Discovery Call Framework for Custom AI Solutions

Why This Guide Exists

This guide distills the proven discovery framework that we've used to close over **$500,000 in signed custom AI services revenue** across dozens of clients. It's the synthesis of insights from 100+ calls and 20+ implementations. Whether you're leading discovery for a solo consultancy or scaling AI services as a firm, this guide will help you:

- Lay the foundation on the 1st call for a successful deal
- Identify automation-ready opportunities that generate ROI
- Assess strategic alignment and urgency
- Build trust and authority as a strategic partner — not just an n8n dev shop

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Pre-Call Setup: Laying the Groundwork

At TrueHorizon, we deploy an **in-house Client Research Agent** that activates as soon as a prospect completes our website intake form or books in a discovery call. This agent:

- Crawls the prospect's **Website, LinkedIn profile** and their **company LinkedIn page**
- Compiles insights on their **industry, size, location, and offerings**
- Generates a **strategic automation opportunity brainstorm** based on prior builds we've deployed in similar verticals

This pre-call brief helps us enter every meeting with:

- Contextualized ideas tailored to their industry
- A baseline understanding of internal inefficiencies
- Insightful questions that resonate

Bonus Tip: Relationship is everything. Our pre-call research always includes looking for connection points:

- Did we attend the same university?
- Have we lived or worked in the same geography?
- Did we share an employer?

Establishing this common ground early creates trust, sets the tone, and is ***always*** what I open with.

Phase 1: Clarify the Call Purpose

The first impression matters.

> "Our goal today is to explore your AI roadmap and ambitions, identify 1–2 opportunities where automation could drive real business outcomes, and determine whether a partnership makes strategic sense."

Key Moves:

- Introduce yourself with a quick 90-second credibility snapshot
- Explain how we operate differently: **strategic partner, not just a vendor**
- Share the meeting agenda, ask if this sounds good or if anything is top of mind – on a successful discovery call, **the prospect is talking 75% of the time**.

Key Opening Question:

> **"How bullish are you on AI?"**

This is the **single most important buying signal.** Based on their response, we typically see two paths:

1. High-Buy-In Customer

- Shares their AI vision or existing roadmap
- Expresses urgency around implementation
- Mentions competitive pressure or experimentation with AI
    - Oftentimes, they've engaged with Nate's content, already have an n8n account, and have experimented building some things out where they quickly realized how complex and time-consuming taking a build into production actually is.
- Keeps up with latest AI trends and news

✅ **This is the strongest buying signal.**

2. Early-Stage Buyer

- Expresses curiosity but no roadmap
- Vague understanding of use cases
- Unsure about implementation timeline
- Generally less knowledgeable about AI

Still qualified and a potential customer, but may need education and vision development. Adjust the conversation accordingly.

Phase 2: Strategic Exploration or Feasibility Review

Depending on their answer to the "bullish on AI" question, you'll take one of two paths:

Path A: They Already Have an AI Agent Roadmap

1. **Dive into their roadmap:**
   - Ask for a walkthrough of their prioritized use cases
   - Understand what they've tried before and why this drives ROI to their organization
   - Identify the most urgent or high-impact agents
2. **Live Feasibility Review:**
   - Pull up **n8n wireframes** or **past project workflows** to validate that what they want is technically feasible (this has the most success with folks who are familiar with n8n already because they can visualize).
   - Ask clarifying architecture questions
   - Offer **recommendations for structure, scalability, and integration**
     i. **Really, you want to prove technical competence here more than anything. Take what they've said and what they've already done, and expand on it in new ways that they haven't thought of, utilizing your AI expertise.**

Path B: No Roadmap Yet → Strategic Opportunity Discovery

Use our **4 Pillars of Automation** to identify promising processes:

Pillar	Guiding Question
Repetitive	"What tasks happen the same way over and over again?"
Time-Consuming	"What eats up the most staff time or mental energy?"
Error-Prone	"Where do mistakes or inconsistencies occur?"
Scalable	"Which tasks will get heavier as you grow?"

Also ask:

> "What's the most boring but critical task your team has to do repeatedly?"

