

Playbook

SolveWorks Discovery + Demo Call Playbook

For: Brody (and anyone running prospect calls) **Format:** One 30-minute call — discovery first, live demo second **Goal:** Prospect leaves having SEEN the product do real work for their business. Proposal follows within 24 hours. **Audience:** Business owners and executives running \$1M–\$50M+ companies. These are sharp operators — respect their intelligence, don't oversimplify.

! THE #1 RULE — Read This First

NEVER fabricate or estimate savings, ROI, or projections without real data from the discovery call.

We learned this the hard way. Inflated numbers kill credibility instantly with sophisticated buyers. If you don't have real numbers from the call, say “we'll spec that out in the proposal based on what you've shared.” Underestimate > overestimate. Always.

Before the Call (5 min prep)

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Google the prospect + their company (2 min)

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Check LinkedIn — role, company size, industry, revenue if visible

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Note if they came through YPO, a referral, or inbound (adjust tone accordingly)

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Have Mission Control open and ready (solveworks.io/mission)

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Have a “live task” ready based on their industry (see cheat sheet below)

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Open their email thread — reread what they've already told us

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If referred: know who referred them and mention it naturally

Know before you dial: Their name, company, what they do, approximate scale, and who connected you.

The Call Structure

Part 1: Open + Discovery (10 min)

Opening (1 min): > “Hey [name], thanks for making time. I want to keep this tight — I’ll ask a few questions to understand where you’re at, then show you something live that I think will click. Sound good?”

No small talk unless they initiate. Respecting their time = instant credibility with executives.

If they were referred: > “[Referrer] mentioned you might be a good fit — I can see why. Tell me about [company].”

Discovery Questions (9 min):

Ask in this order. Stop when you have enough — you don’t need all of them. With senior executives, questions 1, 2, and 5 are usually enough.

1. **“Walk me through what your day looks like operationally. Where does the most time go — for you or your team?”**
 - This is the #1 question. Let them talk. Take notes.
 - With execs: listen for delegation bottlenecks, things that hit their desk that shouldn’t, operational blind spots
 - With operators: listen for email, scheduling, data entry, follow-ups, reporting, research
2. **“What’s the one thing that — if it just handled itself — would change your week?”**
 - This reveals the pain point you demo. Executives think in terms of leverage, not tasks.
3. **“What’s your current tech stack? CRM, comms, project management?”**
 - Tells you what to integrate. Also reveals sophistication level.
4. **“Have you tried any AI tools? ChatGPT, Copilot, anything like that?”**
 - If yes: “What worked? What didn’t?” (Usually: “It’s cool but I have to babysit it.”)
 - If no: Good — clean slate.
5. **“How many people touch admin work that’s below their pay grade?”**
 - This is the ROI question. Write down the number and their approximate rates.
 - DON’T calculate ROI for them on the call — just collect the data. The proposal does the math.
6. **“How sensitive is your data? Client info, financials, anything regulated?”**
 - Seeds the local-first security story. With YPO-level prospects, this almost always matters.

While they talk — write down: - The specific pain point (demo this) - Tools they mentioned (integration targets) - Any numbers they share (hours, headcount, rates) - Their language — use their exact words back to them in the proposal

Part 2: Transition (30 seconds)

“I’ve got a clear picture. Let me show you what this actually looks like — not a pitch deck, real work happening in real time.”

Share your screen. Pull up Mission Control.

Part 3: Live Demo (15 min)

This is where the deal is won. Everything before this is setup.

Open with Mission Control (2 min): > “This is Mission Control — every client gets one. It’s your window into everything the agent is doing. Tasks, activity, documents — full visibility, real time.”

Click through: Dashboard → Activity → Tasks → Agents. Don’t linger — just show it exists and it’s real.

“Think of this as your AI team’s operating system. You can see what it’s working on, what it’s completed, and intervene anytime.”

Then do a LIVE task based on their pain point (8 min):

This is the holy shit moment. Pick from the cheat sheet below based on what they told you in discovery.

