



Discovery Call

Prep Doc

Company Name: _____

1. Understand the Company

- What does the company do? How do they make money, what do they sell?
- How complex is their business?
- How do they position themselves? Who are their competitors?
- Industry or company tailwinds (advantages working in their favor)
- Industry or company headwinds (challenges they're facing)

Account hypothesis:

- What are their business priorities right now?
- What are the key challenges facing their business: revenue, cost, risk?
- Where could your product or service realistically support them?

2. Understand the Meeting

- Who are you meeting today, and who else would you ideally meet after this call?
- What have you learned so far from your own research, or from whoever booked the call?
- Are they currently using a product or service like yours?
- What are they expecting to get out of this conversation?

Before you go in, name three things you couldn't find out from a Google search or their website. If you can't name three, you're not ready for discovery yet, you're ready for more research.

3. Bring Proof

- Where have you done this before? What are the most relevant examples from their industry?
- Which companies have achieved something close to what this prospect is trying to achieve?
- If you don't have a strong story yet for their exact industry or use case, look for the closest adjacent one, and be upfront that it's an adjacent example rather than a direct match.

Tip: wherever possible, name a customer with a similar job title to the person you're meeting. "I work with [name], [title] at [company]..." lands harder than a generic logo.