



EBOOK

# HOW TO RUN A SUCCESSFUL *SALES DISCOVERY CALL*

# How to Run a Successful Sales Discovery Call

For [consultative sellers](#), having successful sales discovery calls is essential because they underpin the entire sales process.

These calls provide sellers with an opportunity to deeply understand their buyers' challenges, objectives, and operating environment. In turn, this in-depth knowledge of buyers' needs allows sellers to design solutions that are tailored to fit the unique circumstances of each buyer.

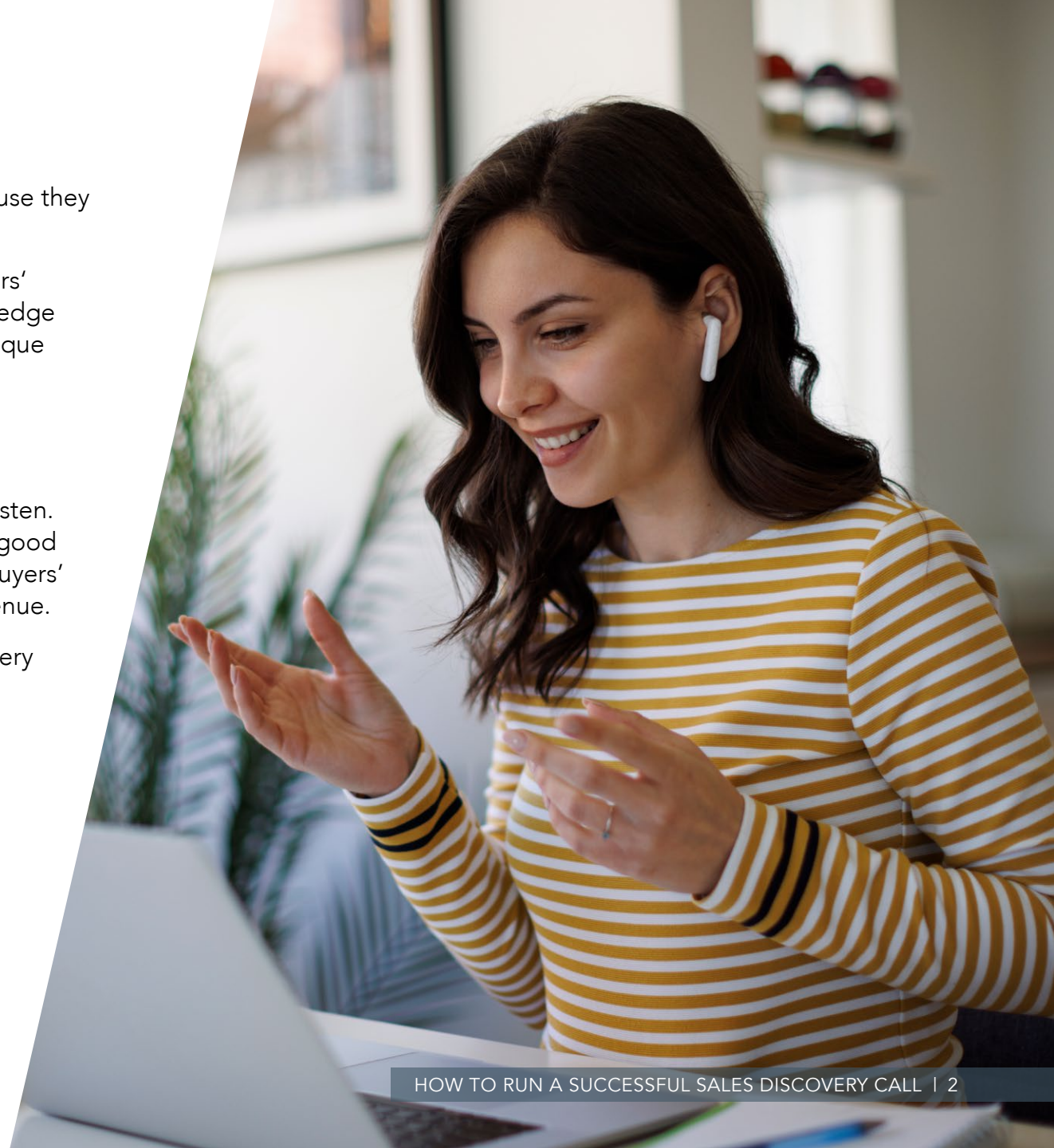
Unfortunately, only 26% of buyers say sellers excel in uncovering their needs, highlighting a gap in sellers' discovery skills.<sup>1</sup>

