

DISCOVERY QUESTIONS TEMPLATE

Meet The Customer Where They Are

- Build Trust -

Before You Guide Them Where They Need To Go

- Build Credibility -

01

Customer's Current State

Take The Customer's Temperature - Don't Guess

To determine where you only have to confirm value & where you have to create value, you first need to determine the customer's buying vision.

“What are you hoping to accomplish?”



PAIN

“What are the challenges that are holding you back?”

“Why is that important to you?”



GAIN

“What are the expected outcomes?”

“Why is that important to you?”

Challenges/Reasons

Expected Outcomes/Reasons

X- Because ...

- ✓ Let the customer talk themselves out to reduce resistance.
- ✓ Encourage customer to prioritize challenges/ outcomes.

02

Confirm Value

Buying Vision Is On Target – Insight Is Not Needed

When customers understand their problems, salespeople only need to ask generic questions to confirm value, because customers know where to find the answers.



PROBLEM:

Evidence: “What constraints are stopping you from achieving your goal?”

Impact: “What’s the financial impact?”

Confirm: “So, if I understand your situation correctly...”



SOLUTION:

“How have you tried to solve this in the past? What’s changed?”

Evidence: “Would it help you to (achieve your goal), if you had the ability to (briefly describe capability)?”

Impact: “What % do you feel this capability could reduce the cost of (current problem)?”

Confirm: “So the potential value of this capability could be \$X?”

03

Create Value

Buying Vision Is Off Target - Insight

When customers don't fully understand their problems, salespeople must ask directed questions that lead customers to the answers. These questions create value by shining the light of insight on unrecognized or misunderstood problems.



PROBLEM:

Evidence: Customize questions to show how it's a problem in the customer's company.

Impact: Customize questions to show How Much? How Often? Cost?

Confirm: Summarize customer's answers.



SOLUTION:

Same as generic questions in column two

On the next page, see the customer story and the customized questions.

Create Value: Example of Customized Insight Directed Questions



First The Story & Then The Questions

The questions are easy to create and deliver on the fly with customers when you first know the story behind the questions (click <https://youtu.be/Zyn41P5PXDk> for a video of the story).

Trace, the owner of Omega Auto Parts, needed to know the true profitability of his sales.

The problem is that Trace purchases inventory from so many different sources, so he doesn't know the true cost of his inventory. He can buy the identical part, for instance, with as much as a 30% gross margin difference between a drop ship price with a 3-7 day lead time, and the price from a local warehouse because he's got to have the part delivered the same day. As a result of the different ways Trace acquires inventory, the real profit on many of his sales is unknown. And it remains unknown until the true cost of his inventory is reconciled at the end of the month on his balance sheet. Until that time his financials just don't add up. So for 29 days out of 30, Trace is operating in the dark hoping that somehow he'll be profitable at the end of the month.

Because Trace's business operates on razor thin margins, he realized that he needed to turn the lights on and expose the true cost of goods sold when one month a ½% swing in margin wiped out half his entire net profit.

So Trace was relieved to discover that ERP Software was able to provide a solution that allows for up to 14 different vendors costs per part. Now Trace's purchasing manager can create purchase orders with accurate costs. And Trace's financials finally match so he can run his business with confidence.

But that's enough about Trace, how do you measure the value for your COGS today?



Directed Insight Based Questions

Problem Questions:

Evidence:	How do you measure your COGS today? Do you buy drop shipments and also buy from local warehouses on the same line?
Impact:	What's the price difference?
Evidence:	Do you buy the same inventory from different suppliers at different prices?
Impact:	What's the price difference?
Evidence:	Do you need to make adjustments to the inventory value when you reconcile your financial statements at the end of the month? If so, how do you know your true cost of goods sold at the time of the sale?
Impact:	What effect can that have on your margins? What are your total sales? So it could be costing you \$x?
Confirm:	" So, if I understand you situation correctly..."



Directed Insight Based Questions

Solution Questions

How have you tried to solve it in the past? What's changed?

Evidence:	"Would it help you to determine your true profit if you had the ability to list 14 different vendor costs per part?"
Impact:	What % do you feel this capability could reduce the cost of not measuring your true COGS?
Confirm:	So the potential value of this capability could be \$X?

Template: Create Value With Insight Directed Questions



Problem Questions

E/I	EVIDENCE & IMPACT QUESTIONS

Confirm Question: “ So, if I understand you situation correctly...”



Solution Questions

How have you tried to solve it in the past? What’s changed?

Evidence Questions

Would it help you to (achieve your goal) [redacted] if you had the ability to (briefly describe what your capability does) [redacted] ?

Impact Question

What percent do you feel this capability could reduce the cost of (current problem) [redacted] ?

Confirm Question: So the potential value of this capability could be \$X?

Template: Create Value With Insight Directed Questions



Problem Questions

E/I	EVIDENCE & IMPACT QUESTIONS

Confirm Question: “ So, if I understand you situation correctly...”



Solution Questions

How have you tried to solve it in the past? What’s changed?

Evidence Questions

Would it help you to (achieve your goal) if you had the ability to (briefly describe what your capability does) ?

Impact Question

What percent do you feel this capability could reduce the cost of (current problem) ?

Confirm Question: So the potential value of this capability could be \$X?