. To utilise their momentum heading into Steps 8 and 9

THINGS YOU DO AND SAY:

### 7.1 Later or sooner

“Is this a later thing for you, or a sooner thing?”

## STEP 8. SUMMARISE

DESIRED OUTCOMES:

1. This step is critical as it should be the best summary of their situation they have ever heard. It is emotionally freeing for them to hear someone else articulate so clearly where they’ve been, where they are, what their challenges are, and succinctly summarise what they need to do to achieve their goals. The prospect will sigh a breath of relief inside, thinking, “Ahhh, this person really gets it.”
2. To demonstrate that you understand them, their situation and what needs to be done better than they do
3. To draw to a close the ‘discovery’ part of the conversation, and to ensure that you’ve covered everything that needs to be covered, there’s nothing further that needs to be discussed other than the best next step. The summary prevents them from objecting mid-close and saying something like, “But we haven’t discussed [x]” or “That won’t work because [x]”. We’ve covered everything, we’re in agreement, we are resolved and ready to move forward.

THINGS YOU DO AND SAY:

### 8.1 Summarise everything they have given you, mirroring their words for empathy, and adding your words for expertise

“Based on what you’ve told me…

[SECTION 1] Why us / why now problems

[SECTION 3] Prospect Snapshot

[SECTION 5] Goals

[SECTION 6] Broken or missing

[SECTION 6] Biggest problem that if solved would make the biggest difference

[SECTION 6] What they need the most

[SECTION 7] Sooner conversation because…

…Am I missing anything?”

## STEP 9. BEST NEXT STEP

DESIRED OUTCOMES:

1. To qualify them out the exit door if they’re not a fit, or the best next step door if they are
2. To give them certainty they are in the right place and you can help them
3. To ensure all decision makers will be present for The Roadmap Session

THINGS YOU DO AND SAY:

### 9.1 Reiterate that you were going to make a decision as to whether you could help and confirm that you can

“Ok, I said right at the start of the call that my job today was to ask you a bunch of questions to work out if or how we could help, I said that if I felt like we couldn’t help I’d let you know politely and point you in the right direction, and I said that if we are a fit and I feel like we can help then the next step is to book another call to talk about **how**.

So the good news is:

“We specialise in solving problems exactly like this.”

Or

“These are the exact problems we help our best clients to fix.”

### 9.2 Reassure them that you work with people exactly like them on problems exactly like theirs

“As I said, we help [insert **their** avatar here], and the core challenges we help them to overcome are:

[Insert Prospect challenge 1 Here]

[Insert Prospect challenge 2 Here]

[Insert Prospect challenge 3 Here]”

### 9.3 Tell them what the next step involves

“So, the next step is to book another call to map out a plan and talk about **how**. We call this A Roadmap Session and it’s going to be just like today but instead of 25 minutes it’ll be about 90 minutes and on that call we’re going to look at exactly how it is right now (top challenges and how to solve them, top opportunities and how to achieve them), what’s really possible for you right now in terms of [outcomes they want to achieve], we’ll map out an action plan and talk about how we can help you implement that.”

“How does that sound?”

### 9.4 Confirm decision makers

“You mentioned earlier that [name] is involved in helping you make these sorts of decisions so let’s book a time that works for all of us.”

Or if decision makers still haven’t been elicited:

“Ok great, who else is involved in helping you make decisions around this? If we’re going to make a plan, who else needs to be there in order for you to sign off on the plan so that you’re ready to just roll with it?”

### 9.5 Lead the book in process

**“**I’m just opening up my calendar, have you got yours there?”

“OK, this afternoon at [time] or tomorrow at [time], looks good which suits you?”

“This Roadmap Session will go for anywhere between 60-90min, so let’s set aside 90 minutes and we’ll use zoom so I can screen share with you, will you have this set up ok?”

“And this time works well for [other decision maker] also?”

“Great, I've just sent you a calendar link, just accept that now.”

“For The Roadmap Session, we’ll be able to make the most of our time if you can bring with you [give them homework], will you be able to make sure you have that handy?”

“This will help me to guide you best on which parts of our [product or service] will help you the most, so we’ll have a really clear idea of how we can best help.”

### 9.6 Wrap up

**“**Brilliant, I look forward to seeing you [and other decision maker] then!”