



Assess

Part 1

Prework

- ❑ Reviewed **Assess** in the Sales process?
- ❑ **Completed** the Assess Scavenger Hunt?
- ❑ **Chosen 1-2 new strategies** to try when prepping for your next discovery call?
- ❑ **Identified a recent customer call** (or portion of a call) that you felt proud of?

Sales Process

NBS Assess Deep Dive



Your Assessment Goals

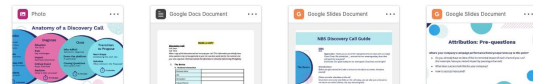
- Determine if the company is a good fit for AdRoll.
- Use SPICED to identify pain points and impact from a diagnostic perspective.
- Uncover 2-3 business objectives that AdRoll can help meet.

You've scheduled the discovery call. It's important to **take time ahead of the meeting to prepare**. The minutes you have during discovery are precious. You need to:

1. Get a well-rounded profile of the company and its current digital marketing strategy.
2. Determine if AdRoll can help the brand solve its most pressing problems.

If you prepare well, you should leave the call with all the information you need to determine your next steps.

Tools of the Trade



SUMMER CAMP SCAVENGER HUNT 2

So, ya think you know Assess...

BEGIN COURSE

SCAVENGER
HUNT

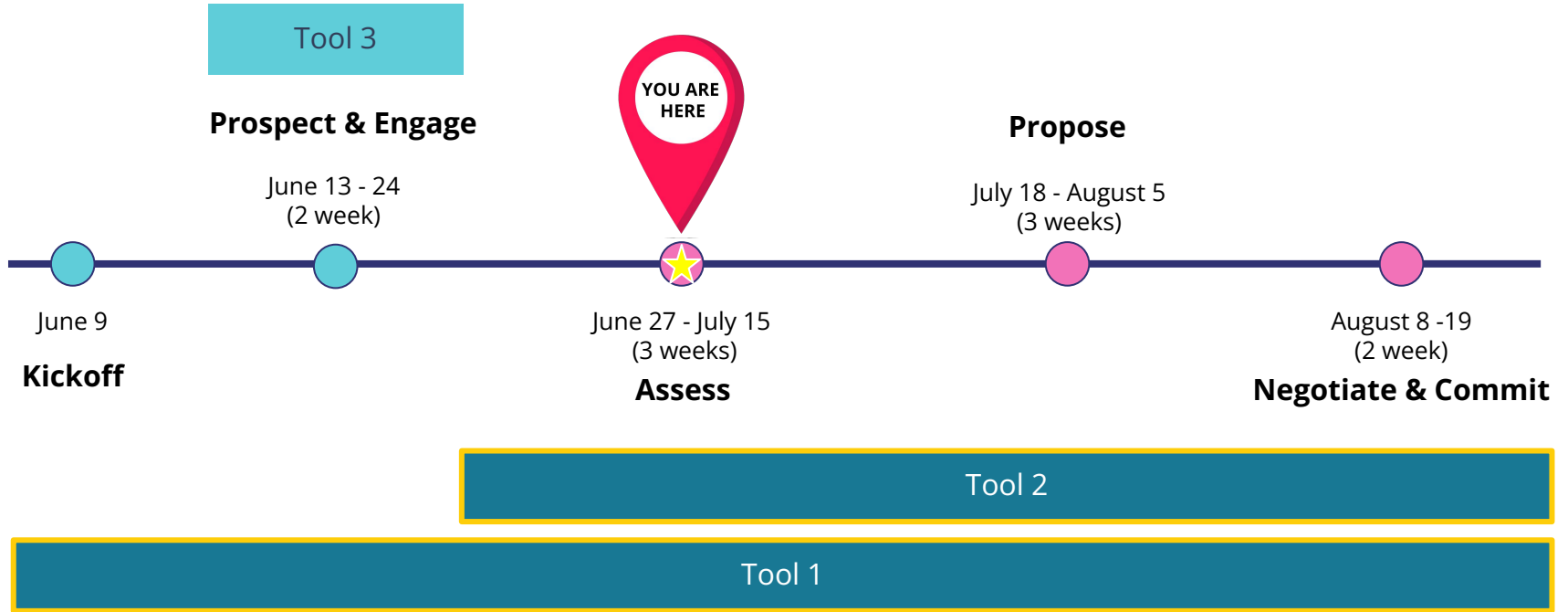
SHOUT OUT!