Then:

- Document **frequency**, **volume**, **cost**, and **error rate**
- Conduct a **Stakeholder Journey Mapping** for key processes
- Identify **decision points**, **handoffs**, and **potential integration bottlenecks**

Phase 3: Tech Stack and Integration Mapping

You need a clear view of their environment and tech stack:

- What tools/platforms do they currently use?
- Where is their data stored?
- Are there existing APIs or integration challenges?
- How many users need access, and what level of latency is acceptable?
- What data compliance standards (GDPR, HIPAA, etc.) must be met?

Establish baseline expectations for performance, speed, and system architecture. This is absolutely critical as we head into the second phase of the sales cycle.

Phase 4: Budget, Timeline, Authority, & Success Criteria

- **Budget Considerations:**
    - "Based on everything we discussed today, I would ballpark XYZ amount for us to take the build into production. This allows us to achieve the XYZ value add that we discussed. Is that aligned with what you had in mind?"
- **Timeline Priority:**
    - "Is there a deadline or upcoming initiative driving urgency?"
    - "When would you love to see the agent shipped into production??
- **Authority**
    - "Are you the final decision maker, or should we schedule another call with upper management?"
        - *Use common sense here. If you're on a call with the CEO, obviously they're going to have authority. If you're on a call with, let's say, a senior manager, they might have to get the budget approved by their VP or CEO.*
- **Success Metrics:**

- Hours saved/week?
- Error reduction?
- Cost savings?
- Revenue acceleration?
- Employee experience?

These success metrics serve as objective acceptance criteria for the build. Hitting them not only ensures client satisfaction and a strong ROI—it also creates a clear foundation for future case studies, testimonials, and referrals. By tracking performance before and after implementation, we can clearly demonstrate the system's value. Clients don't evaluate in technical terms—they care about profitability: increasing revenue or reducing costs. These metrics are our direct path to proving that impact

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Phase 5: Closing and Next Steps

1. **Summarize Key Findings**

"You're aiming to achieve X by Y. We explored [processes], mapped out workflows, and reviewed what's needed technically to bring this to life."

2. **Secure Second Meeting**
   - Always book the follow-up before you hang up — ideally 2–3 days out

3. **Frame Next Steps:**
   - We'll deliver a high-fidelity wireframe, demo, and feasibility analysis
   - We'll share a proposal with build specs, ballpark timeline, and budget
   - If we are aligned on everything after our demo, we would schedule a kick-off call and get the project rolling!

Final Word

Whether your prospect arrives with a clear roadmap or you help them build it, your job is to:

- Build trust as a guide
- Show technical fluency
- Anchor around ROI
- Keep momentum moving fast

With the right prep and process, this call becomes your #1 tool for closing high-value AI services deals.And if you're hopping on calls with pre-qualified customers, you can see absurdly high close rates for these relative to other industries and custom software solutioning verticals.

Bonus: Most Common Objections / Questions & How We Handle Them

1. Who owns the IP?

> "All intellectual property we build for you is yours. We build on open infrastructure and pass full code control to you, providing robust documentation, user guides, and architectural specs."

2. What about deployment & hosting?

> "We offer 3 options: fully hosted (on our stack), hybrid deployment (on yours but we manage), or full handoff with support."

3. Why this Foundational Model / Database / RAG method / Other Tech Choice?

> "We A/B test different models, embedding strategies, and retrieval pipelines — and present the performance metrics so you're involved in the decision."

4. What happens after the build is complete and deployed?

> "We always build with the long-term in mind — every solution is constructed using modular, production-grade architecture so it can be easily scaled, extended, and maintained. After deployment, we offer flexible paths: continued development, deployment support, or a clean handoff with training and documentation."

5. How do we make sure this doesn't just become another abandoned tech project?

> "Every system is designed to deliver ROI from day one — we focus on measurable business outcomes and ensure key stakeholders are looped in throughout. We also provide user onboarding, adoption tracking, and feedback loops to keep the solution integrated and evolving."

6. How do you handle data privacy and compliance?

> "We take security seriously. Our deployments are run using AWS infrastructure amd structured around your preferred data policies — whether that's on-premise, cloud-isolated, or compliant with GDPR/HIPAA. We minimize data storage, enforce access control, and document all protocols clearly."

7. Can we start small and expand later?

> "Absolutely. Our architecture is modular by design — we often start with one high-impact process, prove ROI, and then scale into additional automations. This phased rollout ensures clarity, value, and confidence at every stage."

Let’s turn every discovery call into the first step of a six-figure deal.