



AVITUS GROUP

Simplify, Strengthen and Grow Your Business

Business Development Discovery Call Format

Purpose

The purpose of the discovery call is to introduce your client to the department liaison representing whichever service your client is interested in pursuing with Avitus Group. On this call the client and department liaison will review the client's needs and discuss Avitus Group's capabilities to fulfill those needs. The department liaison will collect/request all of the necessary information needed to build a proposal for the service.

Goals

- Take ownership over the meeting
- Explain the purpose of the discovery call
- Introduce the two parties who will be participating in the discovery discussion i.e. your client and department liaison
- Bridge the relationship between these two parties
- Identify next steps to build a proposal
- Set a specific time to deliver the proposal with department liaison and client

Preparation

Things to know about your client:

- Name
- Title
- Years in business
- Distinguishing features of their business in their industry
 - What do they think makes them unique?
 - What do they think they are they doing well?
- Challenges within the industry
 - i.e. why are they seeking our help? What has failed?

Things to know about Department Liaison:

- Name
- Title and role within department
- Years with Avitus Group
- Location
- What they love about their department/Something notable about the department

Delivery

- Whether conducting the discovery call in a conference line or in person with the client make sure you are the first to speak and set the tone for the discussion
- Thank both parties for taking the time to be on the call
- Set the stage
 - Introduce your client by name and title. Give a brief description of their industry and compliment them on some of the things they do very well. Describe how you met and how they came to be interested in learning about our services/what challenges they face in their industry.
 - Introduce department liaison by name, title/role, years of experience and location. Share something notable about this individual in the department to draw client in.
- Hand off
 - Share that you are excited/eager for these two to connect to get this process moving forward and hand the discussion off to department liaison to take it from there.