The Discovery Process

Selling with Confidence

Hire ❖ Develop ❖ Retain

Overview

Discovering Your Discovery Style

Our natural discovery style will be the style that feels most comfortable to us, and it may or may not be the most effective style. It's important to know what works in your style and where there is opportunity for improvement.

Activity One – Current Discovery Process

How do you move through a typical discovery conversation?	
What is effective in your discovery style?	
Where do you see opportunities for improvement?	

Discovery Styles

- The Beeliner
    - Jumps to quick conclusions and rushes to the recommendation
- The Conversationalist
    - Focuses solely on having a conversation, no clear plan to extract required information
- The Aimless Traveler
    - Asking some valuable questions, but often going down the wrong path
    - Spends a lot of time redirecting the conversation
- The Interrogator
    - Asks many questions, mostly centered around gaining the critical knowledge required to make a recommendation
- The Educator
    - Focuses the conversation on teaching and sharing insights versus listening and learning
- The Navigator
    - Has a clear beginning and end point to the discovery conversation
    - Focuses on helping the client move through the process to self-realization while gaining the insights needed to create a recommendation

Types of Discovery Questions

A typi9cal discovery conversation is made up of questions and answers. The types of questions asked garner different responses and therefore different insights. Discovery is most effective when the right types of questions are asked at the right time. We'll explore the 4 main types of discovery questions.

Close Ended vs Open Ended

- Close Ended
    - Can only be answered with yes or no, or a very limited answer

- Begin with words:
  - Are, Can, Could, Do, Does, Did, Have, Is, Should, Were, Will, Would
  - Who, Where, When, Which can also be used
- Used to check for understanding

- Open Ended
  - Cannot be answered with yes or no
  - Begin with words:
    - How, What, Why
  - Used to gain deeper knowledge

Activity Two – Change Up

Write down the 5 most common questions you ask.

1.

2.

3.

4.

5.

Determine if they are close ended or open ended and write each on their own separate line in the coordinating box. For each close ended question you ask, change it to an open-ended question. Once you have all open-ended questions, create a close ended clarifying question as a follow up

CLOSE ENDED	OPEN ENDED	CLOSE ENDED CLARIFYING

Fact Finding vs High Impact

- Fact Finding
  - Questions that don't require deeper thought to answer
  - Rote responses
  - No emotion/impact in the answer
  - Used to gain information required to create a recommendation
- High Impact
  - Questions that require more thought to answer
  - Answers elicit emotion and/or demonstrate impact
  - Used to bring the client to a place of self-realization

Activity Three – Which is Which

Return to activity two and determine if the open ended questions written are Fact Finding questions or High Impact Questions.

Effective Listening

Whether we're engaging in conversation in our personal life or in our professional life, listening effectively to the speaker is paramount. Let's define listening.

Active Listening

- The practice of preparing to listen, observing what verbal and non-verbal messages are being sent, and then providing appropriate feedback for the sake of showing attentiveness to the message being presented.

Passive Listening

- Little more than hearing
- Listening without reacting: allowing someone to speak, without interrupting.
- Engaging in an inauthentic way

Effective Listening

- All of the elements of active listening partnered with a desire to deeply understand the speaker and ability to recall information that can then be used to better serve the speaker
- Requires the listening to be authentically engaged and present in conversation
-

In discovery, we will listen for many things: Goals and Challenges, Information to build a recommendation, Pain/Gain to tie the recommendation back to, Timing and Decision Making Criteria, Buying Motivations. But we mostly need to be listening for the information and buy-in from the client that will earn you the right to make a recommendation.

Listening effectively builds trust with our clients, makes them feel heard and validated and allows us to confidently bring more value to them.

The Rules of Engagement

When completing discovery, there are some basic rules of engagement that any strong salesperson should follow for the most open and effective discovery.

Give and Take

- Balance giving and getting information throughout the conversation

Challenge Them

- Ask high impact questions that make them think and challenge them professionally

Don't Over Educate

- Don't let your prospect turn this discovery session into a free training session

Let them Answer

- Ask short questions and let them speak. No leading the witness or answering the question for them.

