

Chapter 2: The Art of the Discovery Call: Be the Doctor, Not the Drug Dealer

Alright, so yesterday we walked through the basics and the core concept of AI consulting. We established the fundamental positioning that will determine your price, your survival rate, and whether you build a real business or a temporary hustle.¹

That positioning all comes down to a single choice.

On one side, you have the "AI Drug Dealer." This is the person who hears a client's pain point and immediately thinks, "I've got the sexiest, best-looking solution that will wow you".¹ They're not focused on the client's actual problem; they're focused on pushing their "go-tos" that they're familiar with.¹ Many people in this market optimize for this because, just like in the real world, being a drug dealer can be very profitable in the short term.¹

On the other side, you have the "AI Doctor." This is the path we aspire to take.¹ The Doctor doesn't push solutions. The Doctor *diagnoses*. The Doctor provides a *prognosis*.¹ This approach is also very profitable, but it's a long-term game. It's built on trust, and it's built on *actually* focusing on what the client's true pain points are, not just trying to get the call over with.¹

Yesterday was the "Why"—the core philosophy of honest positioning.¹ Today is the "How."

This chapter is the tactical execution of that philosophy. The discovery call is the AI Doctor's examination room. This is where you move from theory to practice, and it all starts in the first 30 seconds of the call.

The First Test: "So, How Do You Run These Things?"

The call connects. You see the client's face pop up. And often, they look a little confused.

You have to remember, discovery calls are confusing to people. They are "not very consistent from one vendor to the next".¹ Some are free. Some are paid. Some are high-pressure sales

pitches. Some are aimless chats.

Because of this confusion, the client will almost always ask you a "very common question":

"So, how do you usually run these things?".¹

This question is a test. It's a test of authority. The client is subconsciously looking for an expert to lead them. The AI Drug Dealer fumbles here. They become passive. They say, "Uh, whatever you want to talk about is fine," and cede all control.

The AI Doctor has a script. This script is a power move. It's designed to instantly establish three things: you are prepared, you are focused on *their* problem, and you are here to diagnose.

Here is the script I use every single time. When they ask how I run things, I say:

"My goal is to fix whatever your pain point is, or go through what your goal is. Or both. I already read what you wrote in the Calendly or the email, so I've briefed myself on your company and have a decent idea of what you do. But I would love to hear in your own words: what are the day-to-day pain points you, your team, and your company are dealing with?".¹

Let's break down why this works. In one short response, you've immediately proven you are not a time-waster:

1. **You are Prepared:** "I already read your Calendly notes..." This is critical. You've done your homework.
2. **You are Focused:** "My goal is to fix your pain point..." Your goal is aligned with theirs, not with your own sales quota.
3. **You are Diagnostic:** "...I would love to hear in your own words..." You are listening *before* you prescribe.

You've just passed the first test. You've established yourself as the Doctor.

Visual Call-out: The Opening Gambit

The AI Drug Dealer (Passive)	The AI Doctor (Diagnostic)
"Uh, however you want to start is fine."	"My goal is to fix your pain point or help you reach your goal."

"What do you want to get out of this call?"	"I already read your Calendly notes and briefed myself on your company."
"So... tell me about your business."	"I'd love to hear in your own words: what are the day-to-day pain points you, your team, and your company are dealing with?" 1
Effect: You sound unprepared, passive, and put all the work on the client. You've lost control.	Effect: You are prepared, focused on their problems, and diagnostic. You have taken control of the examination.

The Prime Directive: The Paid Call Rule

Now, a quick but critical aside. There is one responsibility you have, *especially* if this is a paid call.¹

Let's say you're on a 30-minute paid call. You ask your opening question, and the client just... talks. They spend the first 10 minutes walking through their business, their history, their team drama, and their pain points. They are, in effect, venting.¹

The Drug Dealer looks at their watch. "That's 10 minutes of my paid time gone. I only have 20 minutes left to 'solution.'"

The Doctor does the opposite. If it takes them 10 minutes to walk through their pain point, "it's your job to be the honest person and extend the call by another 10 minutes".¹

Why? "Because those were 10 minutes of them basically venting to you, not you actually solutioning".¹

Those "venting minutes" are the diagnostic minutes. That's the most valuable part of the call. The client isn't just paying for your solutions; they are paying for an expert to finally *understand* their complex problem.

