



TAKE YOUR DEMO CALL TO THE NEXT LEVEL

Worksheets

[Click here to go to the article with details on how to use this worksheet.](#)

ADAPTING YOUR STYLE

Instructions:

Think about the two types of prospects that you need to present to - the Power User and the Economic Buyer. List everything a Power User and Economic Buyer would want to know about your solution.

POWER USER (end-user):	ECONOMIC BUYER:
Think about the value of your solution and how it will help them day-to-day. Go into the features and benefits of your solution.	Think about how you are addressing their needs and pain points and what the ROI of your solution is.



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Instructions:

Use this worksheet to help you adapt your style to your prospect.

<p>If you are on a call with just the Power Users, what will you focus on?</p>	
<p>If you are on a call with just the Economic Buyers or decision-makers, what will you focus on?</p>	
<p>What if you have both sets of stakeholders on the call, how will you manage expectations and your agenda so that you can address the needs of everyone attending?</p>	

Instructions:

Use this worksheet to help you adapt your style to your prospect.

<p>How can you get your Champion on board to help you co-navigate through this situation?</p>	
<p>Based on your instincts and experience, what is the best way to manage this situation?</p>	
<p>What will you do if one stakeholder tries to throw the agenda off track?</p>	

HOW MUCH SHOULD YOU TALK?

Instructions:

Use this worksheet to map out how much time you should talk during Discovery.

Think back to your last 10-15 sales calls. How much time did you talk compared with the prospect?

What do you think are the advantages to letting the prospect talk 50% of the time?

- 10% me, 90% prospect
- 20% me, 80% prospect
- 30% me, 70% prospect
- 40% me, 60% prospect
- 50% me, 50% prospect
- 60% me, 40% prospect
- 70% me, 30% prospect
- 80% me, 20% prospect
- 90% me, 10% prospect

UNDERSTANDING THE PROSPECT

Instructions:

Use this worksheet to understand what's driving your prospect's questions and how to follow up on the answer.

What are some ways you can ask a prospect what's driving their question?

Write down some follow-up questions you can use to probe further and uncover the motivation behind their question

Example: Just curious as to what prompted you to ask that question?

UNCOVERING THA PAIN

Instructions:

Use this worksheet to help you uncover the pain of sticking with the Status Quo during your next conversation.

What is the pain they are experiencing?	What are the consequences of the pain?	What is the consequence of the status quo?



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Instructions:

Use this worksheet to help you uncover the pain of sticking with the Status Quo during your next conversation.

What's working with their current solution?	
What's not working?	
How can you quantify what's not working?	
What's the impact of sticking to this solution?	
What is the difference or delta between their current-state and the future-state (with your solution)?	
How can you articulate that?	



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GETTING INSIDE YOUR PROSPECT'S HEAD

Instructions:

Use this worksheet to help you find out what prospects are thinking.

What are some reasons why you don't ask your prospect what they think about your solution?

What are some ways you can ask your prospect about their thoughts regarding your solution and how it compares to their existing one?

What are some ways you can ask your prospect about their thoughts regarding your solution and how it compares to your competitors'?

FOCUSING ON THE END GOAL

Instructions:

Use this worksheet to help you focus on what your prospect is struggling with. Think through your last sales call:

What pain did you uncover that your prospect was struggling with?	
What are some additional questions you could have asked to better understand their pain and the impact of their pain?	
If it was an inbound lead, what were they looking to solve for?	
If this was an outbound generated lead, your prospect may not be aware that they have a problem or that there is a 'better way'. How can you approach this conversation in a way that can make them aware of a problem or challenge that may exist?	



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**HOW LONG THE DISCOVERY SHOULD
BE?**

Instructions:

Use this worksheet to help you determine how long Discovery should last.

Do you focus on enterprise or transactional sales?	
What is your typical deal value?	
How much time does it typically take to close a deal of this size?	
How long do you need to get through all the questions you need to ask during Discovery so that you can put together a custom solution for your prospect?	



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Instructions:

Use this worksheet to help you determine how long Discovery should last.

How long do you typically spend on Discovery?

Is it longer or shorter than the time you actually need? Why?

How can you frame your Discovery so that the prospect understands it is in their best interest to go through this process with you and that it will enable you to come up with a solution that is tailor-made for their needs?

CHECKING IN DURING DISCOVERY

Instructions:

Use this worksheet to help you plan out how to handle a prospect who is impatient or short with you during a Discovery call.

<p>On average, how long does Discovery need to last in order for you to get a good grasp of what your prospect needs and to fully understand the pain they are experiencing?</p>	
<p>What are some signs that your prospect might be getting impatient or annoyed?</p>	
<p>What are some talk tracks you can use if someone is growing impatient with your Discovery?</p>	



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LISTING DISCOVERY QUESTIONS

Instructions:

What are some things you need to ask your prospect during Discovery? Make a list of all the potential questions you want to ask your prospect and/or champion.

FOR EXAMPLE:	YOUR QUESTIONS
<ul style="list-style-type: none">- What is your timeline for making a decision and implementing a solution?- Who are the stakeholders?- Who else is going to be part of the decision-making process?- Who will be making the final decision?- How will the final decision be made?- Who are the influencers?- Who are the approvers?- Who are the end-users?- Who else needs to see this?	