To fully uncover buyer needs, sellers must ask the right questions and actively listen. But listening is another problem area: only a quarter of buyers consider sellers good at listening.<sup>2</sup> Without effective listening, sellers miss opportunities to address buyers' needs, limiting their ability to offer comprehensive solutions and maximize revenue.

In this ebook, we share how you can conduct a thorough and thoughtful discovery call, one that is collaborative and uncovers the full set of buyer needs.

<sup>1</sup> RAIN Group Center for Sales Research, *Virtual Selling Skills & Challenges*.

<sup>2</sup> *Virtual Selling Skills & Challenges*.





## What Is a Sales Discovery Call?

A sales discovery call is an initial conversation between a seller and a buyer, typically conducted over the phone or online. The primary goal of this call is to gather information about the buyer's needs, challenges, goals, and buying process to determine if there's a good fit between what the buyer needs and what the seller offers.

It's a critical step in the sales process because, in addition to identifying needs, it helps sellers qualify leads, saving time and resources by focusing on prospects who are more likely to convert into customers.

During a discovery call, sellers [ask questions](#) to encourage the buyer to share information about their situation. These questions may cover topics such as the buyer's challenges, desired outcomes, decision-making process, budget, and timelines. The information collected during this call enables the seller to craft solutions that specifically address the prospect's needs.

Effective discovery calls require careful preparation, active listening, and the ability to ask insightful questions that reveal the buyer's afflictions (pain points) and aspirations. How a seller facilitates these calls directly impacts the overall sales process.



# 11 Steps for Leading a Thorough Needs Discovery Call

## Before the Discovery Call

### 1. Prepare for the Discovery Call

Equip yourself with an understanding of the buyer and their business so you can have a more meaningful and productive conversation.

Prepare for the call by:

- **Researching the Buyer's Business:** Gather information about the company, its industry, size, market position, and any recent news or significant achievements. Understand the challenges typical to their industry and how your solutions might address those challenges.
- **Understanding the Buyer's Role:** Know who you'll be speaking with and their role within the company. Understanding their responsibilities, challenges, and key performance indicators (KPIs) will help you tailor your questions and solutions to their specific needs.
- **Identifying Potential Needs:** Based on your research, identify areas where the buyer might need assistance. Even though the discovery call is about uncovering these needs directly from the buyer, having an informed hypothesis can guide your questioning and show the buyer that you've done your homework.
- **Preparing Tailored Questions:** Develop a list of questions that encourage the buyer to talk about their challenges, goals, and the impact of current processes on their business. These questions should not only fill in the blanks, but also provoke thought and reveal deeper insights into the buyer's needs.
- **Knowing Your Solutions:** Be well-versed in the details and benefits of your products or services, including how they've addressed similar challenges for other clients. This knowledge will help you make connections between the buyer's needs and your solutions during the conversation.

By thoroughly preparing for your discovery calls, you not only demonstrate professionalism and respect for the buyer's time, but also position yourself to lead a more effective and engaging conversation. This preparation lays the groundwork for building a solid relationship with the buyer and moving the sales process forward.

## 2. Ask Questions in Advance

Prepare for more productive conversations by using email, or even a survey if it's right for your business, to ask some questions in advance of the discovery call.

