



DISCOVERY CALL

TEMPLATE



HOW TO PROPERLY CONDUCT THE DISCOVERY CALL TO YOUR POTENTIAL CLIENT?

Purpose:

We conduct discovery calls to potential clients to learn everything about the business. We ask questions to know the business goals, target market, old and possible new strategies, strengths, weaknesses, opportunities, threats, struggles their business faces, and more.

- During the interview, prepare your client by asking
- questions about the role you are applying for.
- Slowly build rapport.
- Learn your client's business.
- Listen carefully before speaking.
- Make sure you are confident enough to conduct the discovery call.

QUESTIONNAIRE:

01 What are your current business goals?

- Ask your potential clients about their business goals, and make sure every goal is specific.
- Ask them why they want to market on different social media platforms.
- GOAL must be Specific, Measurable, Achievable, Relevant and Time-Framed
- Ex. Do you want to market on social media because for brand awareness? To generate sales?

02 Who is your ideal customer?

- Ask about the demographic and psychographic factors of their ideal customer.
- Ask who were their past customers.
- Ask where did they find their past customers.

03 How do you market your business before?

- Ask about their marketing strategies before, because you can get an idea of how you will market it today.
- Ask how they generate sales before and up to this day.

04 What are the current struggles of the business as of now?

- Ask about the problems they are facing right now. Ask
- about their struggles.
- You can give some solutions to their problem, just a sneak peek, so they will be comfortable with you.
- Knowing their struggles will be the based of your marketing strategies.

05 What do you think are the strengths of your business?

- Ask this so you will have an idea of what you can highlight and market to their target market.

06 What do you think are the weaknesses of your business?

- Know their weaknesses so you can strategize on how you will address those factors.
- Assess their weaknesses and provide solution on how you will make it as positive

07 Who are your Top 3 competitors?

- It is important to know their competitors because you can create solid marketing strategies by knowing the strategies of their competitors.
- Ask your potential client what are their edges to their competitors.
- Make sure to list them.
- Ask them if they can provide their competitors' websites and social media links.

08 Why do you think your target market needs your business/services/products?

- Ask this to know their unique selling points.

09 Do you have any social media pages and websites that I can check?

- Ask this question so you can audit their social media pages, and see the current situation of their business on social media.
- Check also the website, so you can check the full information about their business.

10 What are your expectations if you will hire me?

- Asking this question will give you an idea of what your potential clients want to happen to their businesses.
- You will also have an idea if you can do the job or not.

How to properly end the discovery call?

Spiel:

Thank you for answering all the questions (Client's Name!) It will help me a lot to fully understand your business.

I have an offer for you, (Client's Name). After this call, I'll be sending or presenting a Social Media Marketing Proposal that will cater to your social media needs. After that, you can decide if you will hire me or not. Is this sound pretty good to you? Let me know what you think about my offer.

**OFFER YOUR SOCIAL MEDIA MARKETING PROPOSAL 24-48 HRS
AFTER DISCOVERY CALL**