

Discovery Call Framework (The 'Automation Audit')

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Department: Sales Enablement

Call Objective: Challenge the Status Quo and Quantify the Problem

Phase 1: Context & Upfront Contract (5 min)

- **Goal:** Set the agenda, secure permission to ask tough questions, and confirm the time limit.
- **Script Opener:** "Thank you for the time. By the end of this 30 minutes, we aim to confirm if your [Problem Area] is critical enough for an automation solution. I'll ask about budgets, current risks, and who else needs to weigh in. Does that sound fair?"

Phase 2: Pain & Process Deep Dive (15 min)

- **Challenge Questioning (The "Teach"):** "We've noticed that companies in the [Client Industry] typically spend X hours a week manually reconciling data, which exposes them to Y compliance fines. Is this true for you, or is your process unique?"
- **Quantification (The "Need"):**
 - **Scale:** "How many data points/transactions run through this workflow daily?"
 - **Cost:** "What is the fully burdened cost of the team that handles this data? What is the cost of a single error or mistake?"
 - **Risk:** "What is the *non-financial* risk if this process fails next quarter?"

Phase 3: Budget, Authority, and Timeline (10 min)

- **Budget (The "Anchor"):** "Given the risk you described, if we could guarantee a 20% efficiency improvement within 6 months, how much capital would you be prepared to allocate to solve this problem?"
- **Authority (The "Map"):** "If you decided to move forward, what would the internal process look like? Who needs to sign off on the financial and technical commitment?"
- **Next Step Commitment (The "Control"):** "Based on what we've discussed, the logical next step is a tailored 45-minute demo showing the precise workflow automation. Are you prepared to involve your Head of Data Science and Procurement team for that next meeting?"

Success Criteria

- AE has successfully gathered enough information to complete the **Nexa-BANT Checklist**.
- AE has secured a firm next-step meeting with a verified Decision Maker.
- Client has verbally acknowledged the financial pain of the status quo.