

DISCOVERY CALL / DEMO B2B CHECKLIST



PRE CALL PREP



Connected with leads on LinkedIn

Sent over connection requests to those who will be on the call saying "First name, look forward to discussing your X strategy on (insert date).



Punctuality

Were they on time?



Did they share any insightful information before meeting?

Shared a relevant piece of information by email that can help them with their job (e.g. if they are hiring salespeople sharing a blog about the 5 traits to look for in top salespeople)



INTRODUCTION



Camera Turned On

Turned camera on to make the experience more human and as close as possible to face to face



Establish Rapport

Mentioned something about them personally or their company based on research done prior to the call (e.g. congrats on opening a new office in Amsterdam. Will you flying out there to work with the team.)



Agenda and up front contract

Set an agenda of what you will cover on the call, and plant the seed of the next call if there is fit (e.g. first, I'd like to ask you a few questions to better understand X, then I'll show you a bit about our Y, and if we see a good fit, we can book in a next call to discuss Z. How does that sound to you?)



Summary of previous call or form notes (if occurred)

Summarize main points and challenges that were sourced on previous call or form if relevant



Question to understand if anything has changed since last conversation (if occurred)

Asked if anything has changed if it's been 2 weeks or over since you last spoke that would affect our process or conversation today



DISCOVERY OF PERFORMANCE OBJECTIVE OR GAPS

- Question about Performance Objective**
Asked a question about what goal would they like to achieve
- Challenge and gap question**
What challenges are they facing that is preventing them from reaching their goal?
- Situational question about performance objective**
How are they currently trying to achieve their goal?
- Identification of specific goals, challenges and situation**
Were goals, challenges and situation established
- Impact question**
Did you identify what is the outcome if problem is not solved?
- Active listening**
Did you show you were listening by recapping and mirroring what the prospect told you?
- Probing questions based on answers**
Asked questions around the answers they gave to get into more detail
- Kept answers concise**
Did you answer questions directly and not overshare.
- Refrained from selling**
Did you refrain from talking about your product before you understood the buyer's needs and challenges?



ASSOCIATING PERFORMANCE OBJECTIVE/GAP WITH PERFORMANCE BRIDGE

- Product solution connected to Performance Objective**
Associated product to how it will allow them to achieve their goal
- Educated buyer through industry expertise**
Showed industry authority and knowledge by educating the buyer.
- Solutions presented vs features sold**
Spoke on the outcome of the solution as opposed to what the solution does.



ASSOCIATING PERFORMANCE OBJECTIVE/GAP WITH PERFORMANCE BRIDGE

- Probing question around how buyer would use product**
Engaged lead to help them visualize how they would use solution
- Told relevant customer story**
Told customer story most relevant to who you are speaking with, using specific statistics and mentioning at least the industry of the company. If it's not confidential, mention the persona and company
- Asked about other stakeholders**
Asked question like "Is there anyone else that would be offended if they were not invited to our next meeting?"
- Understand vs overcome objections**
Tried to Understand vs overcome/ignore objection
- Addressed objections**
Presented value of solution VS pushing with no context



LEADING THE CLOSE FOR NEXT STEPS

- Proactively ask for objections**
"What obstacles can you foresee that would prevent us from working together?"
- Left time to discuss next steps**
Did not leave themselves short for time to discuss next steps
- Clearly explained benefits of outcomes**
Tied solution to measurable outcomes to their business
- Booked next steps**
Tried to book next call and explained what they will learn on that call



POST CALL

- Connected with leads on LinkedIn**
Sent over a connection request to influencers in sales cycle. A message that can be included "Great to connect I am having interesting conversation with X" Refer to person you have meeting with.
- Punctuality**
Sent an email to leads, summarizing their goals, challenges and situation, and how your product would help them
- Did they share any insightful information before meeting?**
Before next call, sent the leads a nurture email with educational content to help them with challenges they outlined on the call