Discovery Meeting Form

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Key Meeting Objectives	(what are the top 2-3	critica	al outcomes of this meeting)		Am I Prepa	ared?	S A L E MANAGEI
1.		Have I done my research?					
2.					Have I set objection Is my meeting co		
2.					Do I have what		
3.							
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Company			Contact		Titl	е	
Street							
City				State	Zi	ip	
Phone Fax					Ξ.		
E-mail				Web URL	-		
Identify the Economic	Buyer, User Influen	cer(s)), Technical Influencer and	chose an Ally	y or a Supporter		
Name	Title		Phone		Email	Decision	on/Influence
La anno allo and disallo banalo		- 1					
Busine		snee	et for answers if necessary Systems/Services		Goals/P	roblems/\	/ision
 Ask clarifying questions regarding their business and industry that arose from your preparation research. What has made your company successful? What are keys to your success? Ask questions that will help you understand more about their business success factors based on last 		 If you are replacing a system or service find out what they like and dislike about current system/service. What do you want to make sure does not change? What are the most important characteristics you appropriate from your boot younger? 			•What problems are your current system/service causing? •What challenges is your company facing that a new system/service could help change? •What do you envision changing with the purchase of the right system/service?		
question. •What are the greatest challenges you are facing today? •What strategies, initiative or objectives are you		appreciate from your best vendors? •Could you explain to me how your buying process works? •			•What do you want to make sure is avoided with this purchase? •What would be your wish list of improvements in		
anticipating our system/service will support?					business operations, performance, customer service, sales, etc by purchasing our system/service?		
Notes/Questions:		•					
Promises Made / Act	ion Items						

Critical Areas to Understand Before Preparing Solutions

Buying Motives	Vendor Preferences	Key Problems/Pain		
Customer Goals	Budget Allocation	Time Lines		
Customer Buying Process	Challenges	Other Customer Objectives		

Your Company System or Service Design Criteria Notes