



SUNCOAST SPARK · PITCH

Discovery Call Prep Worksheet

Prepare to learn what matters, uncover business impact, and
earn a meaningful next step.

Go in prepared. Come out knowing more.

Suncoast Spark · Free Resource for B2B Account Executives

Discovery is not about collecting answers to a list of questions.

Strong discovery helps the seller understand the buyer's situation — not confirm what the seller already believes. Before preparing your question list, anchor on what you are actually trying to learn.

Strong discovery helps determine:

The Problem

- Is there a meaningful problem?
- Who experiences it?
- What is the impact?

The Situation

- What is happening today?
- Why might change matter now?
- What would a better outcome look like?

The Path

- Who else matters?
- Is there enough reason to keep investing together?

**THE GOAL IS NOT TO COMPLETE YOUR QUESTION LIST.
THE GOAL IS TO UNDERSTAND THE BUYER'S SITUATION.**

What We Know Before the Call

Complete this before the meeting. Be honest about what is verified, what is a hypothesis, and what you genuinely do not know yet.

Account
Buyer
Role
Meeting Purpose

✓ Known

Verified account or buyer information.

~ Hypotheses

What we believe may be happening.

? Unknowns

What must be learned from the buyer.

Why Now Signal

What appears to have changed?

Relevant Proof

What customer example or evidence might become useful if the conversation supports it?

The Discovery Hypothesis

Write your hypotheses before the call. These are not facts. They are your best guess based on available information. The buyer will confirm, correct, or reframe them.

We believe the buyer may be dealing with:

Because:

The potential business impact may be:

The current approach may be:

The strongest reason this may matter now is:

The biggest assumption we are making is:

The most important thing we need to learn is:



Prepare the hypothesis. Then let the buyer change it. A hypothesis you hold too tightly becomes a pitch, not a discovery.

Questions Worth Asking

These are example questions — not a script. Choose the ones that fit the conversation. Do not attempt to ask every question. Listen for what emerges and follow it.

Problem

"What is happening today that made this worth discussing?"

Current Approach

"How are you handling this today?"

Impact

"What does that create for the business or team?"

Urgency

"What happens if nothing changes?"

Desired Outcome

"What would need to be different for this to be worth addressing?"

Stakeholders

"Who else sees this differently or is affected by it?"

Decision

"If you decided to change this, what would need to happen internally?"

Listen For

As the buyer speaks, evaluate the quality of what you are hearing — not just whether it sounds positive. Strong evidence is specific. Weak evidence is general.

✓ Strong Evidence

- Specific examples from the buyer's experience
- Measurable impact described in their terms
- Buyer-owned language — not echoing your framing
- Clear consequences if nothing changes
- Named stakeholders with defined roles
- Specific timing or deadlines
- Internal action already underway

☒ Weak or Incomplete Evidence

- Generic interest with no specifics
- "Nice to have" language
- Urgency you created, not the buyer
- No clear impact on the business
- Unknown or unnamed stakeholders
- No commitment to a next step
- Vague or deferred next steps

If you are hearing mostly weak evidence, that is itself important information. Do not force a strong signal where one does not exist.

The Meeting Outcome

Define what you are trying to know by the end of this conversation — before the call starts. This sharpens your listening and makes a clear next step easier to earn.

**At the end of this conversation, I
want to know:**

**If there is a real problem, the logical
next step may be:**

**If there is not enough evidence, the
right next step may be:**

A good discovery call can legitimately end with any of the following. Not every call should advance to a demo.



Advance

Clear problem, impact, and a defined next step.



Gather More Evidence

Promising signal, but not enough to move forward yet.



Involve Another Stakeholder

Right problem, wrong room.



Nurture

Real interest, but not the right moment.



Stop Pursuing

No meaningful problem or reason to change.

Prepare the hypothesis. Then let the buyer change it.

AE on Demand helps account executives use company context, account research, and prior conversations to prepare discovery, analyze what was learned, identify gaps, and decide what to do next — inside ChatGPT or Claude.

What AE on Demand helps you do

- Build a discovery hypothesis using account and buyer context
- Analyze what was actually learned from a conversation
- Identify gaps and missing evidence before the next step
- Decide what to do next — and get help doing it

[Explore AE on Demand at aeondemand.com](https://aeondemand.com)

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