**Discovery Outcomes**

**Instructions**

1. In the section below, document the selected solution and Decision Influencer for this workshop.
2. Choose ALL the outcomes that make for a great discovery based on your foundation selections.
3. Only select the outcomes that must be achieved during discovery.
4. At the end of each section, add ones that were not addressed in the list.

**Discovery Outcomes Selection**

Solution: **XXXX** Market Segment: **XXXX** Decision Influencer: **XXXX**

***“It was a great discovery meeting if what was accomplished.”***

**I learned…**

1. What they know about our company and their perspective of it

2. How they heard about us (inbound lead)

3. Why they contacted us (inbound lead)

4. Why they accepted the meeting

5. The current providers

6. The solution provided by the current providers

7. Their satisfaction level with the current providers and their solution—what they like and dislike (and why)

8. Their pain points/challenges—why they are looking to make a change (or considering one)

9. What they have done in the past (and currently) to address their pain points/challenges

10. Who these pain points impact

11. How others are affected by these pain points

12. How others in the company feel about these pain points

13. If these pain points are inconveniences or problems

14. If they have definitively decided to make a change and clearly understand why

15. What they are presently paying their current providers

16. The payment terms with their current provider

17. The renewal provisions in their provider’s contract

18. Other providers under consideration

19. Their perspective of options provided by others under consideration

20. Their perspective on the right solution for their pain points/challenges

21. Who would be involved in making the decision

22. Their level of influence in the decision-making process

23. How others will respond to a solution change

24. Their timeframe to make a decision

25. Their timeframe for implementation/delivery

26. Obstacles that could prevent that timeframe from being achieved.

27. Their criteria for making a change in provider

28. The scope of the opportunity

29. The process they will use to determine the viability of a new solution

30. The process they will use to select a new provider

31. Their budget/funding source

32. Their current corporate goals and how we fit within them

33. Their future corporate strategy initiatives and how we fit within them

34. The priority of this initiative relative to other initiatives

35. Their personal goals and how we fit within them

36. The business drivers associated with our solution

37. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

38. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

39. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

40. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

41. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

42. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

43. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

44. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

45. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

46. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

47. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

48. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

49. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

50. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**I also…**

1. Qualified the opportunity for size and scope to determine if this is the right fit for our company

2. Identified solution criteria

3. Shared relevant company background information

4. Shared relevant product/solution information

5. Positioned relevant differentiators and those differentiators matter to the Decision Influencer(s)

6. Positioned our subject matter experts (SMEs)

7. Toured their facility

8. Was introduced to others involved in making the decision

9. Scheduled another meeting/demo

10. Set defined action steps with a timeline

11. Gained interest in exploring a relationship with our company

12. Established trust and took the first steps toward building a relationship

13. Received a referral to other parts of the company

14. Received a referral to other companies

15. Gave them confidence in our ability to handle their account

16. Differentiated myself and provided meaningful value through *HOW you sell*

17. Transitioned their emotions to our intended desired ones

18. Acquired information needed to conduct an effective demo

19. Acquired information needed to construct a proposal

20. Showed appreciation for them meeting with me

21. They received meaningful value and thought it was a great use of their time

22. They are excited to continue conversations with me and our team

23. Demonstrated expertise in my industry

24. Demonstrated expertise in our company’s overall capabilities

25. Demonstrated expertise in the specific solutions we offer relative to their needs

26. Demonstrated expertise in their industry

27. Uncovered opportunities for other segments of our business

28. Challenged them to think differently about the solutions they have or could have

29. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

30. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_