

# Discovery Calls That Convert — Workbook

This workbook turns the course into a discovery-call system you can run on your very next call. Work through one section per module: build your qualification and agenda, prepare your diagnostic questions, script the money and objection moments, then close and measure. Fill in every field and template, because a call you have not prepared for is a call you will improvise, and improvised calls do not convert.

## Set Up the Call Before It Happens

Build the qualification filter, intake form, and agenda so every call starts in your control.

### Worksheet: Your Five-Criteria Fit Scorecard

Define what a qualified prospect looks like for your service. Score each criterion's meaning at 0, 1, and 2 so you can rate any inbound lead consistently. Set your call threshold at the bottom.

Problem fit: what problem must they have for a score of 2?

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Authority: what signals that the contact can approve the spend?

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Budget plausibility: what business size or stage clears your minimum fee?

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Timeline: what counts as a real reason to act in 30 to 90 days?

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Working relationship: what early red and green flags will you watch for?

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My booking threshold (e.g. 7 or higher gets a call)

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### Worksheet: Pre-Call Intake Form Builder

Write the five or six questions you will attach to your booking link in Calendly, TidyCal, SavvyCal, or Cal.com. Keep it short; every extra field lowers completion.

Question 1: the single outcome they want from this work

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Question 2: what is currently getting in the way

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Question 3: rough timeline to solve it

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Question 4: budget range (list the ranges you will offer)

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Question 5: website or social link and their role

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Optional Question 6: anything else I should know before we talk

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### Exercise: Write Your Upfront Contract Script

Draft the 20 to 30 second opening you will say at the top of every call to set time, purpose, what you will cover, and that a no is acceptable. Then read it aloud three times until it sounds natural.

- What is your exact wording for the time, purpose, and agenda?

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- How will you explicitly make a no feel like an acceptable outcome?

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- What is your one-line transition from the contract into your first real question?

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### Checklist: Pre-Call Readiness Checklist

- I have written my five-criteria fit scorecard and set a booking threshold
- My booking link has an intake form with five or six questions attached
- I have read the prospect's intake answers and visited their site or profile
- I have one sharp, specific opening question ready based on their answers
- My AI notetaker (Fathom, tl;dv, Otter, or Fireflies) is set to join the call
- My calendar is open and ready so I can book the next step live

## Run the Diagnostic Conversation

Prepare and rehearse the SPIN and Gap Selling questions that uncover and quantify the real problem.

### Worksheet: Your SPIN Question Bank

Write two or three of each SPIN question type, tailored to your service. Pre-research your situation answers so you can spend live call time on implication.

Situation questions (facts I can often research in advance)

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Problem questions (to surface dissatisfaction)

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Implication questions (to quantify the cost of the problem)

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Need-payoff questions (to get them to state the value of solving it)

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The one implication question I will ask, then go silent

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### Worksheet: Current State vs Future State Map

For a real or recent prospect, fill both columns in concrete terms: facts, feelings, and business impact. Then write the gap and the root cause underneath.

Current state: facts (in numbers)

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Current state: emotional experience

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Current state: business impact (money and time)

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Future state: facts (in numbers)

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Future state: business impact (money and time)

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The gap, expressed in time and money

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The root cause my work actually addresses

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### Exercise: Five Whys to the Root Cause

Take a symptom a prospect commonly reports and ask why up to five times until you reach a root cause you can sell against. Repeat for a second symptom.

- Starting symptom and your five why answers in sequence?

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- What is the root cause, and how is it different from the symptom you started with?

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- How does selling to that root cause change your offer and reduce competition?

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### Checklist: Active Listening On-Call Checklist

- I asked permission to record at the top of the call
- I let the prospect talk more than half the time
- I mirrored a key phrase to make them elaborate
- I labeled an emotion to show I understood, not just heard
- I stayed silent for a full five count after my hardest question
- I captured the exact numbers and phrases I will quote back later

## Money, Authority, and Objections

Script the budget conversation, the decision-process questions, and your response to each common objection.

