RS-T03 / PLAYBOOK

Discovery Call Playbook

Run discovery that earns the next step.

BUILT FOR

Sellers, Sales Managers

STAGE

Improve

YOU LEAVE WITH

A call plan, a question bank, and a scorecard

INSIDE

01 Understand
02 Apply
03 Learn
04 Evaluate
05 Go further

01 UNDERSTAND

Discovery is where deals are won or quietly lost.

Most stalled deals trace back to a first call that gathered facts but never confirmed a problem worth solving. This playbook gives you a repeatable structure, from preparation to a next step the buyer actually commits to.

THE PROBLEM

Calls turn into demos too early, buyers say "send me something," and deals drift without a real next step.

WHO IT'S FOR

Sellers running first and second calls, and managers coaching them.

WHEN TO USE IT

Before any first meeting, when conversion from first call to next stage is low, or when coaching from call recordings.

What a good discovery call produces

OUTPUT	WHAT IT SOUNDS LIKE BY THE END OF THE CALL
A confirmed problem	The buyer has described the problem in their own words and agreed with your summary.
Impact	You know what the problem costs them, in time, money, risk, or missed goals, as they see it.
A reason to act now	There is an event, date, or goal that makes this matter this quarter.
The path to a decision	You know who else is involved and how they decide.
A committed next step	A dated meeting with named people and a clear purpose, in the calendar.

The five parts of the call

01
Before the call
Research, hypothesis, and a call plan.

02
Opening and agenda
Agree why you're both there.

03
Question paths
Situation to decision, in order.

04
Confirming the problem
Play it back; get agreement.

05
Agreeing the next step
Dated, specific, owned.

Before the call.

Fifteen minutes of preparation changes the whole call. Arrive with a hypothesis, not a script.

Prep checklist

- [ ] Read their website, recent news, and open roles.
- [ ] Check the person's role, time in seat, and background.
- [ ] Note any trigger: new leader, funding, launch, hiring.
- [ ] Review any past conversations or CRM notes.
- [ ] Write a one-line problem hypothesis.
- [ ] Decide the next step you will propose.

Call plan

	YOUR PLAN
Objective What must be true at the end of the call?	
Problem hypothesis What we think is going on, and why	
Three must-answer questions	1.
	2.
	3.
Next step we will propose Who, what, and by when	
Walk-away signals What would tell us this is not a fit	

> EXAMPLE
>
> A seller at a B2B SaaS company preparing for a call with a new VP of Operations. **Hypothesis:** "New leaders often inherit manual reporting. With a board meeting next quarter, they may need numbers they can trust quickly." **Proposed next step:** a 45-minute working session with the VP and their reporting lead, within two weeks.

Open well, then ask in order.

An agreed agenda gives you permission to ask harder questions later. The question paths keep you from pitching too early.

Opening and agenda

STEP	WHAT TO COVER	SOUNDS LIKE
1 Purpose	Why we're meeting.	"The goal today is to understand what's happening on your side and see if there's a fit worth exploring."
2 Time	Confirm the time you have.	"We have 30 minutes. Does that still work?"
3 Their goals	Invite their agenda.	"What would make this a good use of your time?"
4 Agenda	How the call will run.	"We'd like to ask about how things work today, share a little about us if useful, and agree whether a next step makes sense."
5 Outcome	Make it safe to say no.	"If it's not a fit, it's fine to say so. If it is, we'll agree what comes next."

Question paths

Move through the paths in order. Ask one question at a time, then go deeper on the answer before moving on.

PATH	QUESTIONS TO ASK	LISTEN FOR
Situation	How does this work today? Who's involved? What tools or steps does it take?	Current process, owners, workarounds.
Problem	What's not working as well as you'd like? Where does it break down? How often?	Specific, repeated pain in their words.
Impact	What does that cost you in time, money, or risk? Who else feels it? What have you tried?	Consequences they can describe or estimate.
Priority	Why look at this now? What happens if nothing changes this quarter? Where does it rank?	A date, event, or goal that creates urgency.
Decision	Who else would weigh in? How have you made decisions like this before? What would you need to see?	People, process, criteria, timing.

