Discovery Using The Perfect Meeting Framework

LENGTH: 30 MINUTES

Discovery is the most important component of a sales process. Even though we often call the first meeting a "discovery meeting," it is important to always be in discovery mode. Each meeting should unearth new and important reasons a prospect may or may not buy from you.

Our discovery meeting format has been tried and proven across almost any industry you can name. While the words and desired outcomes may be different in each meeting throughout the sales process, this framework will provide you a powerful way to improve your sales teams' performance and improve the call coaching for the team.

In The Perfect Meeting™ framework below observe how you can intentionally control the flow of the meeting while building an emotional bond with the prospect by evoking specific emotions as you move through the process.

The Perfect Meeting

Rapport
Emotion: Familiarity

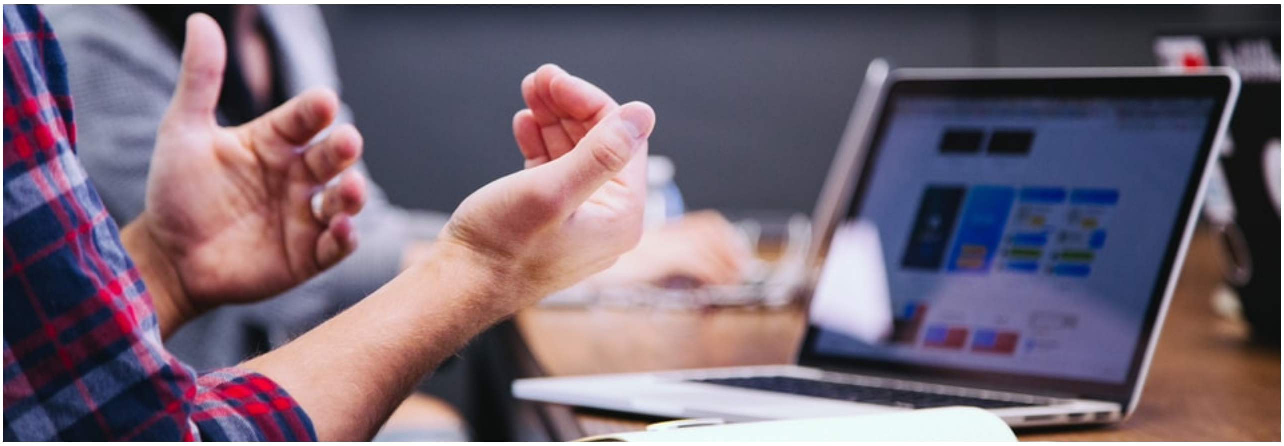
Today's Value
Emotion: Certainty

Agenda
Emotion: Confidence

The Middle
Emotion: Desire

Return To Value
Emotion: Clarity

Prescription
Emotion: Urgency



1. RAPPORT

While personal rapport over the entire sales process matters, in this moment you only want to illustrate you are personable and understand the value of time. You will continue to develop rapport with your expertise and questions over the next 30 minutes. This section should normally last 2-3 minutes and no more than 5 minutes maximum. Ideas to include:

1. Friendly observation about something you noticed about them while doing research.
2. A question about their previous work experience.
3. A question about their location and surrounding area.
4. Introductions from their team. Ask them to go first.
5. Your introduction. This is your first opportunity to differentiate yourself from other salespeople. The introduction should be strategic and almost never include your title.

Sample Introduction

My name is Jane Smith and I help software engineering teams keep up with the increasing demands of the business for faster turnaround and more complex requirements in a incredibly tight labor market.

2. TODAY'S VALUE

It is important to align on Today's Value for you and the prospect. Why did they agree to meet with us? Make no assumptions you must hear it directly from the prospect. Do not let this part of the meeting take on a life of its own by asking too many tactical questions.

