

# DISCOVERY MEETING QUESTIONS WORKSHEET

Could you share with me some of the initiatives/goals you have on deck for the coming months/year?

What are you hoping to achieve through those programs?

Do you anticipate any challenges achieving the goal(s)?

Do you have a timeline you are working with for these plans?

Have you ever worked with a company like yours before?

If yes – how did that go?

What did you enjoy about the process?

Was there anything you'd do differently in the future?

What do you look for in an external partner?

If no – have you ever considered it?

If yes – what were the factors that contributed to the decision not to move forward?

If no – continue with the regular list of questions

What is the decision-making process in your company? (this should include who, how, timeline). If they don't tell you who, ask – could you share with me who is involved in the decision making?

I wouldn't ask them what role they play in the process. The goal of asking questions this way is to keep them from going on defense. You just want to gather information.

What, if anything, has changed in your industry in the past 5 years?

Are there changes you are anticipating in the coming years?

Are there other areas of the company that could benefit from learning about your unique approach to (what you offer)?

Would you be open to introducing me to someone in those areas?

Have you considered a budget for this? If they've used a product or service like yours in the past they have an idea of what the investment could be. So, frame the budget question based on whether they've had experience before.

If you ask—what's your budget for this? You probably won't get an answer. It's a place where prospects feel vulnerable. Asking them if they've considered a budget is a softer, easier question. A different way to ask the budget question is this—Would you be open to sharing with me what you are thinking in the way of a budget for this?