Hermione Granger

Who won the **most voted share in Prospect & Engage Session**

Timeline



Your Role

- Engage
- Cameras on please
- Be open minded
- Be part of a safe space



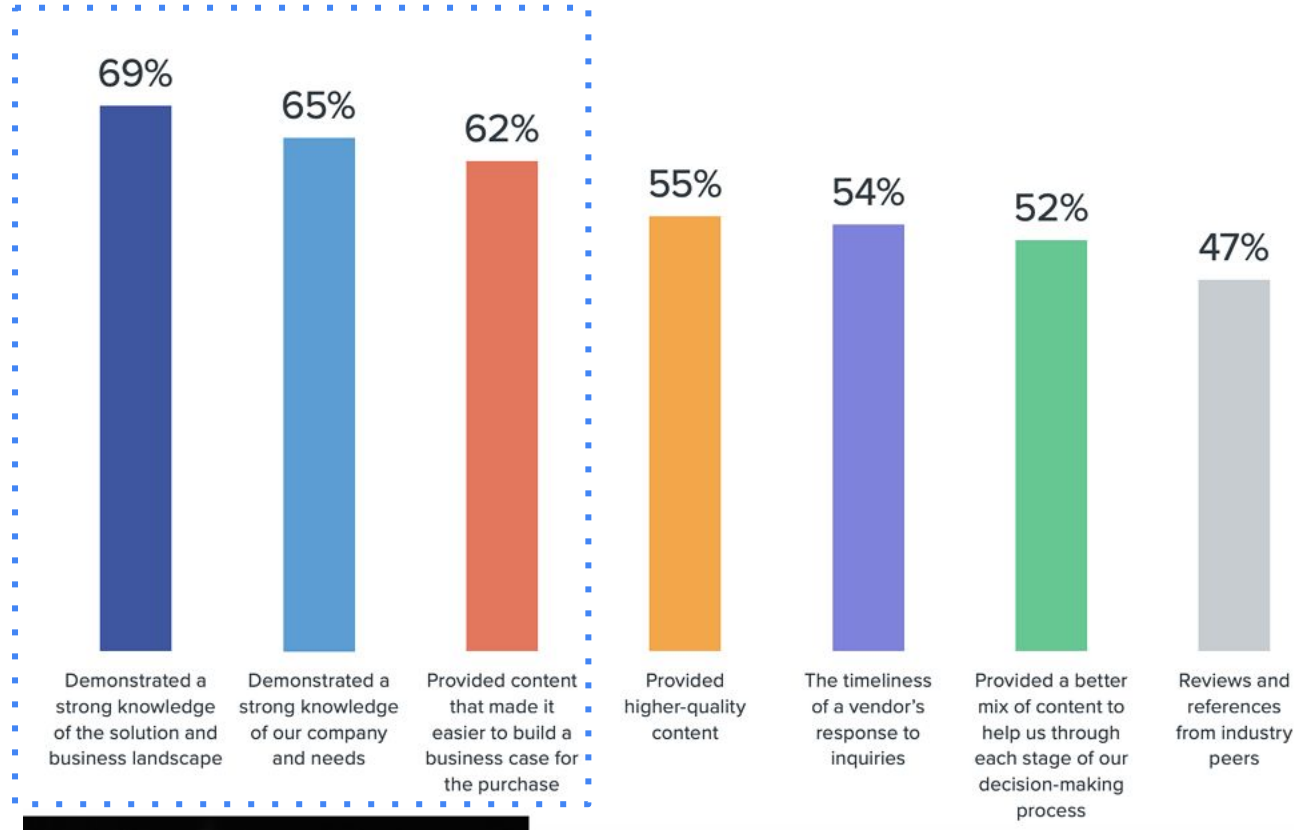
AGENDA

- 1 Warm Up
- 2 Role-Play Relay!
- 3 Role-Play Debrief
- 4 Best Practice

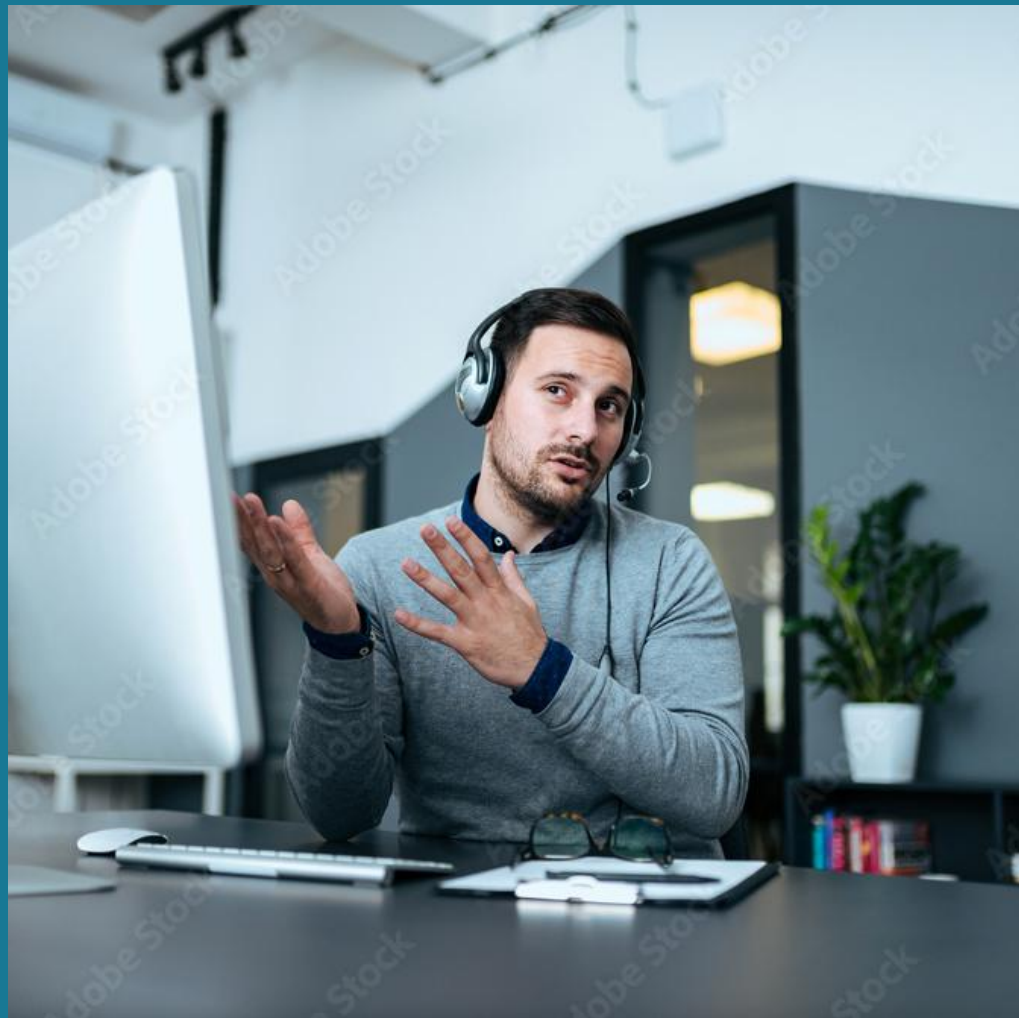


WARM UP!
Showing Up

Please select the top 5 reasons for choosing the winning vendor over other vendors you considered:



TENTATIVE



CONFIDENT



SETTING THE TONE



CUSTOMER-FOCUSED QUESTIONS



Discovery Call - Best Practices

- **Know your goal**
- **Open ended questions..**
- What are you current strategies/goals
- Why did it make sense to take this meeting?
- How do you measure success/what does success look like?
- Success or lack thereof in the past?
- Where are you looking to grow?
- Tell me more...

