



Avalocx Academy

University of Social Media™

Discovery Call Template

INTRO CALL LAYOUT

- Length: ~ 30 Minutes
- First 5: Ask them how their day is going, where they're based, etc.
- Next 20: Learn about their business + tell them how you can help them.
- Last 5: Ask if there's any number they'd like to stay under + let them know when you'll send your proposal.

KEY Q'S TO ASK ABOUT THEIR BUSINESS:

- What do they do? What streams of income do they have in their business, what are they most focused on/interested in for social?
- What are they looking for? (Full management, accountability/strategy calls, content creation, etc.)
- What are they struggling with/biggest social media challenges?
- What are their goals for social media in the next 3-6 months? (Follower growth/brand awareness, making sales, etc.)
- What does their budget look like?

WHAT TO TELL THEM ABOUT YOU:

- What do you do/how and why did you start? (But keep it brief - not a life story, just some background to help them connect with you.)
- How can you help them? (Tell them about your services.)

- Approx. how much money should they expect to put towards your services? (I like to give a range here)
- Optional but VERY helpful: Show examples of similar clients you've worked with + how you've helped them. THIS HAS HELPED ME SIGN CLIENTS LITERALLY WHILE ON THIS CALL!!

CONCLUSION/NEXT STEPS:

- IF THEY DECIDE TO WORK TOGETHER ON THE CALL:**
 - Send over a contract + pick a start date immediately.
- IF THEY WANT TO SEE MORE DETAIL/NEED TIME TO DECIDE:**
 - Ask them if there's a specific number they'd like to stay under in terms of budget.
 - Email a proposal with 3 package options based on the discussion + their needs.
 - Link your portfolio in the email for them to look at.
 - Let them know they should feel free to reach out with any questions.