GO THREE LEVELS DEEP

The first answer is usually the polished one. Follow it: **"Tell us more about that."** Then **"What does that look like day to day?"** Then **"What happens if it stays that way?"**

Confirm the problem, then agree the next step.

Before talking about your product, check you understood. Before ending the call, put the next step in the calendar.

Confirming the problem

Play back what you heard in three parts, then ask for corrections.

PLAYBACK TEMPLATE

"Let us check we've got this right. Today, _situation_. That's causing _problem_, which means _impact_. And it matters now because _reason_. Did we get that right? What did we miss?"

If they correct you, good. Their correction is the most accurate version of the problem you will get.

Agreeing the next step

A real next step has a date, named people, a purpose, and something the buyer does.

WEAK NEXT STEP	STRONG NEXT STEP
"Send over some information and we'll take a look."	"Let's book 45 minutes next Tuesday with you and your finance lead to walk through the numbers together."
"Let's reconnect in a few weeks."	"You'll check with your team by Friday; we'll hold Monday at 10 to decide on a pilot."
"We'll schedule a demo."	"A demo on the 14th focused on the two reporting gaps you described, with your ops manager joining."

Next-step checklist

- [ ] It has a specific date and time.
- [ ] It is in the buyer's calendar, not only yours.
- [ ] The right people are named and invited.
- [ ] The purpose is stated in the invite.
- [ ] The buyer has something to do before it.
- [ ] You both know what happens after it.

A worked example, and what to avoid.

> **EXAMPLE**
>
> A seller at a B2B SaaS company, first call with an operations leader. The seller opened with purpose, time, and agenda. Situation questions showed reporting was built by hand each week. Going deeper revealed the real problem: numbers didn't match across teams, and a board meeting was six weeks away.
>
> **Playback:** "Reports take a day a week to build, they don't match across teams, and with the board meeting in six weeks you need one version of the truth." The buyer added that finance had flagged the same issue.
>
> **Next step:** a working session the following Thursday with the buyer and their finance lead, invite sent before the call ended.

Common mistakes

- **Pitching at the first mention of pain.** Keep asking; the first problem is rarely the biggest one.
- **Stacking questions.** Ask one, then stop talking.
- **Accepting "send me something"** as a next step. Offer a specific meeting instead.
- **Single-threading.** If only one person knows about the deal, it is fragile.

Using it by role

FOR SELLERS

Fill in the call plan before every first meeting for two weeks. Then score three of your own recordings and pick one item to improve.

FOR SALES MANAGERS

Use the scorecard in one-to-ones on a shared recording. Coach one item at a time, and look for it again on the next call.

04 EVALUATE

Score the call.

Use it after a call or on a recording. Score 0 (missed), 1 (partly), or 2 (done well).

#	CRITERION	SCORE	NOTE
1	Prepared a hypothesis and a proposed next step before the call.	0 1 2	
2	Opened with purpose, time check, their goals, and agenda.	0 1 2	
3	Asked open questions, one at a time.	0 1 2	
4	Went deeper on answers before moving on.	0 1 2	
5	Uncovered impact in the buyer's terms.	0 1 2	
6	Found a reason to act now.	0 1 2	
7	Learned who else is involved and how they decide.	0 1 2	
8	Played back the problem and got agreement.	0 1 2	
9	Listened more than talked.	0 1 2	
10	Booked a dated next step with named people.	0 1 2	
	Total (out of 20)		

16 to 20
Strong call. Note what worked and repeat it.

10 to 15
Solid base. Work on the lowest item next.

0 to 9
Rebuild the structure. Practice the opening and question paths.

05 GO FURTHER

COACHING & ADVISORY

Want to work through this on a live deal?

Through Coaching & Advisory we review real calls with you or your team, score them against this playbook, and work on the one skill that will move your next deals.

Book a strategy call: cal.com/revseries/strategy-call

Prefer email? advisor@revseriesadvisory.com