When you do this:

- Assuming the buyer responds, you may get more answers than you could gather during a call.
- It can potentially shorten the sales cycle, which means fewer meetings before a purchase decision.
- The buyer engages with you before the call, initiating collaboration before you even meet.
- The buyer may say, "I don't have time to answer these questions right now, but thanks for sending them along. Let's cover them in the meeting." Even when this happens, they may read the questions and begin thinking about them.

In other words, you can move the process along more quickly, get more and better information, and impress buyers. Also, to the extent you can customize your questions for that specific buyer, you build trust and differentiate yourself from the competition.



## During the Discovery Call

### 3. Use a Mix of Needs Discovery Questions

It's easy to ask questions. It's *how* you ask them that's critical. How you ask can determine the needs you're able to uncover. To get the best results from your discovery calls, use a mix of broad open-ended, specific open-ended, and closed-ended questions.

#### Broad Open-ended Questions

These questions get people to open up and start talking.

For example:

- "What's going on in your world these days?"
- "Can you give me some background on what's happening in your division?"
- "Thinking about HR at your company, where do you see the areas of opportunity for improvement?"

#### Specific Open-ended Questions

Some buyers won't share much information when you ask broad open-ended questions. Or they just won't know the answers. That's when you move on to more specific open-ended questions.

These questions uncover latent needs—those needs the buyer may not even be aware of. These specific open-ended questions yield one of three answers: an expression of need, no perception of need, or lack of knowledge.

For example:

- "You've mentioned that you'd like to improve your company's efficiency. There are many ways to go about this. Let's start with billable hours. How closely do your monthly actual numbers align with your projected numbers?"
- "What about staffing? Do your current employees have the skills needed to move the company forward? Where are the knowledge gaps?"
- "What would you like to be doing that you just don't have the resources to tackle right now?"



## Closed-Ended Questions

These questions are great for diagnosis. Whether you get a “yes” or a “no” answer, it’s easy to follow up and get the buyer to elaborate.

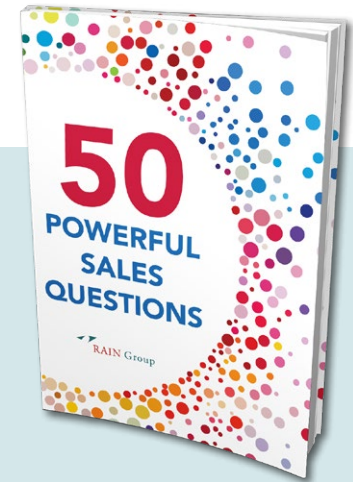
By asking closed-ended questions, you can uncover needs that buyers may not yet perceive as a problem, but when you ask so specifically, they sometimes reconsider.

For example:

- “Do you feel like you’re hiring the best people fairly consistently?”
- “Are you getting the pool of candidates you want when you’re looking to hire, and are you getting them fast enough?”
- “Do you feel like you waste a lot of time sifting through the also-rans to get to the highest potential candidates?”
- “When you make offers, do the best candidates accept them as often as you would hope?”

The idea is to move from general to specific questions, uncovering buyers’ perceptions of their needs, helping them express a broader set of needs, and finding out enough information so you can present ways to improve that drive interest and the desire to act.

➔ **Download the 50 Powerful Sales Questions** ebook to get more examples of questions you can use in discovery calls.



## 4. Ask Both Afflictions (Pain)-Based Questions and Aspirational Questions

Needs discovery starts with identifying a buyer's problems, frustration, pain, irritations, challenges, or *afflictions*. Whichever term you use, you need to learn what issues buyers have so you can determine how you can help.

Uncovering afflictions is a crucial step in the sales process and the reasons are simple: if a buyer communicates their afflictions to you, it's likely they want them to go away. The buyer also must decide if it makes sense to invest the time, money, and brainpower required to get rid of them.

The more openly you discuss afflictions with buyers, the more those afflictions will take front-and-center space in the buyer's mind. Uncovering and discussing one affliction can lead to other afflictions that the buyer may not have been thinking of in the first place. It's like how brainstorming works: one idea tends to lead to another.