"If you are in the business of building longterm relationships, which you should be, then don't nickel and dime people that hop on a call with you".¹ By extending the call, you are non-verbally communicating, "Your problem is complex, and I am taking it seriously. The clock is secondary to the diagnosis." This is a powerful trust-builder that justifies the premium "Tier

1" and "Tier 2" pricing we discussed in Day 1.¹

The Diagnostic Framework: Three Questions to Unlock Everything

Once you're past the opening and the client has laid out their initial pain, the discovery phase truly begins.¹

Your goal is not to randomly ask questions. You need a systematic framework. My entire diagnostic process, the "tacit knowledge" I've built from thousands of calls, boils down to a specific funnel of three critical scope questions: Scale, Stack, and Knowledge.¹

The order of these questions is the secret.

1. You *must* ask about **Scale** first. Why? Because a company's size determines its politics, its resources, and its budget. It maps the battlefield.¹
2. You ask about **Stack** second. Why? Because the company's *politics* (which you just learned from "Scale") will determine if changing their tech stack is even *possible*.
3. You ask about **Knowledge** third. Why? Because the **Stack** determines where the data lives and how (or if) you can access it.

An amateur jumps straight to the Stack ("What tools do you use?"). The expert starts at 30,000 feet to understand the entire ecosystem *before* zooming in on the tech.

Scope Question 1: Scale (The Map of the Battlefield)

"The number one thing I like to ask is scale. What kind of scale am I dealing with?".¹

The easiest proxy for this is simply, "How many employees?".¹

Based on their answer, I am already pattern-matching in real-time. I've run this play so many times that each "tier" of company size tells me a story about what I'm about to walk into.¹

- **5-20 employees:** This is a flat hierarchy. Processes are minimal or non-existent. The person you're talking to is likely the final decision-maker.¹
- **21-50 employees:** This is where policies and the first real managers start to appear. The

original "flat" structure is starting to break.¹

- **51-100 employees:** This is Series B or C territory. Real structure is in place. You're not just dealing with a person; you're dealing with a *department*.¹
- **100-500 employees:** Politics emerge. Departments are defined. Silos are forming.¹
- **500-1,000 employees:** This company could be public or a late-stage (Series D/E) startup.¹
- **10,000+ employees:** This is full enterprise. You can expect maximum bureaucracy, defined budgets, and deep political trenches.¹

The key insight is this: "Each one of these typically have a pattern of different resources, different dynamics, different politics, and even investor politics at play".¹

You are not asking about size to be noisy. You are asking because the solution for a 20-person bootstrapped company is *fundamentally* different from the solution for a 200-person VC-backed company, even if their "pain point" sounds identical.

Visual Call-out: Pattern-Matching: What 'Company Size' Really Means

Employee Count	Typical Structure	Dominant Politics & Dynamics	Key Question for You (The Doctor)
5-20	"Flat hierarchy". ¹	Decision-maker is likely on the call. Extremely cash-flow sensitive.	"Can the owner afford a real solution, or do they need a quick, simple win?"
51-100	"Real structure". ¹	First managers and departments.	"Am I talking to the champion with the budget, or a manager who needs to sell this up the chain?"
100-500	"Defined departments, politics emerge". ¹	Silos are forming. Budget is	"Is my champion a C-suite, or is this a 'Trojan Horse'

		departmental.	situation where leadership will hate me?". ¹
10,000+	"Full enterprise, maximum bureaucracy". ¹	Fixed budgets, red tape, risk-averse, IT has veto power.	"How long will it take just to get an API key? Who is my 'technical ally' to navigate this?". ¹

The "VC-Backed" Cheat Code

This brings me to the most important distinction within "Scale." You must "differentiate between a company... that reports to a board of directors or investors versus one that is bootstrapped".¹

Here is the cheat sheet: "if it's a startup, and it's 50 to 100 employees, and they are VC-backed, there will be money that can be set aside... by the investors to make the company more efficient".¹

This is the most critical financial insight of the call. A bootstrapped company views your fee as an expense—it's coming directly out of their profit. They are cash-flow sensitive.

A VC-backed company views your fee as an *investment*. They are spending *other people's money*.¹ Their only mandate from their investors is to grow fast and be capital-efficient. And right now, "the majority of VCs worship AI like a god of its own" because it promises that efficiency.¹

For the bootstrapped founder, you pitch, "This will save you 10 hours a week."

