

discovery call script

Print or fill in.

Discovery call script

Time: 60 to 90 minutes **Covers:** the spoken version of forms 01, 02, 03, 04 and 08 **Before you start:** Form 00 filled in as far as you can get it alone

Do form 00 first. This call goes badly if you spend it asking things you could have found out yourself, and it goes well if you spend it confirming what you found.

Before the call

- Recording tool tested, not just opened
- Form 00 filled in, with your gap list to hand
- This script open, so you can follow rather than remember
- Ninety minutes clear, and tell them it might take that long

Opening

Start recording before the conversation properly begins.

"Before we get into it, I record these so I can build your notes properly instead of scribbling while you talk. Is that alright?"

Wait for the answer. It is now captured in the same file as the conversation.

"This is going to be a lot of questions, and some of them will sound basic. That is deliberate. I would rather ask something obvious than assume it."

Then put the pen down. Do not take notes. The recording is taking notes. Your job is to notice.

1. The business itself

Form 01

- Tell me what the business does. Say it the way you would to someone at a counter.
 - How long have you been doing this?
 - What were you doing before?
 - Why did you start it?
 - How many people, and who does what?
 - Who can make decisions without asking you?
 - Is there anything only one person knows how to do?
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2. What you sell

Form 02

- What do you sell? Start with whatever brings in the most money.
 - What else?
 - Which of those do you actually enjoy?
 - What do people ask for that you do not do?
 - What do you turn down, and why?
 - Does any of it depend on the season or the weather?
 - How much can you take on at once? What is the thing that limits it?
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3. The work itself

Form 04. Slow down here. This is the richest part of the call.

- Walk me through a typical {{THE_WORK}}, from agreed to finished.
- How long does that take? And when it goes badly, how long?
- What has to be in place before you can start?
- What happens when you start without it?

- Where does it most often go wrong?
- What do you do when it does?
- What separates a good one from an acceptable one? Would somebody outside the trade notice?
- Who decides it is finished?
- What do you leave them with?

Ask "and then what happens" repeatedly. People compress the middle of a process without noticing, and the compressed part is usually where the real work lives.

4. Who buys

Form 03

- Describe a typical {{CUSTOMER_WORD}}.
 - Are there different types? How do they differ?
 - Who is your best one? Not biggest. Best.
 - Who do you regret taking on? What was the early sign you ignored?
 - Why do people choose you rather than someone else? What do they say?
 - Why do they leave?
 - How do they usually find you?
 - What do they push back on? Give me their words.
 - What do you say back? Does it work?
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5. What people ask

Form 03

- What question do you answer over and over?
- What do people always get wrong about you?
- What do you get asked that you would rather not?

6. When it goes wrong

Form 10. Ask this once they are comfortable, not at the start.

- What goes wrong most often?
 - How do you find out?
 - What do you do about it?
 - Has a complaint ever changed how you work?
 - Is there one that still bothers you?
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7. Words

Form 08. Ask this throughout, not only here.

Every time they use a word you do not know, stop and ask. Do not save it for the end.

- You said {{term}}. What does that mean exactly?
 - Is that what everyone in the trade calls it, or is that yours?
 - What do you call the people who pay you? Do you mind the other word?
 - Is there any word about your business that makes you wince?
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8. Confirming the research

Form 00. Confirm rather than ask.

Go through your gap list as statements.

- You have thirty four reviews across two sites and I could not find a reply to any of them. Is

that deliberate?

- Your Google listing has the old hours on it. Does anyone have access to it?
- The website was last updated in 2021 as far as I can tell. Who built it?

This part sounds different from every other conversation they have had with someone selling to them, and it is the part they remember.

9. Closing

- What have I not asked that I should have?
- If one thing about the business got fixed tomorrow, what would you pick?
- Who else should I be speaking to about any of this?

That last question is how you find out that the person who actually knows the work, the books, or the safety file is somebody else. It is usually the most useful ninety seconds of the call.

After

- Stop the recording and confirm the file saved
- Transcribe within 24 hours, while you can still repair garbled words from memory
- Read it once, marking anything that surprised you
- Pull the vocabulary out first, into `_system/glossary.md`
- Note who each remaining form should go to, based on what you just learned