

INTERNAL REFERENCE

One-page live reference. Keep open on the second screen during every discovery call. AIDA is the arc. SPIN drives the questions. BANTA scores the qualification. Gold question pivots the close. Detective chain drills the truth out.

THE ARC

A

Phase 1, Opening

5 min

I

Phase 2, S+P

15 min

D

Phase 3, I+N

10 min

D

Phase 4, Solution

10 min

A

Phase 5, Close

5 min

HARD RULES

- ✓ Talk 30 to 43% of the call. Anything more is a pitch, not a discovery.
- ✓ Longest monologue under 90 seconds. After that, ask a question or shut up.
- ✓ 11 to 14 questions total. Fewer feels like a sales pitch. More feels like an interrogation.
- ✓ Open questions establish need. Closed questions confirm and commit.
- ✓ Ask the answer, not the next question. Drill before moving on.
- ✓ Implication questions ("what does that cost you?") convert harder than any other type.
- ✓ Close on the call. If they leave with "I'll think about it," surface the real objection first.

THE PHASES

Make them comfortable. Set the agenda. Get permission to ask hard questions. Surface why now.

SAY

Thanks for making the time. Before we get into things, let me quickly set out how this works. This is 45 minutes. I'm going to ask you some questions about your business, where you are now, and where you're trying to get to. If it sounds like we can help, I'll tell you exactly how. If not, I'll tell you that too. Either way you'll walk away with some clarity. Sound fair?

RAPPORT OPENER (PICK ONE)

- "I had a look at your website before the call. I noticed [specific thing]. Tell me about that."
- "[Referrer] mentioned you. They said [specific thing]. Tell me more about that."
- "We spoke at [event] and you mentioned [thing]. I wanted to pick that up."

THE SINGLE MOST VALUABLE QUESTION OF THE WHOLE CALL

- "What's prompting this conversation now?"
Ask this in the first 5 minutes. It surfaces urgency before you've asked anything else.

All open questions. Situation establishes context. Problem surfaces pain. By the end of this phase you should have 3 to 5 named problems written down in their words.

SITUATION (WHERE ARE THEY NOW?)

- "Tell me about your business. What do you do, and how long have you been doing it?"
- "How many people are on the team, and what does the structure look like?"
- "Walk me through what happens when a new client comes in. From first enquiry to getting the work done."
- "What tools are you using to run things? CRM, project management, accounting?"
- "Who does what in the business? Where does most of your time go on a typical day?"

PROBLEM (WHAT'S BROKEN?)

- "What's the thing that frustrates you most about how the business runs day to day?"
- "Where do things fall through the cracks?"
- "If I asked your team what the biggest operational headache is, what would they say?"
- "Have you tried to fix this before? What happened?"
- "What's stopping you from growing the way you want to right now?"

Turn the problems they named in phase 2 into real cost. Take them from "it's annoying" to "I have to fix this." End with the gold question. This is the highest-converting phase of the call.

IMPLICATION (WHAT DOES THE PROBLEM COST?)

- "When [their problem] happens, what does that actually cost you? In time, money, stress?"
- "How much of your week do you spend on things that somebody or something else should be handling?"
- "If nothing changes in the next 12 months, what does the business look like?"
- "What opportunities have you had to turn down because the business couldn't handle them operationally?"
- "What does this do to you personally? The hours, the stress, the feeling it all depends on you?"

NEED-PAYOFF (WHAT WOULD THE SOLUTION LOOK LIKE?)

- "If we could fix that, what would your week look like instead?"
- "What would it mean for the business if your team could handle things without you in the middle?"
- "If the system handled all of that, what would you do with the time you got back?"
- "What would need to be true for you to feel confident this was properly sorted?"

Only phase where you talk near 50%. Mirror their pain back in their words. Present the matched offer. Use the Hormozi value frame. Cap any monologue at 90 seconds, then check in.

STRUCTURE

- **Recap their pain in their words.** "So what I'm hearing is..." (top 2 to 3 pain points, verbatim).
- **Dream outcome.** "What we do is..." (describe what their business looks like after, not the technical process).
- **Proof.** "We did exactly this for a [similar business]. In one month, we replaced a full team member's workload."
- **Time delay.** "The review takes 2 to 3 weeks. A working system in 4 to 6."
- **Effort.** "Your involvement is the kick-off and the sign-off. Everything in between is handled by our team."

CHECK-INS (USE AFTER EACH CHUNK, NOT AFTER THE WHOLE THING)

- "Does that resonate with what you described?"
- "Is that the kind of thing you had in mind?"
- "Am I reading that right?"

Closed questions now. Get a yes or a specific next step. Never let them leave with "I'll think about it" unexamined.

SAY

Based on everything you've told me, here's what I'd recommend. Start with [matched offer]. In [timeframe], you'll have [specific outcome]. If you decide to move forward with the build, that fee is credited in full. Does that make sense as a starting point?

