

DISCOVERY CALLS

convergo

DISCOVERY CALL TIPS

WHAT DO YOU DO TO PREPARE? (To "tee up" your client for this phase)

- Ensure key contacts on the client side are scheduled to attend
- Fill your your call planner
- Send the agenda the client
- Tee the client up

Set the Agenda

- Purpose
- Payoff
- Process
- Time Check

Example

- Purpose

The purpose of this meeting is to explore your business needs.

- Process

To do this, we will look at your specific needs for:

- Security
- Productivity
- and your Financial needs

- Payoff

By the end of the meeting, we will have a sense as to the extent that we can help you in these areas so that I can craft a solution to address them.

- Time Check

Do we still have 60 minutes for this meeting?

Discovery Call Objectives

- Position yourself to win by uncovering challenges with the current environment that are affecting the business that will leverage your strengths
- Close for Proposal

DISCOVERY CALL AGENDA - PROCESS

- Introductions, agenda, and positioning
- Explore Current Situation
  - **Soft Costs**
  - **Hard Costs** - may be a separate meeting
- Summarize key challenges uncovered and determine next steps

Hard Costs

Direct costs that you can document with a high level of certainty

Soft Costs

Indirect costs that may be challenging or impossible to measure

SOFT COST FRAMEWORK: WHAT AREAS TO EXPLORE?

Start with the "SPF" of Soft Costs...

- **S**ecurity
- **P**roductivity
- **F**inancial

HARD COSTS

- Current equipment cost
- Cost of printers/A4
- Outsourcing costs
- Leases
- Cost of service and supplies
- Other factors?

SOFT COST FRAMEWORK - SPF

	What do we have to help?	*Questions to Ask*
Security		
Productivity		
Financial		

BIGGEST CHALLENGES WITH CONDUCTING THIS MEETING VIRTUALLY

Challenge	*How can this be overcome?*