They said...	You demo...
“Email is killing me/us”	Agent triages a sample inbox — drafts responses, flags urgent items, summarizes threads
“Research takes forever”	Live competitor research — “Give me your top 3 competitors” and watch it work
“Follow-ups fall through cracks”	Automated follow-up sequences, CRM updates, nothing slipping
“Scheduling is a nightmare”	Calendar management, meeting prep briefs, automated confirmations
“Reporting wastes so much time”	Generate a report from their industry context in real time
“Lead gen / prospecting”	Auto-identify prospects matching their ICP, draft personalized outreach
“Data entry is mind-numbing”	Document → system automation, zero manual input
“I’m the bottleneck”	

They said...	You demo...
	Show delegation: tasks assigned to agent, status updates, completion without intervention

Key rules for the demo: - Do something REAL with THEIR context — not a canned demo - Use their industry, their competitor names, their language - Let silences land after impressive moments — don't narrate over the wow - If something takes 30 seconds to process: "It's pulling from three sources and cross-referencing right now..." - If something fails (it happens): "That's the thing — when it breaks, we see it and fix it. You don't manage this, we do."

Show the result (2 min): > "That took [X] seconds. What would that cost you in human hours? And this runs 24/7 — nights, weekends, holidays."

The Deployment Story (3 min):

This is a key differentiator. Don't rush it.

"Here's what makes this different from every other AI tool out there. This isn't a cloud app. We deploy a dedicated machine — a Mac Mini — into your office. It connects to your systems, runs your agent, and your data never leaves your building."

"No shared servers. No data going to OpenAI or anyone else for training. Your client lists, your financials, your emails — they stay on hardware you physically own, in your office."

"We build it here, configure everything for your workflows, ship it to you. You plug in power and ethernet. That's it."

For regulated industries or privacy-conscious execs, add: > "For businesses handling sensitive client data — legal, financial, healthcare — this is the only architecture that makes sense. Your compliance team will love it."

Don't oversell security — state facts and let them react. Sophisticated buyers know what this means.

Part 4: Close (5 min)

Pricing — be direct and confident:

"Here's how it works. \$1,500 one-time setup — that covers the hardware, the custom build, everything configured for your business. Then there are two monthly options:"

"Option A: \$250/month. We manage everything — updates, new skills, optimization, support. You handle your own AI provider costs, which run \$20-100/month depending on usage."

"Option B: \$450/month. Fully managed. Same as above, plus we cover all AI and API costs. You don't think about it, you just use it."

Pause. Let them respond.

If they ask which you recommend: > “Most clients go with the \$450 — they don’t want to think about API keys and usage. But if you’ve got a technical person on your team, Option A saves money.”

If they compare to hiring: > “A part-time admin is \$2,500-4,000/month minimum, works business hours, takes vacation, and you manage them. This is \$250-450, runs 24/7, and we manage it for you.”

The close: > “I’ll send you a proposal tomorrow that’s built around exactly what we talked about — [reference their specific pain point in their words]. If it looks right, we can have you running in about a week. Sound good?”

Don’t push. The demo did the selling. The proposal closes.

If they want to move fast: > “We can get you onboarded this week. I’ll send the proposal today — once you sign off, we start the build immediately.”

Objection Handling

“That sounds expensive” > “I get it. Let me ask — what did you say you’re spending on [their pain point] in human hours right now? Even at entry-level wages, that’s usually \$3,000-5,000/month in labor for the tasks we just showed. This is a fraction of that, and it doesn’t call in sick.”

(Only use specific numbers if THEY gave you the data. Otherwise keep it general.)

“I need to think about it” / “Let me talk to my partner” > “Of course — I’ll send the proposal so you have everything in front of you. Quick question: what would need to be true for this to be a yes?”

(This reveals the real objection. Address that, not the surface excuse.)

“What about data security / compliance?” > “That’s actually the main reason we built it this way. The hardware sits in your office. Your data never touches a cloud server — no shared infrastructure, no third-party training on your data. You own everything, physically. If you unplug it, it’s off. We can walk your IT or compliance team through the architecture — it’s straightforward.”

“Can’t I just use ChatGPT?” > “You can, and it’s great for one-off questions. The difference is: this connects to your actual systems — your email, your CRM, your files. It runs autonomously, handles workflows end to end, and works while you sleep. And your data stays in your building instead of being sent to OpenAI’s servers. ChatGPT is a tool. This is an employee.”

“How is this different from [competitor / other AI tool]?” > “Three things. One — it runs on your hardware, not someone else’s cloud. Your data stays yours. Two — it’s custom-built for your business, not a template. Three — we manage it. You don’t hire a developer, you don’t configure anything, you don’t troubleshoot. We do. It’s the difference between a SaaS login and having a team that builds and runs your AI operation for you.”