### Worksheet: Your Budget Question, Five Ways

Adapt each of the five budget-question styles to your own voice and service. Pick the one or two you will default to, and write the price ranges you will anchor with.

Direct ask wording

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Range anchor wording (with my actual price ranges)

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Investment frame wording (tied to the cost of their problem)

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Permission ask wording

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Two-option probe wording (quick fix vs overhaul)

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My default question and my value-based framing sentence

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## Worksheet: Authority and Timeline Qualifier

Write the process questions you will ask to map the decision without insulting your contact, and define what a real compelling event looks like for your prospects.

My question to reveal who else weighs in

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My question about how they have made similar decisions before

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My question about their approval process if we agree it is a fit

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My offer to join a call with the economic buyer (exact wording)

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What counts as a real compelling event for my typical client

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My end-of-call qualification read (problem, budget, authority, timeline)

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## Exercise: Build Your Objection Response Bank

For each of the four objection buckets, write your acknowledge-question-respond sequence. Practice the price objection aloud until it is calm and automatic.

- Price (too expensive): your acknowledge, your clarifying question, and your scoped-phase response?
  - Timing (not now) and Trust (will this work): your responses, including the proof or pilot you would offer?
  - Competition (talking to others): how do you reinforce the unique root-cause insight only you surfaced?
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## Checklist: Money Conversation Checklist

- I quantified the cost of the problem before discussing my price
- I asked the budget question directly and did not flinch
- I framed my fee against the cost of the problem, not as an hourly rate
- I identified whether my contact is the economic buyer
- I confirmed a real timeline or compelling event
- When I heard too expensive, I changed scope rather than dropping my rate

## Close, Follow Up, and Improve

Lock the next step on the call, run a value-led follow-up sequence, and score every call to lift your close rate.

## Worksheet: Your Summary Close Script

Using a real prospect's words, draft the summary close: play back their problem, its cost, and their desired future state, then propose the specific next step.

The problem, in their words

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The cost of the problem, in their numbers

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Their desired future state

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The specific next step I will propose

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The two times I will offer to book that next step

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My exact ask, after which I will stop talking

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### Worksheet: Post-Call Scorecard

Complete this within two minutes of ending a call. Rate each item from 1 to 5 and write one thing to change next time.

Set upfront contract and controlled the agenda (1-5)

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Prospect talked more than I did (1-5)

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Quantified the cost of the problem in real numbers (1-5)

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Discussed budget directly (1-5)

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Ended with a specific scheduled next step (1-5)

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One thing I will do differently on my next call

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### Exercise: Design Your Follow-Up Sequence

Map your five-touch follow-up so qualified deals do not go cold. For each touch, decide the timing, the value you will lead with, and the ask.

- What goes in your same-day recap email (problem, cost, solution, next step)?
  - What value-add will you lead with on the day 5 to 7 nudge instead of just checking in?
  - What is your final polite decision-check message, and when do you move them to monthly nurture?
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### Checklist: Pipeline and Metrics Checklist

- I log every call and follow-up in a CRM or structured tracker
- I calculate my show rate, qualification rate, next-step rate, and close rate monthly
- Every follow-up leads with value before it makes an ask
- I review at least two call recordings each week, one win and one loss
- I have identified the one habit hurting my close rate and am working on it
- I move unconverted but qualified leads into nurture rather than dropping them

### Your Action Plan

1. Write your five-criteria fit scorecard and set the score that earns a call.
2. Attach a five-question intake form to your booking link and turn on an AI notetaker.
3. Memorize the five-part agenda and rehearse your upfront contract aloud until it is natural.
4. Build your SPIN question bank and pre-research situation answers so you can focus on implication.
5. Pick and practice your default budget question, anchored to the cost of the problem.
6. Draft your acknowledge-question-respond answer for price, timing, trust, and competition objections.

7. On your next real call, run the full agenda and book a specific next step before hanging up.
8. Send a same-day recap email and set up your five-touch follow-up sequence in a CRM.
9. Score every call on the post-call scorecard within two minutes of finishing.
10. Each month, calculate your close rate, review two recordings, and fix the one weakest habit.











