

Discovery Call Template by Flowla

1. Intro & agenda

- Opening statement
"Thank you for joining us today. We're excited to explore how Flowla can address your unique challenges."
- Setting the agenda
"Before we dive in, let's decide which scenario resonates with you: Closing, Sales Process Enhancement, or Insights & Playbook Refinement."

2. Discovery questions

- Engaging dialogue
"Our goal is to truly understand your needs. Can you share more about your product and your role?"
- Digging deeper
"Could you provide insights into your team's size and the tools currently in use?"
- Problem identification
"Let's talk about the main hurdles you face in generating and converting leads."
- Quantifying impact
"Can you share your average conversion rates for opportunities?"
- Root cause analysis
"What are the main factors that at times prevent deals from closing?"

3. Education and collateral

- Paradigm shift emphasis
"Buyers are seeking the '3As'— Availability, Affability, and Ability. Also, friction can be a deal-breaker."
- Punchlines for impact
"Did you know that 85% of the selling process happens internally? Or that 40% of potentially winnable deals are lost due to just five key reasons?"
- Success metrics
"Flowla's triumph lies in the fact that 93% of buyers express satisfaction with it when they receive a flow from their sellers!"
- Addressing pain
"Email often kills deals due to delays and miscommunication. While CRM is designed for sales teams, Flowla is the single source of truth - made for buyers."

Educational content (Use case-based)

"Let's delve into specific examples based on the use case scenario you've chosen."



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4. Deep dive on pain points

- Understanding challenges
"Are your main challenges centered around lead generation or conversion?"
- Hidden hurdles
"We often find leaders unhappy about losing deals they could've won. Has this been a concern for your team too?"
- Identifying blockers
"Do you know the key reasons behind deals falling through? It could be misalignment, lack of champion support, or insufficient follow-up."

6. Showcasing value (Solution benefits)

- Case study impact
"By working with us, Company X improved their win rates by an impressive 30%—a game-changer."
- Strategic enhancements
"Flowla not only accelerates deal cycles but also sets you apart in your sales approach."
- Team empowerment
"Our platform standardizes processes and empowers your team to excel."

5. Tailored solutions (Scenario-based)

- Guided consultation
"Our role is to serve as your solution consultants, guiding you toward the most suitable option."
- Introducing Flowla
"Next, let's delve into why Flowla could be a strong contender for your needs."
- Distinguishing factors
"As we evaluate various options, let's show what sets Flowla apart."
- Qualification process
"Our objective is to ensure that Flowla's capabilities align seamlessly with your specific needs."

7. Next steps (Post-demo)

- Concrete actions
"Here's how we move forward after the demo..."
- Workshop opportunity
"We can also organize a workshop to solidify a mutual action plan based on best practices."
- Stakeholder involvement
"Consider inviting additional stakeholders to the next meeting."
- Scheduled follow-up
"Let's set a date for our next meeting in 2-3 weeks."

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Ask for a favor / referral



"As we wrap up, can you introduce us to a company that might benefit from Flowla's capabilities? If they sign up, we're happy to offer you 2 months free."