If the buyer believes they don't have any afflictions, they aren't likely to do anything that rocks the boat, including buying your products or services. If this is the case, it's up to you to help the buyer understand that their situation may not be as good as they think and that they do have afflictions worth solving.

But uncovering afflictions is only half the story because afflictions only focus on half of the buyer's needs—the negative half. If you focus only on the negative, you're leaving opportunities on the table to generate new opportunities.

What do we mean by missing half the buyer's needs?

Here's an example:

Riley is meeting with Greta, the owner of a medium-sized business, who is dissatisfied with her firm's tax services provider. The conversation reveals the issues: missed deadlines, lack of personal touch, and outdated tax knowledge. Riley's firm, known for its industry expertise and stellar customer service, clearly outshines Greta's current provider. Through his questioning, Riley identifies how their firm can assist, laying out the next steps and feeling positive about acquiring a new client.

As the meeting concludes, Greta invites Riley to join her for lunch with her company's lawyer. At lunch, the lawyer's forward-looking questions reveal the business owner's ambitious plans and unlaunched initiatives.

These forward-looking questions—focused on future aspirations, not problem-solving—include questions like:

- "So, what's going on at your company lately?"
- "What do you want to get done in the next year or so?"
- "What are your stretch goals for the business?"
- "What do you think you need to do to get these things done?"
- "What don't you know yet that you need to find out?"



## 11 Steps for Leading a Thorough Needs Discovery Call

Listening, Riley discovers several strategic areas where his firm's expertise aligns perfectly, including a niche company valuation, an area where Riley excels, and which promises significant fees. This encounter opens new avenues for collaboration, leveraging Riley's expertise in ways that weren't anticipated during the initial sales conversation.

So, what happened here? How did Riley not uncover these opportunities earlier?

During the initial sales meeting, Riley focused on uncovering and soothing the buyer's afflictions. He did a good job of learning about the buyer's problems and found out how he could help.

During the lunch meeting, however, the lawyer focused on the buyer's aspirations. And by doing so, the lawyer uncovered a whole other set of needs that Riley neglected to bring to the surface. The lawyer focused on the second half of business needs—the positive, the future, and the possibilities—the aspirations.

For your next needs discovery call, find the areas of your buyer's pain and problems that you can fix, but also focus on their aspirations and how you can help achieve those. You'll find the conversations to be richer, the relationships deeper—and your sales success greater.



## 5. Ask “Why?” to Get to the Root Cause

An especially valuable approach to needs discovery is called the [Five Whys](#). This is an essential component of a world-class needs discovery as knowing the root causes of problems will define your solution and the success it will have.

The Five Whys is a design-thinking technique where you ask “Why?” five times. It goes beyond putting bandages on the symptoms of a problem and instead helps business leaders address the underlying causes, thus permanently solving the problem and creating a lasting new reality.

This method helps you collaborate with buyers to uncover the root cause of what is driving their needs and craft the most compelling, powerful, and lasting solutions.

The Five Whys is to problem-solving and critical thinking what removing weeds by the root is to gardening. Fix a symptom in business but not the underlying cause—and much like a pulled weed with the root left in the ground—the symptom is bound to sprout up again. Fix the underlying cause of a problem at the root and you’ll see lasting improvement.

## 6. Seek to Uncover Both Rational and Emotional Needs

Selling is about change. It’s about persuasion. It’s about helping buyers move from their current state to a better future, their New Reality.

If you don’t understand your buyer’s needs, you won’t know how to inspire and persuade. You won’t be able to accurately juxtapose the buyer’s current reality with their possible New Reality.

There are two categories of buyer needs:

- **Rational Needs:** These are explicit rational needs stated by the buyer, usually financial, technical, or strategic. Rational needs may also be hidden, yet to be disclosed by the buyer.
- **Emotional Needs:** These can also be explicitly stated needs, or just suspected. Common themes of emotional needs are professional, social, or psychological, and they can be just as powerful as rational ones.

