

CONSULTATIVE AND RELATIONSHIP SELLING
Discovering

MP
6/26

Written Discovery Agreement Model Format

Dear _____

[Personalize your introductory remarks to your prospective buyer. The last sentence of your remarks should be:]

I would like to clarify our discussion to this point to make sure that I understand your situation.

Current Status:

-
-
-

Desired Status:

-
-
-
-

I hope I have captured the salient points of our discussion. Please make any additions or corrections. [This is your Request for Agreement.]

Recommendation for Next Step:

Based upon the information you have given me, the next step. . . .

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Discovery Agreement Checklist

Objective and Focus

Checklist of Information to Discover

(✓) When Known/Done

Have

1. What are the company's strengths? _____
2. How would their buyers (both internal and external) describe their strengths?
 Their weaknesses? _____
3. How are they currently doing business? _____
4. What are current productivity levels? _____
5. How are productivity levels measured? _____
6. How do they prefer to work with an organization like yours? _____
7. Facts and figures—products/services, sales volume, organizational chart, # of employees, locations, etc. _____
8. Key people—who makes things happen? _____
9. Business philosophy? _____ _____
10. Mission—personal, work unit, division, company? _____
11. Major problem(s) facing company today? _____
12. What might get in the way of attaining the desired objectives _____
13. How do people find out what's expected of them? _____
14. What happens if people actually perform to those expectations?
 Don't perform? _____
15. The business problem to be solved is: _____

Want

1. Objectives? _____
2. What do you think will need to happen in order for the buyer to reach desired goals and objectives? _____
3. If the buyer had a magic wand, what would he or she see as the perfect situation? _____

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Checklist of Information to Discover

(✓) When Known/Done

Want (continued)

- 4. What would be the indications that the buyer's work unit, division, etc., had arrived at the desired objectives? _____
- 5. What will be gained (or saved) if the desired situation is achieved? _____
- 6. Who really cares about (or is responsible for) the difference? _____

The People Involved

- 1. What is the process for making decisions? _____
- 2. Who gets involved? Role of each player? _____
- 3. Where is the money/budget coming from? _____
- 4. What do you expect of me? Written? _____
In person? _____
- 5. Timetable? _____
- 6. Next step? _____
- 7. How have products/services like this been implemented in the past? _____
- 8. What is the role of management? _____
- 9. Who is in charge of the people affected? _____
- 10. Availability/access? _____

Discovery Agreement

- 1. Introductory remarks _____
- 2. Itemized list indicating current status _____
- 3. Itemized list indicating desired status _____
- 4. Request for agreement _____
- 5. Recommendations for next step _____