

Sales discovery question sheet

Research first, then ask. Pick from each group in order; never read the list out. Do not demo during discovery.

Before the call: your three-line hypothesis

What is likely going on at the account	
What it likely costs them	
Why now	

Opening: share the hypothesis and ask, "How close is that to what you are seeing?"

The questions

Group	Questions
1. Context	• Can I check I have this right: what you sell, who buys it, and how they buy? • How is the team set up, and what has changed over the past year?
2. Objectives	• Which goals matter most to the company this year, and how will anyone know they were hit? • What does your team have to deliver for those goals?
3. Challenges	• What has to be overcome to hit those goals? Why is it hard today? • How long has this been a problem, and what have you tried?
4. How it works today	• Walk me through how this happens today: who, which tools, which data, how often, how long. • What happens when the person who runs this is away?
5. Impact	• What is this costing today, in hours, money, risk or revenue you miss? Even a rough estimate helps. • How would you make the case for this spend to your manager and to finance?
6. Urgency	• Why now? What makes this a priority this quarter? • What happens on [their date] if nothing has changed?
7. Decision and paper process	• What has to happen before a firm yes or no, who takes part, and what will they judge on? • Where would the money come from, and whose signature does it need? What did legal, security and procurement ask for last time?
8. People and alternatives	• Who is pushing for this, and who would be happier if it went away? • What else are you considering, including building it or doing nothing?

After the call: did you...

☐ show research in the first two minutes ☐ state an agenda and outcome ☐ ask why now ☐ quantify one pain with their numbers ☐ explore who signs ☐ avoid product before the problem was framed ☐ let the buyer talk more than you ☐ name a second stakeholder ☐ agree a dated next step