Emotion is a powerful driver of sales. It’s often said that people buy with their hearts and justify with their heads. Buyers may not even be aware of the emotional needs underlying what they think are rational decisions.

For your solution to truly resonate with buyers, you must be aware of the emotional needs underlying rational needs. Emotional needs often drive the final buying decision. If you can appeal to the right emotions, you can inspire your buyer to make a change that will impact their business for the better.

## 7. Transcribe Needs in Real Time

As you facilitate the discussion on a discovery call, write down the needs for the buyer to see. If the call is virtual, you can do this by sharing your screen, and if in person, use a whiteboard or flip chart. Let the buyer see how you're interpreting their words. Let them see how you're thinking and processing what they're telling you in real-time.

This allows you and the buyer to ensure you're on the same page. Literally. Even better, they can help you refine or clarify anything they said that you didn't transcribe properly, saving you time later.

It's simple, but the effect of seeing thoughts and ideas written down can be powerful. When you write what the buyer is saying and they see it, they know they're being heard. They know you have it covered—and that you're on this journey together. You've created a shared understanding of needs.

## 8. Keep the 30+3 Rule in Mind

[According to the 30+3 rule](#), you have 30 seconds to grab people's attention, and if you don't re-acquire their attention every 3 minutes or so, you risk losing it. Within the first 30 seconds after the call kicks off, start with questions and immediately engage.

You might say, "Big picture: what are you hoping to accomplish?" It sounds basic, but it's an effective way to get your buyer talking.

Share your screen and begin screen journaling or take notes on a whiteboard if in person. This is an effective way to encourage attention.

If you're on a call with multiple people, as people start talking, make sure you facilitate by directing the question to anyone who hasn't chimed in. "Terry, you've been quiet thus far. I'm curious, what's on your mind?"

When facilitating, it's great if you show *pre-planned categories of common needs* and start immediately categorizing the buyer's responses in a variety of areas. Then you have people focusing on the responses and thinking of their own needs in the various categories.

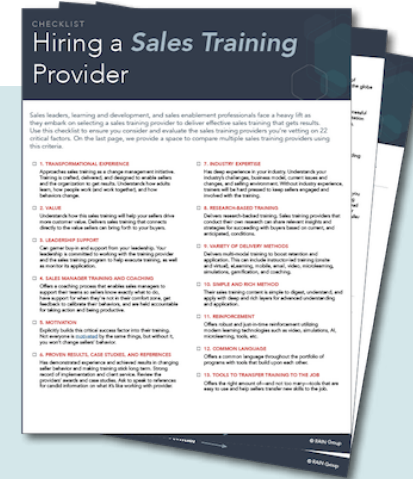
## 9. Use a Checklist

Display a visual that outlines the variety of needs that are common to buyers in your industry or of a certain type. An example of this is a checklist you've created based on your research that you review together with the buyer to ensure all relevant categories of needs are covered.

If the buyer doesn't comment on an area that you think is critical, you can ask about it and talk about why it's critical. Then, you can follow up with something like, "It seems to me that if we tackled these three areas, we'd end up with huge gains in performance and ROI. Do you agree? Where else should we focus?"

This is a way to gain immediate engagement and set up a rich discussion to help you drive needs discovery.

➔ **Download the Hiring a Sales Training Provider Checklist** to get an example of a checklist you can use in discovery calls. It will also help you select a provider to train your sellers on the skills in this ebook.





## After the Discovery Call

### 10. Establish Clear Next Steps

After spending valuable time with your prospect—be it 30, 45 minutes, or longer, what next?

Jumping straight to a proposal might seem like the next logical step, but it's often too soon for such a commitment. A more strategic approach involves sending a summary email or discussion document that confirms the shared understanding of needs from the discovery call.