Instructions:

What are some things you need to ask your prospect during Discovery? Make a list of all the potential questions you want to ask your prospect and/or champion.

How can you engage with the various users, influencers, and decision-makers?

UNDERSTANDING THE IMPACT OF THE PAIN

Instructions:

Use this worksheet to help you keep it conversational during Discovery.

What are some 'deposits' that you could make during Discovery?

FOR EXAMPLE:	YOUR LIST
<ul style="list-style-type: none">- Let them know they are in good company.- Share a 'Customer Story Soundbite'.- Unpack what they say using the conversation funnel:<ul style="list-style-type: none">- Paraphrase- Unpack using follow up questions- Uncover the problem or the pain- Get clear on the impact of the pain- Quantify the pain - what is the actual cost to the business?- How can you use this information to overcome any price objections your prospect might have?	

Instructions:

Use this worksheet to help you keep it conversational during Discovery.

What are some questions you can ask a prospect to help uncover a problem or pain?	
What are some questions you can ask a prospect to get clear on the impact of the pain?	
What are some questions you can ask a prospect to help you quantify the pain?	
What do you need to know in order to convert this into an actual cost to the business?	

**“MACHINE GUN QUESTIONER”
CHECKLIST**

Instructions:

Use this worksheet to help you evaluate if you are a “Machine Gun Questioner” and what to do about it.

Do you sometimes find yourself rattling off 3-5 questions all in one breath? Are you a “Machine Gun Questioner”?

- Yes
- No
- Sometimes

What typically happens after you rattle off 3-5 questions at your prospect? Do they usually answer all of them?



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Instructions:

Use this worksheet to help you evaluate if you are a “Machine Gun Questioner” and what to do about it.

Listen to 5 of your prior sales calls. Were you a Machine Gun Questioner on any of them?

- No
- Yes, on all of them
- Yes, on some of them

Use the space below to create a format and process to ask questions one at a time

STAYING PRESENT

Instructions:

Use this worksheet to help you craft a strategy to stay present on your sales calls.

Tip: Some ideas include: writing down notes, reflecting back on what you heard, or asking follow-up questions.

What does being present as a sales rep mean to you?	
How do you know when you are being present?	
How do you know when you are not being present?	
How can you help yourself stay present?	



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STAYING CURIOUS

Instructions:

Use this worksheet to help you craft a strategy to stay present on your sales calls.

What does being naturally curious as a sales rep mean to you?	
How do you know when you are being naturally curious?	
How do you know when you are not being naturally curious?	
What strategies can you implement to help yourself stay present and naturally curious with your prospect?	



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UNDERSTANDING INDIVIDUAL DRIVERS

Instructions:

Think back to the last 3 sales calls you had; what were the individual drivers prompting your prospect's questions? How did you discover this?

Call 1	
Call 2	
Call 3	

Instructions:

Make a list of questions you can ask during Discovery to help you drill down on the individual drivers behind your prospect's questions and decisions.

Remember to include questions about their numbers and other metrics that they might find important.

YOUR LIST

UNDERSTANDING THE DECISION- MAKING PROCESS

Instructions:

Use this worksheet to help you understand your prospect's decision-making process.

<p>When will you ask the prospect what their decision-making process looks like? (at the start or at the end of Discovery)?</p>	
<p>How will you ask them?</p>	
<p>What type of follow up questions can you ask them based on their response?</p>	

Instructions:

Map out some common responses you hear to this question: “What is your decision-making process like?” and write down some corresponding follow-up questions you can ask to move through the funnel.

TYPICAL RESPONSES TO ‘WHAT IS YOUR DECISION-MAKING PROCESS LIKE?’	FOLLOW-UP QUESTIONS YOU CAN ASK
	<ul style="list-style-type: none">- Who makes the final decision?- What’s your timeline to make a decision?- Do you already have a budget set aside?- Where are we with regards to your decision-making process?- What is the criteria for decision-making?- How are each of these criteria weighted?



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DETERMINING HOW YOU STACK UP

Instructions:

Use this worksheet to determine how you stack up.

<p>What's the best way to ask your prospect if they are meeting with other providers?</p>	
<p>How can you ask them when those meetings will be?</p>	
<p>What's the best way to ask where they are in the process with those providers?</p>	

SECURE ANCHOR POSITION

Instructions:

Use this worksheet to determine how to secure an anchor position with every prospect you meet with.

<p>What's a good way to ask your prospect who else they are scheduled to meet with and when?</p>	
<p>How can you suggest to your prospect that they schedule a short 15-30 minute 'placeholder meeting' with you before they meet to make a decision?</p>	
<p>What is the value of this meeting for them?</p>	

STEPPING OUTSIDE YOUR COMFORT ZONE

Instructions:

Use this worksheet to help you step outside your comfort zone. How can you push yourself outside your comfort zone during Discovery?

POTENTIALLY SENSITIVE QUESTIONS	PREAMBLE TO SHARE

Notes:

A large rectangular area filled with a light grey grid pattern, intended for taking notes. The grid is composed of small squares and is enclosed by a thin grey border.

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