For the VC-backed founder, you pitch, "This will make your team 30% more efficient, maximizing your burn rate and getting you to your next funding round faster."

For that second pitch, "budget can magically appear if the use cases warrant it".¹

Scope Question 2: Stack (Mapping the Digital Nervous System)

"Stack. That's my number two question. Walk me through what you guys do day-to-day".¹

This is where you inventory their digital tools. But I'm not just passively taking notes. I'm doing live detective work.

"While I'm listening in, I am listening to see are there tools I've never heard of before? If so, while they're speaking, sometimes I will just do a quick perplexity search. 'Hey, does this... have an API endpoint, that's open to developers?'".¹

This is real-time feasibility analysis. The client might not even know what an API is. If I see their core, integral tool doesn't have an API, I'm immediately pivoting my line of questioning: "would they ever be open to migrating from this thing...?".¹ That simple, silent search just turned a future six-month-long dead end into an immediate, strategic conversation.

As I listen, "the way I think about the automation will change in real time".¹ This isn't something I can spoon-feed; it's "tacit knowledge" built from seeing the same patterns over and over.¹

Here are the two most common patterns:

- **Pattern 1: The Google Stack.** They say, "we are... on Google... we use Google drive. We have things like notion, we use Slack".¹
 - **My Diagnosis:** Great. This is the Google ecosystem. Integrations will be easier, and automations will be more straightforward.¹
- **Pattern 2: The Microsoft Stack.** They say, "or we use Microsoft teams or we use Outlook".¹
 - **My Diagnosis:** Red flag. This is often a "public sector organization, not-for-profit".¹ I'm immediately bracing for impact. Dealing with things like "OneDrive, which is the equivalent of Google Drive or Dropbox, permissions and policies of access become a headache".¹ It can be "absolutely, like, sometimes devastatingly painful to do simple things".¹

Hearing "Outlook" or "OneDrive" instantly tells me the project will be slower, more political, and will *require* an "internal IT help" or "technical ally" on their side to get *anything* done.¹ I must factor that friction into the project's timeline and price.

Visual Call-out: The Full Stack Autopsy Checklist

Use this as your note-taking template on the call. You need to map their entire digital

ecosystem.

- [] **1. Comms:** Slack? Teams? Discord?
- [] **2. Docs/Knowledge:** Google Drive? OneDrive? Dropbox? Notion?
- [] **3. CRM:** HubSpot? Salesforce? Pipedrive? (And *how* is it configured?)
- [] **4. Project Management:** Monday? Asana? ClickUp? (Does it have an API?)
- [] **5. Data/BI:** Power BI? Tableau? Looker? A "Google Sheet Empire"?¹
- [] **6. Design:** Figma? Canva?
- [] **7. Dev Tools:** GitHub? Bitbucket? Internal repos?
- [] **8. Database:** Supabase? Firebase? Convex? Postgres?
- [] **9. Meeting Notes:** Fathom? Gong? Fireflies?¹

Why does this depth matter? Because one "gotcha" can kill a project. I'll give you a perfect example: Fathom. "Fathom doesn't have a native API that you can just call. And they've only integrated with Zapier".¹ If you're an n8n specialist and you promise a native n8n automation for Fathom, you've just failed before you've even begun. You "can't do anything about it yourself".¹ You *must* know the integration capabilities of their stack.

The "System Hygiene" Problem: A Critical Detour

This brings me to the single biggest trap you will fall into, and it's not on that checklist. It's a critical detour.

"You also have to remember that these systems or platforms are only as good as the people that set them up, as well as the hygiene in which they use the tool".¹

This is the killer. This is the "uh-oh" moment.¹

I'll tell you a story. We had a client whose sales team used HubSpot. The "core question was, we want to enable sales to do better, we need more revenue, we need to make... their life easier".¹ Sounds perfect. A clear pain point, a good tool (HubSpot), and a revenue-generating goal.

We signed the contract. We got the milestone payment.

