

10 Steps To A Successful Discovery Call

(save this to your google drive as a template so you can make a new copy whenever you have a discovery call)

Intake form

Either have the intake pulled up or put highlights here that are important

intro

Quick small chat, give a compliment of something you saw and impressed you about their business. Let them know you looked over their intake form

"tell me in your own words"

"this is what i hear you need and what I can do for you"

Present the package to them

this is what it looks like to work together

Tell them what happens after they agree to work together, contract sent over, strategy call, next 24hours, etc...

any questions?

"NOW THAT I HAVE TOLD YOU ABOUT MY PACKAGES AND WHAT IT LOOKS LIKE TO WORK WITH ME, WHAT QUESTIONS DO YOU HAVE?"

are you ready to get started?

15 minutes

Do not give away strategy keep it short. Use this area to put some bullet points of what questions you may have for them

post-call proposal or contract

if they say yes then send contract and invoice within the next 30 minutes. If they say they need to think about it make sure to get a case study or proposal over to them in the first 24hours and have a follow up plan in place.

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<https://brandimowles.com/2022/07/05/15-minute-discovery-call/>