SOFT CLOSES (USE WHICHEVER FITS)

- **Assumptive.** "I'll get the proposal over this afternoon. What email should I send it to?"
- **Timeline.** "You mentioned wanting this sorted before [their event]. If we start next week, we'd have the roadmap back by [date]. Does that timeline work?"
- **Sharp angle.** If they ask "can you do X?" reply with "If we included that, would you be ready to get started?"
- **Risk reversal.** "The review is standalone. No commitment beyond it. Worst case, you walk away with complete clarity on what's holding you back."

IF THEY SAY "I NEED TO THINK ABOUT IT"

- "Completely understand. Can I ask what specifically you'd like to think through? Is it the timing, the investment, or whether this is the right approach?"
This isolates the real objection so you can handle it directly.
- "When would be a good time for me to follow up? Tuesday or Thursday?"
A choice, not an escape.

QUALIFICATION

Tick each box as it gets confirmed during the call. If any are still empty at the close, ask before you hang up. Leaving a discovery call with an unconfirmed BANTA is a wasted call.

B

CONFIRM BY PHASE 3 OR 4

- "Have you set aside a budget for solving this, or are we shaping that together?"
- "What have you spent on this kind of thing before?"
- "If we found the right fix, what range were you thinking?"

T

CONFIRM IN PHASE 1 (WHY NOW?) AND PHASE 3

- "When does this have to be sorted by?"
- "What's prompting this conversation now and not 6 months ago?"
- "Is there a date or event driving this?"

A

CONFIRM BY PHASE 1 OR 2

- "Who else needs to be involved in a decision like this?"
- "Is it just you signing this off or is there a partner / board / spouse?"
- "Walk me through how a decision like this normally gets made."

A

CONFIRM IN PHASE 5

- "Are you ready to take a next step on this today?"
- "Shall I get the proposal over this afternoon?"
- "What would need to be true to start next week?"

N

STRONG VS WEAK BY END OF PHASE 3

- "On a scale of 1 to 10, how urgent is fixing this?"
- "What happens if you don't sort this in the next 6 months?"
- "Is this a 'need to have' or a 'nice to have' right now?"

DEPTH TOOL

When they give you an answer, don't move to the next question on your list. Drill the answer first. Five follow-ups per answer is normal. The motive (the emotional cost, the embarrassment, the "I should have fixed this years ago") only surfaces after layer 3 or 4. That's where the buy moment lives.

WORKED EXAMPLE

Them: "We're spending too much time on admin."

- 1 Investigate.** "What admin specifically?"
Now you know what.
- 2 Find clues.** "How many hours a week is that?"
Now you have a number.
- 3 Motive.** "Who's doing it, you or the team?"
Now you know whose pain it is.
- 4 Cross-examine.** "How long has it been like that? What have you tried?"
Now you know history and failed attempts.
- 5 Confession.** "What stopped it working last time? What does that feel like?"
Now you have the emotion. This is the buy moment.

UNIVERSAL DRILL-DOWN QUESTIONS

- "Tell me more about that."
- "What does that look like day to day?"
- "When you say [their word], what do you mean exactly?"
- "Walk me through that."
- "And then what?"
- "What happens after that?"
- "How does that feel?"

THE PIVOT

A gold question offers two answers, both of which highlight a need. Used once, at the end of phase 3, to crystallise the priority before you present. Whichever answer they give tells you how to frame the recommendation.

If "team" → lead with adoption and process. If "my time" → lead with automation and CEO freedom.

Both point to systems. Reveals whether they're driven by growth or by lifestyle.

Forces them to articulate the loss in the way they actually feel it.

Diagnoses where the systemic break is. Most owners think "customer journey" but the real fix is workflow.

Reveals trust level. "Visibility" means they don't trust the team yet. "Without asking" means they want to step out.

IF YOU GET STUCK

THE "I'VE LOST THE THREAD" RESET

- "Can I ask you something about that?" (resets any conversation back to them)
- "Sorry, can I just go back a step. You mentioned [thing]. Tell me more about that."
- "That's really useful. Let me ask you this..."

THE "THEY'VE GONE QUIET" PROMPT

- "What's on your mind?"
- "What are you thinking?"
- "Is something not landing?"
- Silence. Five seconds. They will fill it.

THE "I DON'T KNOW WHAT TO ASK NEXT" FALLBACK

- "What haven't I asked you that I should have?"
- "If we were sitting here in 12 months and this had gone brilliantly, what would have happened?"
- "What would make this conversation worth your time?"

THE DATA

Top-performer benchmarks from Gong's analysis of B2B sales calls. Use these as the bar to hit.

43%

Talk time of top sellers. Lower is good, but under 30% looks like an interrogation.

11-14

Questions asked in the highest-converting discovery calls.

<90s

Longest monologue in a winning call. Past 90 seconds, close rate drops.

2x

Close rate uplift when "what's prompting this now?" is asked in the first 5 minutes.

3x

Close rate when the discovery call happens in the same week as the enquiry.

#1

Implication questions are the strongest single predictor of close.