



Discovery Call Relay!



Rep 1 Packet

Discovery Call Relay!

Your Mission

To uncover sufficient information about the customer, by asking relevant questions about their business, to prioritize their goals, needs, and challenges. Ultimately this information will be used to justify your proposal..

The Format

Complete an entire discovery call, passing the baton at each part. For example:

Part 1: Basics, Situation. Rep 1 = Seller, Rep 2 = Customer, Rep 3 = Note-taker

Part 2: Pain, Impact, CE. Rep 3 = Seller, Rep 1 = Customer, Rep 2 = Note-taker

Part 3: Decision, Close/Next Steps: Rep 2 = Seller, Rep 3 = Customer, Rep 1 = Note-taker

Discovery Call Breakdown and Your Roles as Rep 1

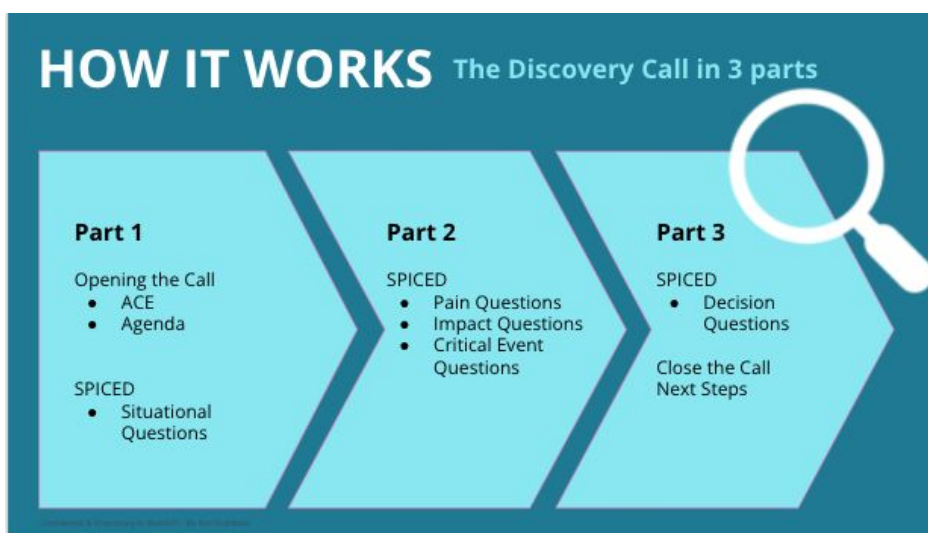
Part 1: Basics (ACE and Agenda) and Situation > You are the **Seller**

Part 2: Pain, Impact, Critical Events > You are the **Customer**

Part 3: Decision, Close/Next Steps > You are the **Note-taker**

In the following pages, you'll be provided the information necessary to successfully play your role as it pertains to each part.

NOTE: The company described in this scenario is fictitious.



Rep 1

PART ONE

Opening the Call

- ACE
- Agenda

SPICED

- Situational Questions

You Are The Seller in Part One

Your Task

To open the discovery conversation with your potential customer using ACE and Agenda, and collect Situational information about the customer's company.

Ultimate Objective

To end discovery with the proposal call scheduled.

The Basics

You've scheduled a 30-minute video chat with the Marketing Director of Sustainable Century, a 5yo California-based furniture company that sells high-end tables, chairs and sofas using ecologically friendly, nontoxic and sustainably sourced materials. According to its website, Sustainable Century has 5 storefronts and a thriving eCommerce business that can deliver cross-country.

Per Tool 1, you've learned that Sustainable Century (SC) has been running its abc campaigns through a competitor and def marketing through someone else. Your outreach to SC focused on New Brand's solid abc performance and xyz services. After two email back-and-forths, the marketing director agreed to meet with you. This was the most recent message:

"Thursday at 10am PT works great for me. I look forward to telling you more about Sustainable Century and what we're looking for from our abc campaigns. While we're currently using Company X, I'm interested in hearing what your company may be able to provide. See you soon!"

Additional Prospecting Details

Proprietary information removed



You Are The Seller in Part One

Discovery Call Checklist for Part 1

The Basics

ACE

- **Appreciate.** I appreciate you taking the time to meet with me/ us today!
- **Check** Time. We scheduled __ minutes for our meeting today, does that still work for everyone?
- **End** Goals. Our goals today are to: insert goals. Does that sound right?

Introductions

- Before we get started, let's take a minute to introduce ourselves. Introduce yourself.
- Since there are some new folks on the call today, can we take just a minute to introduce ourselves? (Name, role, any new end goals). *If there are other attendees on the call.*
- **Agenda** - Brief Overview of your plan for the call.

SPICED: Situation

PRO TIP- *Don't run through the questions like a robot. Make SPICED conversational and allow plenty of time for the client to go into depth if needed- your customer needs to feel heard.*

- Tell me about your current marketing strategy. *Let the customer talk and check off any info they share, to avoid asking them a redundant question.*
 - What is the goal? new customers, conversions, loyalty, etc.
 - How is success measured? conversions per month
 - What's your monthly abc budget?
 - Are you using other platforms? If yes, what are they?
 - What have you tried in the past? Results?
- Which stages of the marketing funnel are best addressed by your current marketing strategy? Which stages need the most strengthening?
- How is credit currently given by channel? Are you able to view the relationships of channels and attribute credit for conversions?
- For your def campaigns, what triggers are you currently using, and do they work with jkl?
- Are you using a xyz platform for your business (i.e EX1, EX2, EX3, etc.)?
- What % of your visitors are using Y and X?
- Who creates your ads and what type of ads are you using?



