

Discovery call script

Module 1: Clients

Not a script to read out. A rough shape for the call.

Open

Before I tell you anything about how we work, can you walk me through what's going on and what made you get in touch now?

Qualify

- What have you tried so far, and what happened?
- Who else is involved in deciding this?
- Is there a date this needs to be done by, and what's driving it?
- Have you set a budget, or would it help if I gave you a range?
- What would make this a success six months from now?

Close

Here's what I'd suggest as a next step. I'll send a short proposal by Friday. If it isn't the right fit, I'll say so and point you somewhere better.

Listen for

- Pushback on a deposit or on paying anything before work starts
- "The last person we worked with was useless" with no detail on why
- A deadline that only makes sense if you start tomorrow
- Nobody in the room can say yes