In your follow-up email:

- Outline your understanding of their current situation.
- Confirm the shared understanding of needs:
  - Summarize what you heard and list the core needs as you heard them.
  - Take the opportunity to highlight any gaps and offer insights. For example, maybe you discussed needs A, B, and C, and from your experience you know there are two common pitfalls when addressing these issues. Ask to open a discussion to probe further.
  - Ask that the buyer respond confirming the needs and if there's anything you missed. This will help solidify the shared understanding of needs between you and the buyer, demonstrating your listening and effective needs discovery skills.
- Share your evaluation of how your solutions align with their challenges.
- Propose next steps. Communicate clearly and concisely what you consider to be the most beneficial next step. This involves seeking the buyer's agreement on this proposed step, scheduling a specific time for it to occur, and fulfilling any promises made during the discussion. This proactive approach not only demonstrates your commitment but also keeps the momentum of the sales process moving forward.

## 11. Embrace Ongoing Needs Discovery

Needs discovery doesn't conclude with the discovery call; it's an ongoing journey throughout the sales process and into account management.

After a sale closes, effective account management hinges on continuously adapting to your client's changing needs and maintaining an open line of communication. By regularly revisiting and updating your understanding of their needs, you become more than a vendor—you evolve into a trusted advisor committed to your client's long-term success.

This ongoing discovery process not only cements client loyalty but also ensures your solutions remain aligned with their changing goals.



# Master the Needs Discovery Process

If you want to be successful in sales, it's important to know what your buyer needs. There's no use wasting your time if you're trying to sell a company on a solution they don't need or that won't be good for their business.

That's why discovery is such an important part of the sales process. It allows you to uncover opportunities and craft a solution that will be more relevant and effective.

Use these steps to help you prepare for your next needs discovery call:

1. **Prepare questions in advance of your meetings.** Do your research and know what information you need to gather so you can fill in all the blanks.
2. **Ask questions ahead of meetings via email.** Prepare buyers by asking questions in email or survey. This will get them thinking about their needs and equip you with information to dig deeper into your meetings.
3. **Use a mix of broad open-ended, specific open-ended, and specific closed-end questions.** You may know what you need to know, but sometimes, asking open-ended questions will reveal opportunities you and the buyer didn't know existed. Plus, the questions you ask can help you demonstrate your knowledge of the buyer's industry, company, or issue.
4. **Ask both afflictions-based questions (pain) and future-seeking, aspirational questions about hopes, goals, and objectives.** This will allow you to uncover the broadest set of buyer needs.
5. **Ask why more than once to get to the root cause of issues.** The 5 Whys will allow you to get beyond the symptoms of a problem and instead address the underlying causes, creating a lasting new reality.
6. **Seek to uncover both rational, the financial, technical, and strategic needs, and emotional needs, the professional, social, or psychological needs of the buyer.** Desire and fear are powerful emotional drivers for decisions to act.



7. **Summarize what you hear by writing on screen, or on the wall, during your meetings.** Real-time screen journaling will ensure you and your buyer are on the same page. Literally.
8. **Keep the 30+3 rule in mind.** Hook buyers within the first 30 seconds of your meetings and keep them engaged with additional needs discovery questions every 3 minutes.
9. **Use a checklist** and share it with the buyers to ensure all needs are thoroughly explored and uncovered.
10. **Summarize the discussion, needs uncovered, and any additional areas of inquiry in an email after the meeting.** This creates a shared understanding of needs and allows you to stay top of mind with your buyer.
11. **Embrace Ongoing Needs Discovery.** Regularly revisit and update your understanding of your client's needs to become a trusted advisor committed to your client's long-term success.

With your buyer's needs discovered collaboratively and effectively, you'll be one step closer to suggesting solutions and closing another sale.

➔ **Download the 10 Powerful Questions for Needs Discovery Checklist** included in this toolkit to get questions that will help you get to the root of your buyer's needs.