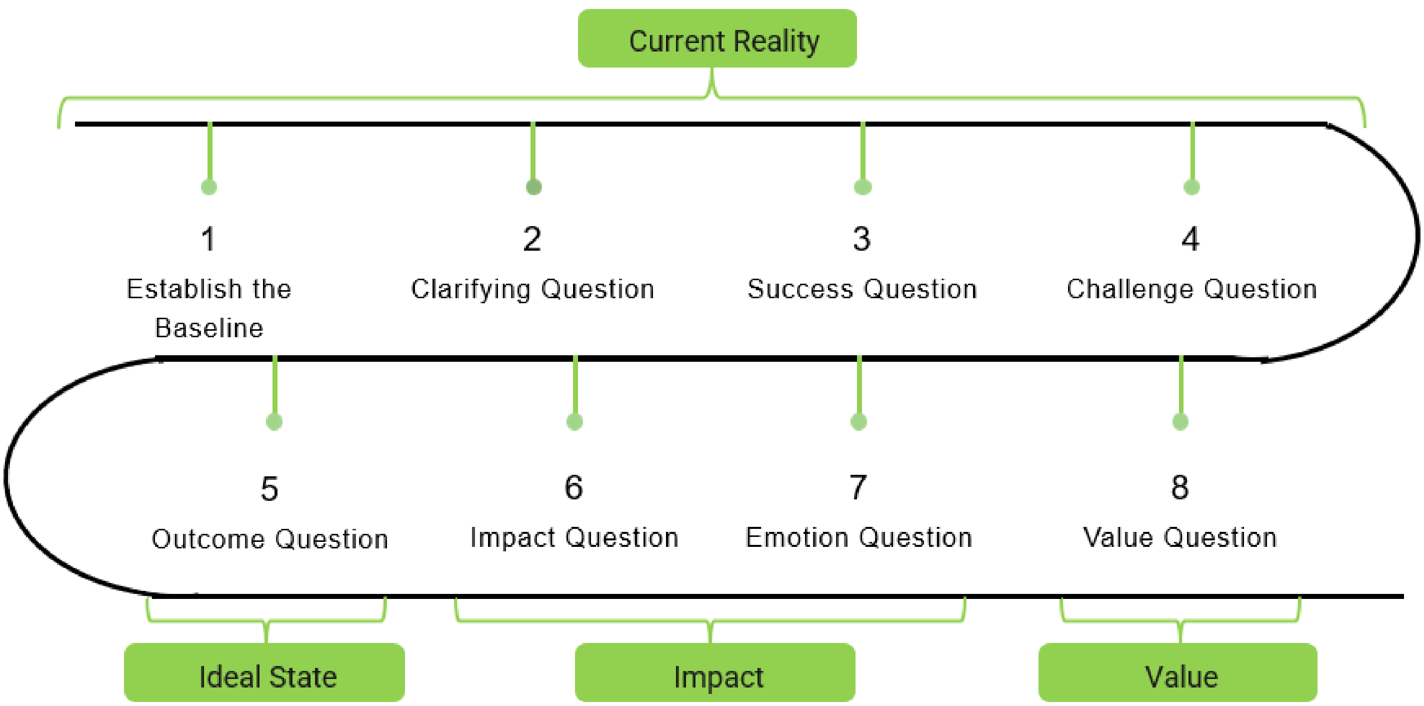
The Value-Driven Discovery Process

The discovery process must be just that – a systemized, easily repeated process that moves a client from simply identifying needs to creating urgency to solve problems or reach goals. By systematically combing fact finding and high impact questions, the roadmap for the salesperson and the client becomes clear.

The process can be complex or simple, short or long, and can be done once or multiple times to uncover multiple needs. But the four pillars of discovery are the following:

FACT FINDING		HIGH IMPACT	
CURRENT REALITY	IDEAL STATE	IMPACT	VALUE
Determine what's currently going on	Determine what needs to be going on	Uncover the pain or gain	Understand what it means to them

The four pillars can then be broken down into an 8-question talk track that provides turn-by-turn direction for the conversation facilitator and the client.



The Specifics

Each question in the process serves a specific purpose, and each drives to the next question. There are ties when clients will move through multiple steps at one time, but no step should be skipped and the order of the process should not change.

1. Establish the Baseline
   a. Kick off the discovery conversation by asking a question or making a statement that recalls known information and allows for an expansive answer
2. Clarifying Question
   a. Ask for an example or further clarity to understand more specifically about a challenge or goal
3. Success Question
   a. Inquire about positive things regarding their current practices/solutions that allow you to learn what they like or what is benefiting them currently
4. Challenge Question
   a. Inquire about their challenges or things that are not going well. This will allow you to know where the largest gaps are
5. Outcome Question
   a. This is the time to determine what their desired situation, ideal state or end goal would be.

6. Impact Question
    a. This question is critical and helps to widen the gap between what's currently going on and what they need to see changed. This helps bring them to a place of self-realization and increases urgency
7. Emotion Question
    a. There is personal motivation behind every professional challenge. Find out what the stakes are for your client individually.
8. Value Question
    a. Finally, understand what a resolution would mean to them. This is where the buy-in occurs and allows you to move into a recommendation.

Key Takeaways

Discovery should be a two-way conversation that allows the salesperson to gain knowledge ad the prospect to reach a place of self-realization that there is not only a problem to solve, but it must be solved now and that help with be required to close the gap between the current and ideal states. When considering a discovery conversation, the focus should be on how you can help. When that is your focus, and a process is followed, you'll gain much more comprehensive information and build deeper trust with your client.

Practice Makes Permanent

- Practice the talk track until it's comfortable
- Focus on asking open-ended, quality questions that allow you gain valuable insight

Make 'Em Think

- Ask stimulating questions that cause them to reflect before responding

Talk Less, Smile More

- Listen to understand vs listening to respond
- Pay close attention to be able to recall details

Stay Engaged and Neutral

- Be present
- Avoid jumping to conclusions or rushing to share your solutions

Corporate Membership

Compensation

Compliance

Background Screening

Recruiting & Talent Acquisition

HR Consulting

Training

Leadership Development

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