The Discovery Call Playbook

15 Questions to Fuel Your Sales Pipeline

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As a sales enablement pro, your goal is to equip your sales team with practical, impactful resources that support their success. A strong discovery call sets the foundation for a successful sales relationship, uncovering insights that build connections, reveal needs, and open the door to tailored solutions. This playbook provides an essential guide for sales reps to conduct effective discovery conversations. Equipping reps with these targeted questions will empower them to better understand their prospects' unique challenges, positioning your solution as a necessary answer to their needs.

How to use this playbook

This playbook is a quick, digestible asset that can be shared across the sales team as a PDF or printed handout. Integrate it into sales onboarding sessions, quarterly training refreshers, or as part of pre-call checklists. When your reps have straightforward, targeted questions, it streamlines their process and ensures they capture valuable information in every discovery call. This proactive preparation helps your sales team qualify leads effectively, building a stronger, more qualified pipeline.

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Why your sellers will love this playbook

Discovery calls often set the tone for future interactions, and structured preparation is key to making the most of these moments. With built-in best practices, this question guide helps reps go beyond surface-level answers to uncover what matters to each prospect. Consistent use leads to richer customer conversations, better-aligned solutions, and more productive next steps. This supports pipeline health and strengthens individual reps' skills, driving sustained sales effectiveness and growth.

1. Tell me more about your role at [company name].

What you'll learn: Gain insight into your prospect's responsibilities and position in the decision-making process.

Action item: Take note of any decision-making authority or influence, and adjust your messaging based on their level of control over the purchasing process.

2. What challenges are you currently experiencing?

What you'll learn: Use this to determine fit and formulate a tailored solution.

Action item: Identify one area where your solution can directly impact their pain points and mention how your product/service addresses this.

3. Why is this challenge or pain point important to you?

What you'll learn: This digs deeper into motivations, showing if there's urgency or higher-level influence.

Action item: Use their response to highlight specific benefits of your solution that align with their personal or professional motivations.

4. What solution or process are you currently using to address this challenge?

What you'll learn: Understand what they like and dislike about current solutions and position your offer accordingly.

Action item: Note areas where your solution outperforms their current approach and prepare to address common objections around switching solutions.

5. What do you like/not like about your current solution?

What you'll learn: Identifying pain points helps you frame your offer as a superior choice.

Action item: Emphasize how your solution overcomes their dislikes while reinforcing the benefits they may already value.

6. What would happen if you did nothing to address this challenge?

What you'll learn: Start building urgency by highlighting the cost of inaction.

Action item: Present examples or data that underscore the risks of inaction, helping elevate your solution's urgency.

7. Where does this rank on your list of priorities?

What you'll learn: Gauge urgency to know how actively they're looking for a solution.

Action item: Suggest a faster follow-up timeline if it's a top priority. If it's lower, position yourself as a valuable resource when they're ready to move forward.

8. What would solving this problem mean for you?

What you'll learn: Understand what success looks like for your prospect to tailor your value proposition.

Action item: Reiterate how your solution can help them achieve this vision of success, tailoring it to the personal or business gains they've described.

9. Who else wants to solve this problem?

What you'll learn: Identify other stakeholders involved, their needs, and influence levels.

Action item: Note these stakeholders and prepare to address their unique interests in your next communication or demo.

10. Why do these stakeholders care about this problem?

What you'll learn: Understand individual stakeholders' motivations to deliver a tailored experience.

Action item: Craft tailored messaging to appeal to each stakeholder's motivations when communicating with the broader decision-making team.

11. Can you tell me about a time you faced a similar challenge and successfully addressed it?

What you'll learn: Learn about the prospect's preferred approach to problem-solving and anticipate possible objections.

Action item: Identify elements of their solution that worked previously and position your offering as a logical next step that aligns with their approach.

12. If I propose a solution and you're on board, what would we do to make this happen?

What you'll learn: Map out the next steps and potential roadblocks in the decision process.

Action item: Outline a clear implementation path and timeline, and address any steps that could speed up or slow down the process.

13. What is your budget?

What you'll learn: Ensure alignment early to avoid pursuing prospects without viable funding.

Action item: If their budget aligns, plan a solution that closely matches it. If it's too low, provide alternatives or additional value points to help justify a budget increase.

14. What else can you tell me about that?

What you'll learn: This probing question encourages the prospect to share more details and insights.

Action item: Listen carefully for additional context or lesser-known challenges and prepare to tailor your solution accordingly.

15. What questions do you have for me?

What you'll learn: Turn the call into a two-way conversation by inviting the prospect to ask questions.

Action item: Address each question thoroughly and use the opportunity to reinforce your key selling points based on their specific interests.

Discovery call best practices

- **Show up prepared:** Research your prospect thoroughly to demonstrate your knowledge and stand out.
- **Schedule adequate time:** Plan for 45-minute calls to cover all essential points without feeling rushed.
- **Strike a question balance:** Aim for around 20 questions to keep engagement high.
- **Encourage open dialogue:** Allow the prospect to ask questions and share insights.
- **Follow up swiftly:** Act promptly after the call to maintain momentum and engagement.

Elevate your sales discovery calls with Mindtickle

Mindtickle equips your team with tools to master discovery calls. With AI role-plays and conversation intelligence, Mindtickle helps refine discovery skills so you can turn discovery calls into pipeline opportunities.

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