

Discovery Call

Name: _____

Date: _____

Before the call



Research

01



Research potential client (website, social and LinkedIn)

Notes



Research

02



Prepare tailored questions based on prospect's business/life area

Notes

Discovery Call

Name: _____

Date: _____

Before the call



Research

03

- ☐ Have offer/pricing sheet ready

Notes



Research

04

- ☐ Set clear intention: (Qualify / Offer solution / Provide value)

Notes

Discovery Call

Name: _____

Date: _____

During the call



Discovery

05

- ☐ Start with rapport-building (1-2 mins personal getting to know you)

Notes



Discovery

06

- ☐ Ask about key struggles/goals (open-ended questions)

Notes

Discovery Call

Name: _____

Date: _____

During the call



Discovery

07

- ☐ Highlight relevant success stories/testimonials

Notes



Discovery

08

- ☐ Offer 1-2 quick actionable tips

Notes

Discovery Call

Name: _____

Date: _____

During the call



Discovery

09

- ☐ Explain your process/services

Notes



Discovery

10

- ☐ Confirm next steps (proposal, booking, follow-up email)

Notes

Discovery Call

Name: _____

Date: _____

After the call



Follow-up

11

- ☐ Send thank you email, plus any promised resources

Notes



Follow-up

12

- ☐ Attach proposal/offer PDF

Notes

Discovery Call

Name: _____

Date: _____

After the call



Follow-up

13

☐ Schedule follow-up (if needed) _____

Notes