

Structured Discovery Approach Cheat Sheet

1. Preparation

Objective: Gather comprehensive information about the client.

Actions:

- Research company background via Google, LinkedIn, and annual reports.
- Understand industry trends, competitors, and market position.
- Investigate key personnel's professional history and interests.
- Review relevant internal case studies and references.
- Prepare open-ended questions to uncover needs, challenges, and goals.

2. Opening: Setting the Stage

Objective: Build rapport and set a collaborative tone.

Actions:

- Start with rapport-building questions.
- Show genuine interest in their professional journey and daily challenges.

Example Questions:

- “Tell me, how did you ascend to this position at [Company]?”
- “What drove you to your current role, and how has your journey been so far?”
- “What does a typical day look like for you in your current role?”

3. Decoding Demographics

Objective: Understand the organisational structure and operational dynamics.

Actions:

- Gather information on team sizes, locations, roles, and workflows.

Example Questions:

- “Can you provide a breakdown of your team sizes and locations?”
- “What are the primary workflows your team deals with daily?”
- “How do your teams collaborate across different locations?”
- “Are there any planned expansions or restructuring initiatives we should be aware of?”

4. Mapping the Supply Chain & Business Operations

Objective: Identify dependencies, bottlenecks, and areas for optimization.

Actions:

- Analyze the flow of value within the supply chain.
- Identify key operational challenges.

Example Questions:

- “How does your product journey begin, from the idea to client delivery?”
- “What are the major distribution channels for your products?”
- “What are the most critical components of your supply chain?”
- “Which areas of your operations are currently facing the most pressure?”
- “How do external factors like geopolitical events or economic changes impact your supply chain?”

5. Understanding Workflows & Tech Infrastructure

Objective: Ensure the solution integrates seamlessly with existing tech.

Actions:

- Assess the current software and technology landscape.
- Investigate any plans for future tech upgrades or changes.

Example Questions:

- “Can you walk me through your current software infrastructure?”
- “Are there future plans or software changes on the horizon?”
- “How integrated are your current systems across different departments?”
- “What’s the biggest challenge you face with your current technology setup?”
- “Are you exploring any new technologies or platforms to enhance your operations?”

6. Pinpointing Major Pain Points

Objective: Identify core challenges and opportunities for the solution.

Actions:

- Uncover the main issues hindering the client's success.
- Quantify the impact of these pain points on operations and finances.

Example Questions:

- “In your current processes, what challenges do you face consistently?”
- “If you could redesign certain aspects of your workflow, what would it be?”
- “What are the most significant barriers to achieving your business objectives?”
- “How do these challenges impact your bottom line or overall productivity?”

- “Have you explored any solutions to these problems before? What worked and what didn't?”
- “What would an ideal solution look like for your team?”

7. Expanding the Horizons

Objective: Explore related challenges and broader impacts.

Actions:

- Identify secondary pain points and their effects on other areas.
- Position your solution as a comprehensive fix.

Example Questions:

- “Apart from the primary issues, are there related areas feeling the strain?”
- “How do these challenges impact your larger business objectives?”
- “How do these challenges influence other departments or teams?”

8. Understanding Culture & Integration

Objective: Ensure the solution aligns with the company's culture.

Actions:

- Assess the company's openness to change and past experiences with new solutions.

Example Questions:

- “How does your company typically approach new software adoptions?”
- “What are some cultural values that are non-negotiable during system integrations?”

9. Vision Wrap-up: Clarifying the Way Forward

Objective: Align the solution with the client's vision and establish next steps.

Actions:

- Recap the conversation and validate mutual understanding.
- Define clear steps towards implementation.

Example Questions:

- “Considering the challenges we discussed, what do you foresee if no changes are made?”
- “Shall we outline the next steps to ensure synchronised efforts moving forward?”
- “What are the immediate actions we need to take to move forward with this project?”
- “Are there any potential roadblocks we should prepare for in the upcoming phases?”

- 1. Understand the Background:** Start by understanding the prospect's business, their position in the industry, and their business goals. Use the BANT form and discuss the initial meeting with the prospect.
- 2. Explore the Technical Environment:** Delve into the prospect's current technical infrastructure, including existing solutions, tech stack, and future plans. This will help in understanding how your solution can integrate or replace existing systems. Use a structured Questionnaire or the OSD to understand what is required.
- 3. Identify Key Pain Points:** Identify the major challenges the prospect is facing with their current setup. Understand not just the primary pain points but also related secondary issues that your solution could address. Use a structured Questionnaire or the OSD to understand what is required.
- 4. Quantify the Impact:** Help the prospect quantify the impact of their pain points in terms of cost, productivity, and operational efficiency. This quantification can aid in creating a compelling case for your solution.
- 5. Establish Solution Fit:** Discuss specific capabilities of your solution that match the prospect's needs. This directly ties the discovery conversation to potential outcomes and benefits that resonate with the prospect.
- 6. Vision Reengineering:** Encourage the prospect to envision a future state with your solution in place. Discuss the broader impact on their workflows and potential for reengineering their business processes for better results.
- 7. Evaluate Extended Environment:** Go beyond immediate needs and explore adjacent and impacted areas within the prospect's business that could benefit from your solution. This broader evaluation can uncover additional opportunities for your offering.
- 8. Discuss Implementation and Adoption:** Talk about the implementation process, expected challenges, and how your team would support the transition. Also, discuss the adoption process within their organization to ensure the solution is successfully embraced post-deployment.
- 9. Create a Mutual Action Plan:** Develop a plan that outlines the next steps both parties need to take following the discovery session. This should include timelines, key milestones, and responsibilities to maintain momentum towards a decision.
- 10. Document and Share Discoveries:** Summarize the discovery findings and share them with your prospect to confirm understanding and alignment. This documentation can serve as a basis for all subsequent steps and ensures that

