SolveWorks Discovery Call Template

For: Brody | **Purpose:** Get real data for credible proposals | **Duration:** 20-30 min

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> ⚠️ **THE #1 RULE: Never guess numbers. If they don't know, write "unknown" and move on.** A past proposal had savings projections higher than the client's actual expenses. That kills trust instantly. Every number in our proposals must come directly from this call.

Before the Call

You already have their AI Audit quiz answers (15 questions). **Review them.** Reference specific answers during the call — it shows you paid attention and skips redundant questions.

Mindset: This is two small business owners having a conversation, not a sales pitch. You're figuring out IF and HOW we can help. Some people won't be a fit. That's fine.

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1. OPENER (2 min)

Goal: Set the tone. Casual, human, not salesy.

> "Hey [Name], thanks for booking this. I checked out your audit answers — really interesting stuff. Before I jump in, mind giving me the quick version of what [Business Name] does?"

Then ask:

- **How long have you been running this?**
- **How many people on your team?** *(including part-time, contractors, VAs)*
- **Roughly what revenue range are you in?** *(Don't push if they dodge — note it and move on)*

💡 *Why this matters: Team size and revenue tell us if $450/mo is realistic for them and how complex their operations are.*

NOTES: | | | |—|—| | Business | | | Industry | | | Years running | | | Team size | | | Revenue range | |

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2. CURRENT TECH STACK & COSTS (5-8 min) 🎯

Goal: This is THE money question. Build the "you're already spending this" case.

> "Let me ask you something most people have never actually added up — what software and tools are you paying for every month to run your business?"

Walk through each category. Write down the tool AND the monthly cost:

Category	Tool	Monthly Cost
CRM / contacts		$
Email marketing		$
Scheduling / booking		$
Social media tools		$
Invoicing / payments		$
Project management		$
Website / hosting		$
Chat / messaging		$
Analytics / reporting		$
AI tools (ChatGPT, etc.)		$
Other: __________		$
Other: __________		$
TOTAL		**$_______**

How to ask naturally:

- *"Do you use anything for managing contacts or leads? Like a CRM or even just spreadsheets?"*
- *"What about email — Mailchimp, Constant Contact, anything like that?"*
- *"How do people book with you — is there a scheduling tool?"*
- *"Any project management stuff? Trello, Asana, Monday?"*
- If they say "I don't know the exact cost" → *"Ballpark is fine — $20 range? $50?"*
- If they truly don't know → write "unknown" — **do NOT estimate for them**

💡 *Why this matters: If they're spending $300-500/mo on disconnected tools they still manually operate, our $450/mo isn't a new expense — it's a consolidation. This reframes the entire conversation. If they spend almost nothing on tools, they're probably not our client.*

🔑 **KEY NUMBER → Total current monthly tool spend: $________**

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3. PAIN POINTS — IN THEIR WORDS (5 min)

Goal: Hear what actually frustrates them. Don't lead them.

> "What's the thing that eats up the most of your time that you wish you didn't have to do?"

Follow-ups:

- **"Walk me through what happens when a new lead comes in."** *(How fast do they respond? What falls through cracks?)*
- **"What's the most annoying part of your week — the stuff you dread doing?"**
- **"Have you ever lost a customer or a deal because something slipped?"**
- **"If you could hand off one thing tomorrow and never think about it again, what would it be?"**

Write their exact words — we'll use them in the proposal.

💡 *Why this matters: People buy to fix pain they already feel, not theoretical improvements. Their words go directly into the proposal so they see themselves in it.*

NOTES (use their language):

Pain point	Their words
Biggest time waste	
What frustrates them most	
What falls through cracks	
Thing they'd hand off first	

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4. ACTUAL NUMBERS (5 min)

Goal: Get real data points. No guessing. If they don't know, write "unknown."

> "I want to make sure anything we put together for you is based on real numbers, not guesses. So let me ask a few specifics…"

- **How many leads/inquiries do you get per month? _________**
- **How many of those turn into customers? _________**
- **What's your average response time to a new lead? _________**
- **How many hours/week do you spend on admin tasks? _________** *(scheduling, email, data entry, follow-ups)*
- **How many hours/week on social media / marketing? _________**
- **Do you have any idea how many leads go unanswered? _________**
- **What does one new customer typically worth to you? _________** *(lifetime or annual — either works)*

If they say "I don't know": > "Totally fair — that's actually really common. Let's skip it and we won't guess either."

💡 *Why this matters: These numbers go directly into ROI calculations in the proposal. Bad numbers = bad proposal = lost credibility. "Unknown" is infinitely better than a made-up number.*

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5. CURRENT PROCESSES — A DAY IN THEIR LIFE (3-5 min)

Goal: Understand how work actually gets done today.

> "Take me through a typical Monday morning. You sit down — what do you do first?"

Listen for:

- [ ] Manual data entry between systems
- [ ] Copy-pasting between tools
- [ ] Forgetting to follow up
- [ ] Things that depend on one person remembering
- [ ] Stuff written on paper or sticky notes
- [ ] "We used to do that but stopped"
- [ ] Tasks that could be automated but aren't

NOTES:

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Morning routine:


Lead handling process:


Customer follow-up process:


Recurring weekly tasks:
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💡 *Why this matters: This tells us exactly what the AI agent needs to do. It's the blueprint for the build.*

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6. DECISION INFO (2 min)

Goal: Know who decides, when, and what could block it.

- **"Besides you, is anyone else involved in making this kind of decision?"**

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- **"Is there a timeline you're working with — anything driving urgency?"** ________
- **"Have you looked at other solutions, or is this the first conversation?"** ________
- **"Any concerns or hesitations I should know about upfront?"** ________

💡 *Why this matters: Avoids the "let me check with my partner" black hole. If there's a co-decision-maker, we may need to loop them in.*

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7. CLOSE THE CALL

> "This is really helpful. Here's what happens next — I'm going to take everything you told me and build out a custom proposal. It'll show exactly what your AI agent would do, what it replaces, and how the numbers work based on what you just shared. No made-up savings, no inflated projections — just what's real. I'll have that to you by [date]. Sound good?"

Set the follow-up: - [ ] Proposal delivery date: ________ - [ ] Follow-up call booked? Y / N — Date: ________ - [ ] Anyone else to include? ________

🚩 RED FLAGS — Signs This Isn't a Fit

Red Flag	What It Means
Spends almost nothing on tools ($0-50/mo)	Hard to frame as consolidation. $450/mo feels like a big new expense.
"I don't really use technology"	Adoption risk is high. They may not use what we build.
Team of 1 with very low revenue	Might not have budget. Tread carefully.
Wants a silver bullet, not a tool	Expects AI to magically fix a broken business model.
Can't articulate any pain points	If nothing hurts, nothing gets bought.
Pushes hard on price before understanding value	Price shoppers rarely stick.
Won't share any numbers at all	We can't build a credible proposal without data.

If you spot 2+ red flags: Still be helpful, finish the call professionally, but flag it internally before we invest time on a proposal.

📋 POST-CALL CHECKLIST

☐ Total monthly tool spend calculated: $________

- [ ] At least 3 real pain points captured in their words
- [ ] Lead volume and conversion numbers (or marked “unknown”)
- [ ] Process walkthrough completed
- [ ] Decision-maker(s) identified
- [ ] Follow-up date set
- [ ] Red flags noted (if any): ________
- [ ] Quiz answers cross-referenced with call notes

Save these notes — they feed directly into the proposal builder.

Remember: A honest “this might not be the right fit” builds more trust than a forced sale. The right clients sell themselves once they see the numbers.