DISCOVERY CALL RELAY!



HOW IT WORKS

The Discovery Call in 3 parts

Part 1

Opening the Call

- ACE
- Agenda

SPICED

- Situational Questions

Part 2

SPICED

- Pain Questions
- Impact Questions
- Critical Event Questions

Part 3

SPICED

- Decision Questions

Close the Call

Next Steps



HOW IT WORKS

The Players & Workbook



Rep 1



Rep 2



Rep 3

Check your Slack for your workbook

HOW IT WORKS

GROUP 1

GROUP 2

GROUP 3

GROUP 4

GROUP 5

GROUP 6

GROUP 7

GROUP 8

****MAKE A COPY OF YOUR WORKBOOK**

HOW IT WORKS

Switching Roles





Rep 1



**Part 1:
Seller**



**Part 2:
Customer**



**Part 3:
Notetaker**

Rep 2



**Part 1:
Customer**



**Part 2:
Notetaker**



**Part 3:
Seller**

Rep 3



**Part 1:
Notetaker**



**Part 2:
Seller**



**Part 3:
Customer**

During the Role-Play

DO

- Follow Anatomy of a Discovery Call structure.
- Get into your roles.
- Note areas where the conversation went well or missed the mark.

DON'T

- As customer, don't give away inside scoops. Make the seller earn information by asking good questions!
- Goof around. This is your chance to practice the discovery in a low-stakes environment.

Time limit: 10 minutes

Part 1

Part 1

Opening the Call

- ACE
- Agenda

SPICED

- Situational Questions

Part 2

SPICED

- Pain Questions
- Impact Questions
- Critical Event Questions

Part 3

SPICED

- Decision Questions

Close the Call
Next Steps



Rep 1



**Part 1:
Seller**



**Part 2:
Customer**



**Part 3:
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Rep 2



**Part 1:
Customer**



**Part 2:
Notetaker**



**Part 3:
Seller**

Rep 3



**Part 1:
Notetaker**



**Part 2:
Seller**



**Part 3:
Customer**

Get Ready

Read your part



Part 1 Debrief

- **Customers:** What went well?
- **Sellers:** What could have gone better?
- **Note-takers:** What surprised you about the conversation?
- Other comments?