“What if it breaks / makes mistakes?” > “It will, occasionally — like any team member. The difference is we see everything in real time through Mission Control. When something needs adjustment, we fix it remotely, usually before you notice. That’s what the monthly management covers — we’re watching, optimizing, and improving continuously.”

“We’re not very technical” > “That’s exactly who this is for. You’ll never touch a config file or terminal. You interact with your agent like you’d message an assistant — plain English. And when something needs to change, you tell us and we handle it.”

“I want to start small / test it first” > “That’s how every client starts. We pick the one workflow that’s costing you the most time, nail that first, then expand. The setup covers one core use case — we add more as you see results.”

Post-Call Checklist

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Send “great meeting you” text/email within 1 hour

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Draft proposal using ONLY data from the call — no fabricated numbers

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Use their exact language and pain points in the proposal

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Send proposal within 24 hours — NOT 48, NOT “early next week”

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If they gave you numbers: include ROI calculation. If not: frame as “to be validated during onboarding”

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Schedule follow-up for 3 days after proposal sent

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Log everything in CRM / tracking

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Let Dwayne know how it went (quick summary in Solveworks Ops)

Industry Cheat Sheet — Pre-loaded Demo Moves

Staffing / Recruiting

- Auto-identify candidates matching criteria from job boards and LinkedIn
- Draft personalized outreach sequences at scale
- Schedule interviews, send confirmations, handle rescheduling
- CRM pipeline updates — candidate moves stages automatically
- Weekly hiring pipeline report generated automatically

Construction / Trades

- Bid/proposal generation from project specs
- Subcontractor follow-up automation
- Project status reporting from scattered inputs
- Invoice and payment follow-up sequences
- Safety/compliance document management

Professional Services (Law, Accounting, Consulting)

- Email triage — flag urgent client communications, draft responses
- Meeting prep — pull relevant docs, summarize history before each meeting
- Time tracking reminders and billing automation
- Client follow-up sequences with personalized check-ins
- Document drafting from templates + context

Retail / E-commerce / Distribution

- Inventory monitoring and reorder alerts
- Customer service email handling with brand voice
- Competitor price monitoring and market intel
- Vendor communication and order tracking
- Sales reporting and trend analysis

Hospitality / Restaurants

- Review monitoring — draft responses across all platforms
- Vendor follow-ups and order tracking
- Staff scheduling coordination
- Daily/weekly operational reports
- Event booking and follow-up management

Real Estate

- Lead follow-up sequences (speed to lead is everything)
- Property matching — new listings to buyer criteria
- Transaction coordination — deadline tracking and document management
- Market comp reports generated on demand
- Open house follow-up automation

General / Any Industry

- Competitor research (works for everyone — impressive live demo)
 - Email triage and intelligent response drafting
 - Calendar + scheduling automation
 - Report generation from any data source
 - Meeting prep and follow-up management
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Client Proof Points

Use these when credibility matters. Real clients, real results.

Drew M. — Entrepreneur > “Within the first day, it had live lead scanners running, pulling Canadian expansion signals — automatically, every morning. It set up dividend research with analyst targets and price averages. It analysed my call recordings and gave me real coaching feedback. Within the first day. If you’re an entrepreneur wearing multiple hats at once, this is the closest thing I’ve found to a real chief of staff. Highly recommend.”

Dwayne S. — Runs 3 Businesses Simultaneously > Uses one agent to manage operations across a fashion agency, wine import company, and AI consultancy. Inventory management, partner dashboards, meeting follow-ups, competitive research — all handled autonomously.

(Add new testimonials as they come in. Real quotes only — never fabricate.)

Mindset Reminders

- **You’re not selling software. You’re selling time back.** Every executive’s scarcest resource.
 - **The demo sells. The proposal closes. You facilitate.** Don’t pitch features — show real work.
 - **Match their energy.** If they’re analytical, go deeper on architecture. If they’re visionary, paint the picture of what’s possible. If they’re skeptical, stay factual and let the demo speak.
 - **These are peers, not prospects.** YPO members and business owners respect directness and competence. No corporate buzzwords, no overselling. Show them what it does and let them decide.
 - **Silence is your friend.** After the demo moment, after stating the price — shut up. Let them process. The first person to talk loses.
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