#### CHECKLIST 10 Powerful Questions for Needs Discovery

If you want to be successful in sales, it's important to know what your buyer needs. There's no one waiting your time if you're trying to sell a company on a solution they don't need or that won't be good for their business. Asking powerful questions is a key part of the discovery process. The right questions allow you to uncover opportunities and craft a solution that's relevant and effective. Use the three types of questions for powerful needs discovery.

1. **Broad open-ended questions:** These get people to open up and start talking.
2. **Specific open-ended questions:** These uncover latent needs that buyers may not be aware of.
3. **Closed-ended questions:** These are great for diagnosis and uncovering needs that buyers may not get past as a problem.

Here are 10 specific questions you can ask to uncover explorations and efficiencies:

1. If, at the end of this meeting, you looked back and thought, "That was time well spent," what would we have covered?  
What better way to run a meeting than to make sure you cover exactly what matters to the buyer? Plus, this question gives you explorations and efficiency for the meeting, which ensures you're not only focusing on the priority.
2. Why isn't this particular technology/service/product/strategy or issue working for you right now?  
Many buyers are willing to talk to others because something they're doing is using right now isn't working for them. It's important to know what you're up against.
3. Many of our customers report problems with A, B, and C. How are these areas affecting you?  
What do you think about them?  
This is a great way to establish expertise and industry credibility. It also sends the message that about their challenges in a different way or consider challenges they haven't identified previously. The idea is to ask specific, open-ended questions that show you know the area well.
4. What's holding you back from reaching your revenue-or-profit, or other-goals?  
Learning about obstacles early in the conversation is important. If the buyer believes an obstacle is insurmountable, it's up to you to show them why it's not and how to get past it.

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# Foundations of Consultative Selling

## Lead Masterful Sales Conversations with Consultative Selling Skills

Sales are won and lost based on the conversations your sellers have with buyers. Too often, sellers make mistakes—common mistakes that end up losing them the sale.

Our RAIN Selling: Foundations of Consultative Selling training program teaches your team a proven process for leading masterful sales conversations from “hello” to “let’s go.”

This program introduces the strategies and tactics that are the foundation of successful selling, and the key selling skills your team needs to become top performers.

With a training library composed of over 85 learning modules, we work with you to quickly design custom curricula with the content your team needs to lead masterful sales conversations.

Foundations of Consultative Selling modules include:

- Introduction to Consultative Selling
- Leading a Thorough Needs Discovery
- Building Rapport
- Making the Impact and ROI Case Powerfully
- Crafting a Value Proposition Positioning Statement
- Overcoming Objections
- Mini-Stories That Sell
- New Reality and The Buyer Change Blueprint
- Communicating with Different Personalities
- Keys to Qualifying the Sale
- 11 Keys to Influence and Persuasion in Sales
- Strategies to Build Trust in Selling
- Mastering the Art of Sales Collaboration
- Delivering Compelling Sales Presentations
- Value Through the Eyes of the Buyer

[Click here to request a complimentary consultation](#) →



## RAIN Group Delivers World-Class Sales Training

- Modular, multi-modal, and purpose-built for the **modern learner**.
- Unique approach to driving **behavior change** through a process we call Execution Assurance.
- Focused on driving the **business results** important to you.
- A **transformational experience** that ensures the development, adoption, and implementation of new skills.
- Action-oriented **coaching** prepares sellers for real situations and provides direct feedback.

# About RAIN Group

## Drive Transformational Change through Award-Winning Sales Training

We help organizations:

- Enhance sales capability with award-winning sales training
- Design and execute strategic account management initiatives
- Increase effectiveness of sales management and coaching

**Best IP:** We study buying and selling relentlessly through the RAIN Group Center for Sales Research. Our research and field work allows us to create industry-leading intellectual property to help our clients achieve the greatest success.

**Best Education System:** We use the best education approaches, methods, and technologies to make training work, stick, and transfer to the job.

**Best Results:** We make it our mission to drive value and achieve the highest client satisfaction through excellence in quality and producing transformational results for our clients.



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