"And then you dive into their HubSpot, and you see that their salespeople are commenting their campaigns as zero, zero, one, date, week, that's it... Nothing's differentiated outside of, like, in brackets one, you know, when you copy paste the same file over and over again".¹

That's the "uh-oh" moment.¹

"you regret the moment you accepted that... payment because now they think that you understand the assignment, but you barely understand what's really involved".¹

This is the "garbage truck on fire" we talked about in Day 1.¹ The client *thinks* they have a technology problem ("We need AI"). They *actually* have a *human process* and data hygiene problem ("Our team has no discipline"). Any AI you build on top of data named "zero, zero, one, week (1)" will be completely useless.¹

This is why the Doctor *must* diagnose system hygiene. And this is why "Tier 2 - Prep" (fixing the foundation) is often where you have to start, and where you make the most money.¹

Visual Call-out: The System Hygiene Litmus Test

"These systems or platforms are only as good as the people that set them up, as well as the hygiene in which they use the tool."¹

Garbage In, Garbage Out: The AI Fallacy

- **The Lie:** AI will fix our messy data.
- **The Truth:** AI will only amplify the mess.

POOR HYGIENE

Human Input: 001_week(1)

System: Messy HubSpot DB

AI Automation: ???

Result: Useless, random, or incorrect output.

GOOD HYGIENE

Human Input: Q4_Holiday_Promo_B2B

System: Clean HubSpot DB

AI Automation: "Analyze Q4 B2B promo results"

Result: Actionable, targeted, valuable insights.

Scope Question 3: Knowledge (The Hunt for the "Single Source of Truth")

This brings us to the final and most critical question of the diagnostic funnel: "Where does

your data live?".¹

I'm listening for one of three answers:

1. **Ideal (and Rare):** "It lives in one central repository".¹
2. **Manageable:** "It's scattered, but we know where the pieces are".¹
3. **The Red Flag:** "It is completely disparate and scattered".¹

If the answer is #3, I already know my prescription. "If the answer is the last one... the first exercise will not be an automation, it will not be a vibe coded app... the first exercise is getting your [stuff] in order... so that you are eligible to even benefit from AI".¹

But digging into this "Knowledge" question reveals more than just technical debt. It reveals *political landmines*.

Here's an expert-level anecdote. An amateur consultant would hear a client has a "Google Sheet Empire"¹ and think, "This is chaos." Then they'd hear another client has everything in "Tableau or Power BI"¹ and think, "This is organized."

The expert knows the opposite is often true. "Surprisingly, sometimes it's easier to move off of a Google Sheet Empire than it is off of Tableau or Power BI".¹

Why?

"because some companies have teams, especially offshore teams in India, Pakistan, Bangladesh, that will build all the Power BI reports... And if you try to sever that relationship to migrate it elsewhere, some political things can happen, where that offshore team then holds the company hostage by not giving them all the rights to their own data".¹

This is the "been-there-done-that" wisdom that clients are paying you for. The "Google Sheet Empire" is a *technical* problem. It's messy, but you can fix it. The offshore team holding data hostage is a *political* problem. It's a "red flag" that can be impossible to fix.¹

This discovery call is your "15 minute coffee meeting".¹ You're on a date. You are looking for these red flags to decide if this is a relationship you even want to be in.

Visual Call-out: The Data Political Risk Matrix

	Technically Simple	Technically Complex
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Politically Simple	LOW RISK (e.g., Simple, in-house database)	IDEAL PREP PROJECT (e.g., "Google Sheet Empire" ¹) <i>Messy, but you have permission to fix it.</i>
Politically Complex	NIGHTMARE CLIENT (e.g., Simple tool, but IT locks down all APIs)	HIGH-RISK RED FLAG (e.g., "Power BI run by Offshore Team" ¹) <i>Messy, and you're not allowed to touch it.</i>

The Diagnosis: Prescribing the "Reality Check"

This is the climax of the call. You've asked the three questions. You've mapped the battlefield (Scale), inventoried the weapons (Stack), and identified the landmines (Knowledge & Hygiene).

Now, you must deliver the diagnosis.

Let's look at the typical patient file. Here's "what they present with":

- "they use AI individually, they have no integrations" ¹
- "They have scattered knowledge" ¹
- "they're overwhelmed by options" ¹
- "they want AI to AI-ify everything in their organization" ¹
- "they spend days on LinkedIn looking at people misleading them saying, AI agent builder kills..." ¹

The AI Drug Dealer hears "AI-ify everything" and starts pitching their most expensive agent-builder package.

