

Discovery Call Checklist

Preparation is key to any good discovery call. Use this checklist as the starting point to ensure that you give yourself every opportunity to win

- Understand the purpose of this call
- Prospect has shown a keen interest
- Is there currently a solution
- You have done your research on your prospect
- You have done your research on the organisation
- You have done your research on the industry
- You have an agenda for this meeting
- You have testimonials to support this industry readily available
- You know what your next steps are