

Discovery/Needs Analysis Guide

Why should we qualify prospective customers?

The primary reason we qualify is to get to the heart of a client's business needs and determine if there is a real, winnable opportunity for us to pursue.

Qualification helps you establish trust and credibility with a client and uncover the information you'll need to progress the sale, without overtly selling. During qualification you can ask the difficult, even uncomfortable questions, of a prospect and use their responses as a basis for establishing a working relationship with them.

While conducting their Discovery, the most adept salespeople don't just ask great questions, they have the ability to turn the tables and have the prospect sell them on the merits of participating in their review process. This isn't just a clever sales strategy, it's imperative for sales professionals with a finite amount of time, energy and access to resources, to avoid wasting time on organisations not committed to making a change or individuals who have no ability to make a decision in their favour.

Question types

The type of questions you ask, the language you use and the way in which you phrase your questions, can have a huge impact on the insights you collect and a prospective customers willingness to share with you.

Asking the right questions, in the right way and at the right time in a sales cycle can be the difference between winning and losing the business... It can also be the difference between wasting time pursuing an opportunity, which you should have qualified out of!

Remember the better your Qualification and Discovery process, the more information you will have available to you to determine your client's compelling event and drive a successful sales outcome. The insights from your Discovery discussions should teach you precisely how the customer wants to buy and even inform your final negotiation strategy.

Sample discovery questions

Option 1

Q. Do you have a budget for the project?

A simple question, which can easily receive a simple 'yes' or 'no' answer.

Option 2

Q. Tell me about how you derived the budget for this project and whose budget will actually be spent?

Note the subtle difference in these two similar questions. The second question drives a much more detailed discussion and also helps flush out who holds the purse strings for this project. **NB:** If the budget figure they provide doesn't align with your cost expectations, you have an opportunity to highlight this issue now, rather than in 9 months' time.

Option 1

Q. What problem(s) are you trying to solve?

Also a reasonable question to ask, but it won't necessarily drive a strategic discussion.

Option 2

Q. What problem(s) are you trying to solve and have you quantified the problem with a business case or value proposition?

In many cases the prospect may not have a well-defined business case and this gives you the opportunity of asking, "Would it be helpful if I worked with you to help define a business case, to see if it's even worth considering the investment?" **NB:** We should help the client understand that our experience shows that the problems that get solved most frequently in organisations are the ones that have a business case and value proposition.

Option 1

Q. What's your timeframe for this decision?

A simple question which usually receives a simple answer eg 'Our timeframe is 6 months'.

Option 2

Q. What's your timeframe for this decision and can you tell me what happens at the beginning of month 7, if the decision hasn't been made?

Instead of celebrating the fact that the prospect has provided us with a timeframe, we're trying to uncover their source of urgency (or lack thereof). If their answer to this follow up question is "Nothing really happens to the business" then this is evidence that there may not be much validity to their timeframe and provides a useful data point for your qualification process.

Option 1

Q. What solution are you currently using for your ERP requirements?

Another straight forward question, which demands a straight forward answer. "We're currently using XYZ Inc".

Option 2

Q. With your current solution and vendor, how do you address this business need today and why would you even consider changing?

With this question you are saying to the prospect that without a compelling reason for change, you believe it would be unlikely and perhaps even unreasonable for them to make any change to their incumbent solution. **NB:** The statistics are compelling; clients have a high propensity to stay with their existing solutions, because it's usually so costly, painful and disruptive to change.

(With acknowledgement to the book *Unselling* by Peter Bourke)