



Discovery Call Worksheet

Guide the conversation. Capture what matters. Determine the right next step.

PROSPECT INFORMATION

Business name		Contact name	
Contact information		Business type	
Locations		Date	
Lead source			
Reason for the conversation			

CURRENT CUSTOMER COMMUNICATION

How do you currently communicate with customers?

How do customers learn about promotions, events, or updates?

Which marketing efforts are used consistently?

How do you currently encourage customers to return?

CURRENT CHALLENGES

What would you most like to improve in the business right now?

Where are opportunities being missed - slower days, seasons, services, products, or customer follow-up?

Explore Priorities And Impact

Follow important answers. Do not force the conversation through every question.

PRIORITIES AND IMPACT

Which challenge matters most?

How does it affect revenue, retention, growth, or operations?

Why is it important now?

What would a successful outcome look like?

What happens if nothing changes?

What would make addressing it worthwhile?

PREVIOUS ATTEMPTS

What has the business already tried?

What did not work?

What worked?

What was disappointing about the experience or results?

USEFUL FOLLOW-UP PROMPTS

- What makes you say that?
- Why is that important now?
- What do you think is causing it?
- Which concern matters most?
- Can you tell me more?
- What have you already tried?
- What would improvement look like?
- How would solving it affect the business?

Additional notes

Synthesize The Conversation

Complete this section immediately after the call while the conversation is fresh.

DISCOVERY SUMMARY

Top challenge

Why it matters

Desired outcome

Urgency ☐ Low ☐ Moderate ☐ High ☐ Not yet clear

EXACT LANGUAGE

Record the owner's words when describing the challenge, priority, or desired outcome.

POTENTIAL TEXT MARKETING OPPORTUNITIES

- | | | |
|---|---|---|
| ☐ Promote slower days or times | ☐ Increase repeat visits | ☐ Promote offers or updates |
| ☐ Support events or launches | ☐ Fill appointments or consultations | ☐ Re-engage customers |
| ☐ Strengthen retention | ☐ Build a direct communication channel | ☐ Support multiple locations |

FIT ASSESSMENT

Clear communication or engagement opportunity ☐ Yes ☐ Possibly ☐ No

Important enough to address now ☐ Yes ☐ Possibly ☐ No

Text marketing can reasonably support the outcome ☐ Yes ☐ Possibly ☐ No

Owner appears willing and able to proceed ☐ Yes ☐ Possibly ☐ No

Overall fit ☐ Strong ☐ Possible ☐ Not currently ☐ More information needed

DECISION AND NEXT STEP

Decision-makers Timeline

Concern or objection Agreed next step

Person responsible Follow-up date