**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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_