We will also address any potential roadblocks here to determine their real significance. If they are deal breakers we can terminate the conversation after you and the prospect agree on this fact. Today's Value may start like the samples below:

> For Inbound Leads- "I spoke with CO-WORKER and she started to fill me in on the project/challenge you are trying to tackle. She said......... But often it's helpful to hear these things in your words, can you fill in gaps we may not have covered?"
>
> For Outbound Sourced Leads - "I'm curious what piqued your interest in talking today?" or, "I am glad we could find time to talk today and I know time is valuable. So, I'm curious what in the email I sent piqued your interest in scheduling time to talk?"

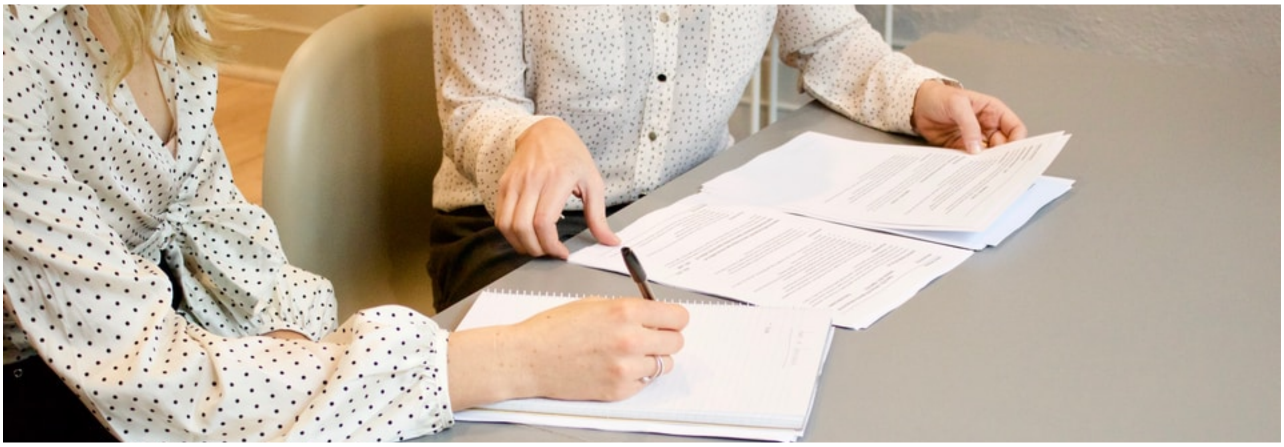
"The salespersons goal is to get to yes OR no as quickly as possible, but no sooner than necessary."

3. AGENDA

The agenda or lack of agenda used by sales teams throughout the world may be the #1 mistake made in discovery calls. Rather than set an agenda which is intent on "qualifying" prospects for the next step, we must set an agenda that helps discover "why they will buy." The goal is to move their eyes up off their desk, the fires they are working on today, and to help them align the current challenges to a larger 12-month goal.

> "Do you mind if I propose an agenda to help keep the call on track today?"
>
> If you don't mind I'd like to pull out a little bit and understand how this fits into the larger plans over the next 12 to 18 months, then we will get into project specifics in a few.
>
> I'd love to understand what's important to you and what you are focused on over the next ---------- months,
>
> I'll sprinkle in some information about our company as appropriate.
>
> And at the end of the call we can decide together whether or not there is a reason to get back together again.
>
> Sound reasonable?"
>
> "Great, so to start, can you tell me what you are focused on over the next 12-18 months?"

"Solving tactical problems leads to small deals. Helping the prospect discover strategic problems is where the big deals come from."



4.THE MIDDLE

This is where the first 3 steps of The Perfect Meeting™ payoff. You've aligned on why this meeting is important, you've set the expectation for them to share their priorities before you talk about your company, and you've asked a great opening question.

You must start curious and stay curious. The key is to avoid selling and seek to understand the answers to the following questions:

Have the customers elaborate on priorities. These should not be tactical items but longer term plans over the coming quarters.