both parties are in agreement on the key issues and proposed solutions.

- 11. Focus on Business Outcomes:** Frame your technical discovery in terms of business outcomes that matter to the prospect. Understand the key performance indicators (KPIs) they care about, and how your solution can impact those metrics positively.
- 12. Use Cases and Scenarios:** Ask the prospect to describe specific use cases or scenarios where their current systems are falling short. This helps in tailoring your solution presentation to address real-world applications that the prospect will find relevant and compelling.
- 13. Stakeholder Mapping:** Identify all key stakeholders involved in the buying process. Understand their roles, influence, and individual pain points. This will help tailor conversations and demonstrations to address the concerns of each stakeholder.
- 14. Competitive Landscape Awareness:** During the OSD and ORC, discuss the competitive landscape. Understand the solutions the prospect is currently considering and how they perceive your solution in comparison. This insight can guide how you position your solution more effectively.
- 15. Security and Compliance:** Address security and compliance issues that are critical to the prospect. Demonstrating an understanding of these aspects and how your solution meets or exceeds industry standards can be a strong differentiator.
- 16. Integration Points:** Explore potential integration points with the prospect's existing systems. Understanding these can help in assessing the feasibility of integration and the scope of work involved, which are often crucial decision-making factors.
- 17. Technical Proof Points:** Provide technical proof points, such as performance metrics, scalability evidence, and reliability stats that can reassure the prospect about the robustness of your solution. Use these points during ORC to substantiate your claims.
- 18. Request a Current System Walkthrough:** Ask for a walkthrough of their current systems and processes. This can provide deeper insights into their operations and help identify unseen opportunities where your solution could add value.
- 19. Timeline and Roadmap Discussions:** Discuss realistic timelines for implementation and any dependencies that might affect these timelines. This should be aligned during the ORC to set appropriate expectations and planning.
- 20. Follow-up Strategy:** Develop a clear follow-up strategy post-ORC. Determine who will be involved in these follow-ups, the topics to be addressed, and the medium of communication. This ensures continuity and keeps the project moving forward smoothly.

- 21. Document Details Thoroughly:** Ensure all technical details, system requirements, and discussions are meticulously documented in the OSD. This allows for a comprehensive review during the ORC and ensures nothing is missed or misunderstood.
- 22. Technical Challenges Identification:** Explicitly ask about any technical challenges or limitations the prospect has experienced. This information should be revisited during the ORC to confirm that your proposed solutions effectively address these challenges.
- 23. Customization Needs:** Determine the level of customization required for the prospect to integrate and use your solution effectively. Customization capabilities can often be a deciding factor, so make sure to discuss this during the ORC.
- 24. Future Scalability:** Discuss not only current needs but also potential future scalability during the OSD. This foresight can be critically assessed during the ORC to ensure the solution can grow with the prospect's business.
- 25. Data Migration Strategies:** Identify the needs and strategies for data migration if applicable. Understanding the scope of data migration early on helps in planning and executing a smoother transition, which should be detailed during the ORC.
- 26. Risk Management:** Address potential risks and their management strategies. Discussing risk management during the OSD and reviewing these plans during the ORC can build confidence and trust in the feasibility and reliability of the solution.
- 27. Demonstrate Thought Leadership:** Use the OSD and ORC to share insights and best practices related to the prospect's industry and technical needs. This positions you as a thought leader and adds value to the relationship.
- 28. Feedback Loops:** Establish a mechanism for ongoing feedback throughout the discovery and implementation phases. This should be agreed upon during the ORC to ensure continuous improvement and satisfaction.
- 29. Technical Training and Support:** Discuss the training and support that will be available post-implementation. Ensuring that the prospect feels supported in the OSD and confirming the details in the ORC can be pivotal in the decision-making process.
- 30. ROI Discussion:** Clearly articulate the expected return on investment (ROI) during both the OSD and ORC. Providing concrete figures and timelines can help justify the investment to stakeholders and speed up the decision-making process.