Exploratory Call Playbook

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| **INSTRUCTIONS**  This playbook will help you run better exploratory calls. To use it either:   1. Copy and paste the playbook below directly into a call note in the HubSpot CRM and add notes to it from there OR 2. Use File > Make a Copy from the main navigation above to make an editable copy of this document and add notes right within it OR 3. If you are a HubSpot Sales Enterprise user, create a new Sales Playbook using the content below. |

# Call Overview:

Below is the typical structure of an exploratory call. The primary objective of the call is to explore whether your prospect needs help (is there a meaningful gap?) and whether you can help (is there a fit?).

1. [Introduce the call](#q9g2akxi81sh)
2. [Understand the current situation](#lxpbacwd6t7t)
3. [Understand goals and timing](#wttswroann6o)
4. [Understand plans and challenges](#3fo8yu67y1od)
5. [Share tips and ideas](#9kknko49ht8c)
6. [Discuss value and budget](#u3fd066xry49)
7. [Close the call](#ne5349xxer4k)

Tailor your delivery based on the specific needs of your prospect.

# Introduce the Call

* *Recap what led to this meeting*
* *Set your agenda - generally to 1) learn about the prospects business and goals, 2) share some tips and ideas, 3) check to see if there is a mutual fit to continue the conversation, and then 4) discuss next steps*
* What do you (the prospect) hope to get out of the meeting?

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* *Ask permission to add the prospect’s objectives (gathered in the last question) to the agenda for later and to begin the call by learning about their business first. Don’t take the cheese of starting with tactics first!*

# Understand the current situation

*In this section, understand the basics of your prospect’s business and organization. Below are some example questions you can use to relate your solutions to your prospect’s problems. The examples below are often used for selling B2B services.*

* I reviewed your website, but I'd love to hear it from you, tell me a little about your business?

*Look to get a high level understanding of their business model and market.*

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* What does your ideal customer look like?

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* Tell me a little about your [specific department] organization?

*Look for clues about the organization, your contact’s role within it, how well the teams function, are they growing, etc. ?*

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*Additional questions for consideration* [*here*](https://docs.google.com/document/d/1sg4FGPUbJFb2haOVpy5Sc0Ky1S-mG6-6mBdOX6rUPkw/edit#heading=h.tag4tbpmxjij)*.*

# Understand goals and timing

*In this section, understand your prospect’s business goals and timing. (L1 = basics, L2 = specifics, L3 = meaningfulness/significance)*

* What are some of the initiatives your department is working on this year/quarter? (L1)

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* Tell me more about those? (L1)

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* a. How will you measure the success of your efforts? (L2)

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* and/or If you close your eyes and imagine it, what would success look like in 12 months? (L1/L2)

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* Have you set specific targets? (L2)

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* What is the significance of that/those targets? (L3)

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* In regards to your initiatives, what is the most important date on the calendar? (L2)

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*Additional questions for consideration* [*here*](https://docs.google.com/document/d/1yvLxiqCeKapzaxnSVWZjpOy5xZzoJd1atvI2AuMk-lg/edit#heading=h.2et92p0)*.*

# Understand plans and challenges

*In this section, proactively identify - and gracefully challenge when appropriate - the prospect’s alternatives.*

* What are some of the other things you are thinking about to help you get to your goals?

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* How are you feeling about those?

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* If we weren’t talking today and you were to continue doing the same things you are doing or planning now, how close would you come to reaching your goals?

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*Additional questions for consideration* [*here*](https://docs.google.com/document/d/1yvLxiqCeKapzaxnSVWZjpOy5xZzoJd1atvI2AuMk-lg/edit#heading=h.tyjcwt)*.*

# Share tips and/or ideas

*In this section, share some tips and/or ideas to establish credibility and build excitement*

* *Ahead of the call, research a few tips or ideas based on what you see from their website/information you’ve gathered from your prospect ahead of the call.*
* *Tips should be simple and actionable and ideally produce an aha moment. To help make it actionable, consider prefacing a tip with…“There are a lot of things you could do to [ hit the goals they mentioned in the earlier section], but here is one simple thing you could do today, even without us, to start having an impact”*

# Discuss value and budget

*In this section, address the pricing question, even if it hasn’t been raised yet. Also, position the value of investing in your offering.*

* To achieve [specific goals discussed and why], what were you hoping to invest?

*This question presumes you’ve done a good job of getting specific, measurable, meaningful goals*

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* Would you like some advice? Whether you choose us or not, a firm of your size looking to [reach xyz goal] oftentimes invests the following in [the solution they’re looking for] :
  + Be sure to have this math ready
  + x% of revenue (generally 10% - can vary by industry)
* We charge $x for these services OR our pricing generally ranges from $x to $x. It can vary depending on your goals, timing, and resources. <pause><pause><pause>. Is that range similar to what you were expecting me to say?

# Close

*In this section, close the call strong.*

* *Summarize the goals and challenges you heard from your prospect*
* *Check for alignment*
  + How did I do summarizing what you are hoping to accomplish and why?
  + Is it right that you feel like you could use some help?
  + Would it make sense to suggest next steps?
* *Next steps*
  + *Something like...*What we’d suggest next is a meeting where we’ll help you come up with an approach to meet your goals. On our side, we’ll review what you shared today and bring back some ideas. We’ll also be prepared to help you translate your goals into achievable targets. And we’ll hope to get some input and feedback from you. Would a next step like that be helpful?
* *Homework*
  + Can I ask you to do a little bit of work prior to our next meeting? It will make our call more productive. It should take you about 15-20 minutes.
    - *Have your prospect gather some information for you that will be helpful in the next call*
    - *Have them review a video / case study / content to begin to see what your offering is about. Pro-tip: At the beginning of your next meeting, ask them what they thought of what you shared.*
* *Buying Process*
  + Let’s imagine things go well in our next conversations. Can you share with me what would happen next on your side?

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* + Does it make sense to include anyone else in our next meeting?

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