



**MillionDollarFirms**

# **DISCOVERY CALL SCRIPT**

**“Prescription without diagnosis is malpractice.”**

## **Pre-Call Preparation (5 minutes before call)**

- *Use headphones with mic so your hands are free to take notes.*
- *Eliminate all noise and distractions.*
- *Close all open apps and tabs that aren't relevant to call.*
- *Use breathing exercises to relax and calm yourself.*
- *Release all attachment from the win.*
- *Get excited about the possibility of helping someone.*



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# SET THE AGENDA & GET PROSPECT BUY-IN

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Hey **[NAME]**, It's **[YOUR NAME]** from **[YOUR COMPANY]**. How are you?

Awesome. Well, thank you for taking my call today.

I know you're busy, so I'll get right to the point.

The way these calls work is, I'll ask you questions about your business and what you guys do.

You can ask me any questions you have along the way.

And we'll see if it makes sense for us to work together in any way.

Sound fair enough? (Wait for a "Yes" or "Sure")

- *It's very important to open strong and take control of the conversation. For this script to work, you have to be able to go through the call your way.*
- *If a client has a question that you're not ready to address, say "Sure, we can get to that in just a second, but first I'd like to understand more about \_\_\_\_." And then go back to the script.*





# GET BACKGROUND INFORMATION

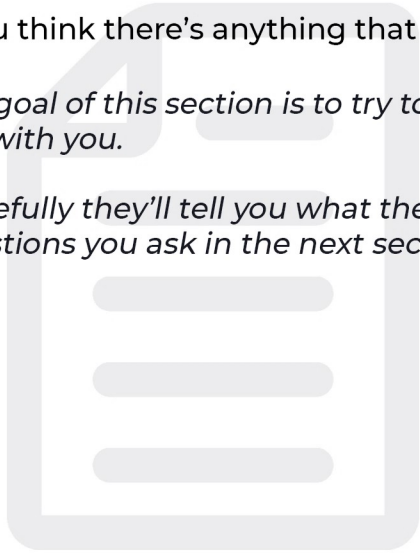
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What motivated you to invest the time in a call with me today?

How would you describe the current state of your business's finances?

Do you think there's anything that can be improved?

- *The goal of this section is to try to understand the prospect's motivation for getting on a call with you.*
- *Hopefully they'll tell you what they're most worried about, and this can guide the questions you ask in the next section.*



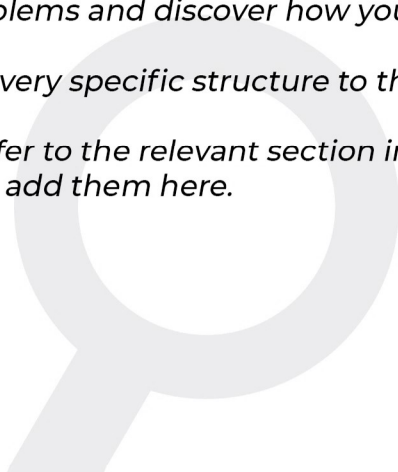
# DISCOVERY (THE SPIN METHODOLOGY)

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*In this section of the call, you're going to ask your prospect questions so you can learn about their problems and discover how you might be able to help them.*

*There's a very specific structure to the way we ask questions. It's a methodology called SPIN.*

*Please refer to the relevant section in Module 3 and develop your SPIN questions. Then come back and add them here.*





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# TELL YOUR STORY

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Okay, **[NAME]**. I'm hearing you, and it sounds like there's definitely an opportunity to **[save you X hours per week, slash your tax bill, make more money, get the IRS off you back, etc]**.

The good news is that I can totally help you.

I'm a **[bookkeeper, accountant, tax professional, CPA, Enrolled Agent, tax attorney, etc]** that specializes in helping **[YOUR NICHE]**.

I typically work with business owners like you and help them \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.



# GAIN COMMITMENT

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This is what I think we should do: two things.

First, I would like you to send me your QuickBooks so I can give it a review to make sure I fully understand your accounting needs.

Also, I'd like to review your tax returns (if applicable).

I'll be happy to send over a Non-Disclosure Agreement if that'll make you feel more comfortable.

Second, we schedule a follow-up call to go over my findings.



I won't charge you a thing for the initial review and follow-up call.

So best case scenario, I find missing money.

Who knows, it could be tens of thousands of dollars, and then we work together to fix it.

Worst case scenario, we don't get to work together, but you get your books reviewed by a professional and have peace of mind that everything is on the right track.

**[SILENCE - WAIT FOR RESPONSE]**

## SCHEDULE FOLLOW-UP

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*Then work out the logistics of getting the financials and tax returns, and schedule a follow-up call right then and there.*

Okay, great! I really think we're going to be able to

So to get your books and tax returns to me, you'll need to \_\_\_\_\_.

Ask the prospect for the best way to follow up with them if you have any questions.

What is your preferred form of communication moving forward here? Is it cell, email, or text?

*Most people will say email. That's great, but you want to make sure you know how to stand out from the 200-300 they get every day. So say something like:*

You probably get 200-300 emails a day like I do. Is there something I can put in the subject line that will help me stand out and get you to open up my email?

Set the expectations for responsiveness.

What should I expect for a response timeline on emails that I send to you? I'll commit that I will respond to you within 24 hours of any email you send me. Is it realistic to ask the same from you?

*You want to establish a communication cadence early in the sales process. Earn your prospect's commitment immediately.*

*If you get them to tell you how they like to be communicated with, they'll respond in a timely fashion. Then, it's much easier to hold them accountable throughout the rest of the process.*

*Finally, end your conversation with a clearly defined next step by reiterating the date and time of the follow-up call.*



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# **BUILD ACTION-BASED TRUST**

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*After the call, you should follow up with the prospect at least once to let them know that you are seriously interested in them and their business.*

*Send a thank you email that summarizes the important points of your conversation and proves to them that you were actively listening to their needs.*

*Mail a handwritten thank you note to show your personal interest. If you have them, include company pens or another gift to establish a sense of reciprocity.*