Where they are today?

Where they would like to be 12-18 months from now?

What happens if they don't achieve the goal?

What is standing in their way?

Your job is to help them realize the bigger problems they are not considering.

After 20 minutes, you've had a powerful meeting, provided significant value to your prospect and you have a high-level view of why they might buy. Now you conduct The Pivot to move from The Middle to the Return to Value.

THE PIVOT

"John, I appreciate you sharing so much with me today about your goals and challenges. Would it be helpful if we pivoted, and I shared a little about our company?"

When the prospect agrees, your goal is to spend only 2-3 minutes sharing the types of solutions you provide that may help them reach the strategic priorities they shared with you.

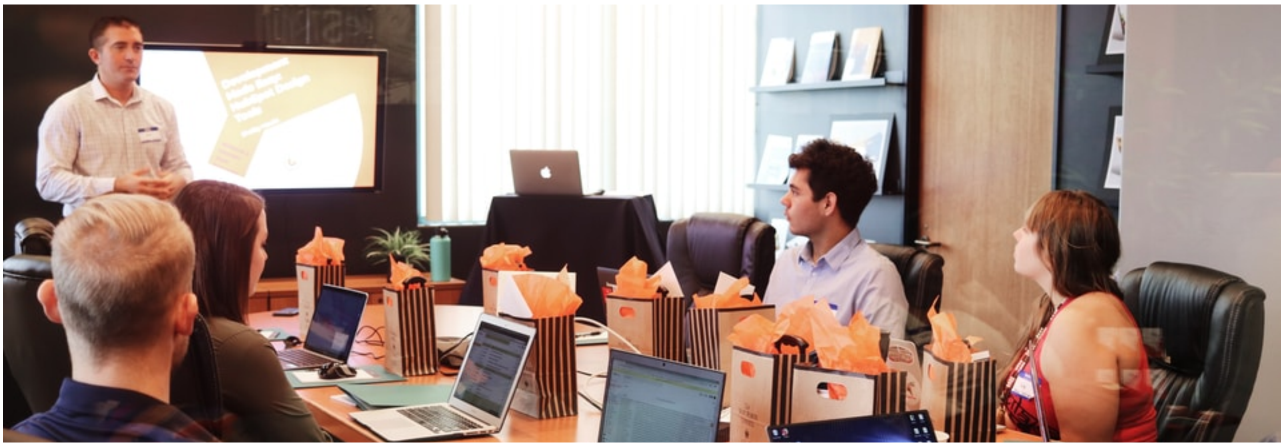
"The primary goal of the Discovery Meeting is to give the prospect hope you can help, not to solve their problems."

5. RETURN TO VALUE

"Do you mind if I play back what I heard you are trying to do, so I can make sure it's organized in my head?"

The Return to Value is critical to prove you heard their concerns, helped them tie the challenges to larger issues and exposed some ideas they may not have considered. It is a summation of the previous 20 minutes of the call and allows you to use it as a springboard to prescribe the next step.

Ideally you exposed 2-4 challenges they are trying to or need to overcome. In this part of the meeting our purpose is to gain agreement on the issues and priorities they are addressing.



6. PRESCRIPTION

The Prescription is the most effective way to keep control of the sales process and align with the prospect on next steps. In most meetings there are three potential outcomes: disqualified, add more people to the current conversation, or move to the next step in the sales process.

In the Prescription you are to recommend the next step and tie it back to how it will move them closer to the goals you agreed on in the Return to Value.

As an example:

"If you don't mind, I'd like to make a recommendation, is that ok? Based on your goals and what's going on, there may be a way we can help. I think the most valuable next step for you would be: ______________, so that (value prospect will receive from participating in next step).

"My CEO said that was the best sales call he has ever attended"

Erin H.

"You are the sales ninja. This discovery call format changed everything for me."

CJ

"I feel more confident than I ever have walking into a discovery call."

Randy S.