PART TWO



SPICED

- Pain Questions
- Impact Questions
- Critical Event Questions

You Are The Customer in Part Two

Your Task

To see if New Brand has the technical and personnel capabilities to make SC's advertising efforts yield stronger outcomes.

Ultimate Objective

To determine if Sustainable Century should renew its contract with Company X or switch to New Brand.

The Basics

You are the Marketing Director of Sustainable Century, a 5yo California-based furniture company that sells high-end tables, chairs and sofas using ecologically friendly, nontoxic and sustainably sourced materials. Sustainable Century has 5 SoCal storefronts and a thriving eCommerce business that can deliver cross-country. Your team includes a web/visual designer and a social media /content marketer; you're the strategist and data analyst for the team, managing budgets across multiple campaigns.

You've agreed to a 30-minute video chat with a New Brand sales rep for two reasons:

- Sustainable Century's leadership team wants to **expand the brand's reach** beyond the Pacific West and needs to start seeing increased national purchases before fully building out the logistical infrastructure to serve other regional markets, particularly the East Coast. To meet their real goals, leadership has decided to aim the company towards a minimum **25% revenue growth in the next six months, with a total of 50% growth by EOY**.
- Sustainable Century has been **working with Company X** for the past two years. While campaign performance is satisfactory, leadership has been concerned about SC ads getting placed on low quality websites; that issue, combined with mediocre customer support from Company X's managed services, has you interested in exploring other options.

Additional Details

- **Attribution.** While Company X leans on super-click, you're not opposed to exploring a more multi-touch approach, given the repeated touchpoints usually required for large furniture purchases.
- **200 average monthly conversions at an XYZ of \$2200.** Would like to hit 250-300/month.
- DEF marketing is with **Company Y**, used for jkl and mno campaigns. You're pleased with price and performance and not looking hard for a replacement. GHI rates are typical for the industry, averaging 2.5%.
- Current **ROI** is 3x- you'd definitely be pleased with an bump in ROI, but the key is increasing results without sacrificing much in overall campaign performance. You want to see if New Brand can deliver.
- Your current **JKL** is \$700, but leadership would like to lower it if possible to assist with the logistics costs of longer range shipping.
- Meeting the revenue goals outlined by leadership (25% in 6 months, 50% by EOY) would be extremely beneficial to the company's logistical expansion, and on a personal level would be a major professional accomplishment and likely lead to a considerable bonus.



You Are The Customer in Part Two

Discovery Call Checklist for Part 2 (Seller will be asking you these)

SPICED: Pain

Growth Expectations:

- Talk to me about the growth expectations of Sustainable Century over the next 6-12 months...what has leadership communicated about that expectation?
- How does this goal/expectation compare to the last 12 months? What went well? What didn't?
- How does your current KPI compare to your target KPI?
- What needs to be true for these goals to be achieved? I.e. additional channels, increase scale and efficiencies of existing channels

Attribution:

- What platforms and data sources are you using for attribution?
- How are you using your attribution data to improve your outcomes?
- What attribution model are you using?

SPICED: Impact

- If you were to meet the current growth expectations we discussed, what would that mean for the 1) business 2) your team and 3) you?
- How would a ___% increase in XYZs impact your business strategy?
- How would a ___% increase in MNOs impact your overall revenue goals?
- What happens if the milestones/timelines are not met? 1) business 2) team and 3) you?

SPICED: Critical Event

- What, if any, seasonal events impact your revenue and shape your marketing efforts?
- Are there any impending product launches?
- What, if any, company milestones you are striving to meet? Associated timelines?



PART THREE

SPICED

- Decision Questions

Close the Call

Next Steps

You Are The Notetaker in Part Three

Your Task

To document the conversation between the seller and customer as it unfolds, checking off discovery call must-haves (checklists are below) and making notes on interactions that stand out.

Your Objective

To evaluate this part of the discovery call: was it successful or unsuccessful? Why?

The part of the call you're documenting:

Part 3: Decision, Close/Next Steps

Discovery Call Checklist for Part 3

SPICED: Decision

- What other vendors or platforms are you currently evaluating?
- What needs to come together for a decision to be made?
- How does your buying process work? Who is involved?
- Are there any conversations we should start in parallel?

Close

Remaining Questions and Summary

- Any other questions?
NOTE: If you don't have an answer immediately, it's fine to let the customer know you will get back to them with the answer.
- Telling the New Brand Story
NOTE: The New Brand story is NOT an elevator pitch; it's more of a who are you doing business with?
- Demo the platform?
Only demo the platform if a specific feature has been discussed and the customer is interested in seeing it now. You can always demo at the proposal meeting, where a demo can be used to demonstrate New Brand's value as a usable platform.
- Summarize what was discussed with a focus on your key takeaways: their priorities, challenges, critical events.

Next Steps

- Based on what you've seen today, what's the next step you'd like to take? *OR* Based on what you've seen today, does it make sense to explore pricing options next?
- I can prepare the proposal for you by _____. Do you have 15 minutes in the next day or two when we can meet and walk through the proposal?
- Is there anyone else who you would like to be present for the proposal walkthrough?



You Are The Notetaker in Part Three

Discovery Call Checklist for Part 3 *cont'd*

Close Call

- Thank the attendees for their time.
- Define next steps.
- Close call.

Key Observations-Takeaways

Prompt	Response
Did the Seller get their questions asked and responded to?	
Did the Seller get a proposal call scheduled within the next 1-3 days?	
What was the strongest element in this part of the discovery call?	
What was the weakest element in this part of the discovery call?	
Overall, was Part 3: Decision-Close successful or unsuccessful? Why?	