Switching Roles - Part 2



Part 2

Part 1

Opening the Call

- ACE
- Agenda

SPICED

- Situational Questions

Part 2

SPICED

- Pain Questions
- Impact Questions
- Critical Event Questions

Part 3

SPICED

- Decision Questions

Close the Call
Next Steps



Rep 1



**Part 1:
Seller**



**Part 2:
Customer**



**Part 3:
Notetaker**

Rep 2



**Part 1:
Customer**



**Part 2:
Notetaker**



**Part 3:
Seller**

Rep 3



**Part 1:
Notetaker**



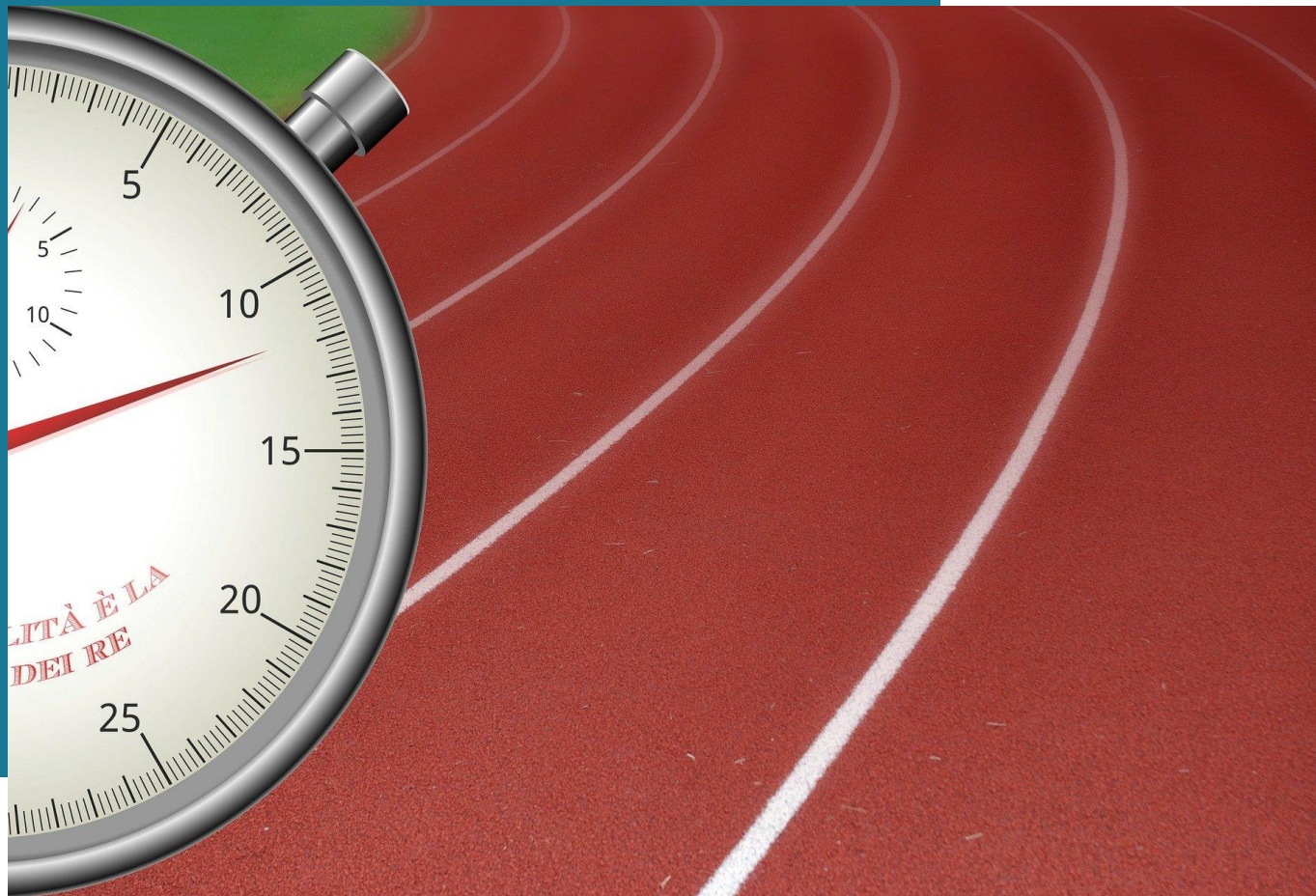
**Part 2:
Seller**



**Part 3:
Customer**

Get Ready

Read your part



Part 2 Debrief

- What went well?
- What could have gone better?
- What surprised you about the conversation?
- Other comments?

Switching Roles - Part 3



Part 3

Part 1

Opening the Call

- ACE
- Agenda

SPICED

- Situational Questions

Part 2

SPICED

- Pain Questions
- Impact Questions
- Critical Event Questions

Part 3

SPICED

- Decision Questions

Close the Call
Next Steps



Rep 1



**Part 1:
Seller**



**Part 2:
Customer**



**Part 3:
Notetaker**

Rep 2



**Part 1:
Customer**



**Part 2:
Notetaker**



**Part 3:
Seller**

Rep 3



**Part 1:
Notetaker**



**Part 2:
Seller**



**Part 3:
Customer**

Get Ready

Read your part



Debrief

- What went well?
- What could have gone better?
- What surprised you about the conversation?
- Other comments?

BEFORE YOU GO



Feedback and **Brightest Shares** of today's session!



EARN YOUR BADGE

- ❑ Completed the Assess Prework
- ❑ Attended today's live session
- ❑ Completed 2 Self-directed Exercises in Gong and Showpad
- ❑ Attend Assess Part 2 live session



**First TWO to earn
their badges**