The AI Doctor knows the real diagnosis. "What they actually need... is they need a reality check".¹

So you give them the prescription: "So, centralize your data, then pick, try, and find true solutions based on where you end up centralizing".¹

This is often where you, as the consultant, can provide an immediate, tangible first step. For example, I might suggest a "neutral ground" strategy. "Maybe they move their entire stack or

all the information to Dropbox. Now, Dropbox becomes, this neutral ground or bridge... to take all that data that will not be stale".¹

This is a brilliant de-risking move. It creates a "blank slate".¹ You are no longer operating *inside* their "garbage truck on fire".¹ You're building a new, clean foundation *in parallel*, which makes your (and their) success infinitely more likely.

Visual Call-out: The AI Doctor's Prescription Pad

PATIENT: [Client Company]

PRESENTING SYMPTOMS:

- Overwhelmed by options¹
- Wants to "AI-ify everything"¹
- Scattered knowledge across platforms¹
- Team uses AI individually, no integrations¹
- Being "misled" by LinkedIn hype¹

DIAGNOSIS: Foundational Data Disarray (FDD), complicated by Hype-Induced-Overwhelm.

PRESCRIPTION (Rx):

1. **A Reality Check.**¹
2. **Centralize All Data.** (e.g., Migrate to a "neutral ground" like Dropbox to create a single source of truth).¹
3. **THEN (and only then)** identify true solutions and build automations based on the new, clean foundation.¹

DOCTOR'S NOTE: "If you get a company's house in order, that is an evergreen and everlasting change. Meaning that's a win on its own."¹

Overcoming the Final Boss: The Budget Objection

You've delivered the diagnosis. You've prescribed "Tier 2 - Prep" (getting their house in order).¹ This is the "boring" but essential work.

And now you face the final boss: the budget objection.

The client says, "yeah, but this might cost us a lot. We're not really budgeting for this in FY2026".¹

The AI Drug Dealer hears this and immediately backpedals, offering a cheaper, "sexier" tool to make the sale. The AI Doctor holds the line.

Here is the reframe:

"I'd kind of call BS on that. Did you budget for losing 200,000 hours of productivity time in FY2026? Because budgets can always be revisited. It doesn't matter if you think you closed your books, everything can be revisited, especially if eventually a lot of these companies will be on the brink because of what AI can do".¹

You are not being condescending; you are "being firm... about the reality of how fast this stuff is going to change".¹

This script is powerful because it links the client's *own fear* (being left behind by AI) to *your prescription* (doing the foundational work). You're using their FOMO—the same emotion the Drug Dealer exploits—to sell them the insurance policy they actually need. "if they don't do the basics now... this is going to be very painful later on".¹

The Final Target: Finding Your "Technical Ally"

You've run the gauntlet. As you end the call, you're running a final check.

- Is the data organized? (Usually no).¹
- Are the processes clear? (Usually no).¹
- Does buy-in exist? (Sometimes).¹
- Is the budget defined? (Depends on urgency and that VC-backing).¹

But there is one last, critical gap to identify. It's the most important one.

"Technical skills is good to know. Do you have anyone, I like to call them a friendly... like an... ally?... someone that is on your team aligned incentives with you".¹

A consultant can have a massive budget, but if you can't get "an API key or getting approval for a seat," the project is dead on arrival.¹ That approval process "will take a week on its own," and in that time, the "relationship will become more stale".¹

Your "technical ally... on the other side of the table" is the person who navigates this internal bureaucracy.¹ They are the human *enabler* of the entire project. They are more valuable than the budget. Finding this person is the *true* final goal of your discovery call.

And that brings us to the next step.

We've now covered the AI Doctor's *technical* checklist. You know how to diagnose a company's Scale, Stack, and Knowledge. But this is only half the battle.

A perfect technical plan will fail instantly if it meets human resistance. The "ally"¹, the "buy-in"¹, and the "politics"¹ are all *human* problems.

Your next job is to diagnose the *people*. You must learn to read the room, identify the political landmines, and spot the red flags that scream "this client will be a nightmare".¹

In the next chapter, we will go through exactly that: the common scenarios that pop up, and how to handle them.¹

Works cited

1. Consulting Playbook Day 2_The Art of the Discovery Call (P1).txt