

# Sales Discovery Cheat Sheet

## BANT vs CHAMP vs MEDDIC

**BANT:** Good for quick and basic qualification, focusing on whether the prospect has the budget, authority, need, and timeline for the solution.

**CHAMP:** This approach is more customer-centric. It focuses on understanding the prospect's challenges and prioritising their needs and urgency.

**MEDDIC:** Offers a comprehensive and detailed framework, ideal for complex sales, by covering financial metrics, decision criteria, and the entire decision-making process.

Aspect	BANT	CHAMP	MEDDIC
Full Form	Budget, Authority, Need, Timeline	Challenges, Authority, Money, Prioritization	Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, Champion
Focus	Basic qualification	Customer-centric, focus on challenges and priorities	Comprehensive understanding of buying process and criteria
Budget/Cost	Budget	Money	Metrics (ROI and financial impact)
Decision Makers	Authority	Authority	Economic Buyer, Champion
Needs/Challenges	Need	Challenges	Identify Pain
Timeline/Urgency	Timeline	Prioritization	Decision Process, Identify Pain
Criteria	–	–	Decision Criteria
Process	–	–	Decision Process
Internal Advocate	–	–	Champion
Key Strength	Simplicity, easy to apply	Focus on understanding and solving customer problems	Detailed and thorough, covers all aspects of the buying process
Use Case	Quick initial qualification	Medium to complex sales cycles	Complex sales environments

## 1. BANT Framework

### Budget:

"What is your allocated budget for this project?"

"Is there flexibility in your budget if the solution exceeds initial expectations?"

"How do you typically fund similar projects?"

"Have you previously allocated a budget for solving this problem?"

"What are the budget approval processes within your organisation?"

### Authority:

"Who will be the final decision-maker for this purchase?"

"Are there other stakeholders involved in the decision-making process?"

"Who else should be involved in this discussion to ensure all perspectives are covered?"

"How does your organisation make purchasing decisions?"

"Can you walk me through the decision-making hierarchy?"

### Need:

"What specific challenges are you currently facing?"

"How critical is it to address this problem in the short term?"

"What are the key pain points driving this initiative?"

"How have these issues affected your business performance so far?"

"What would happen if these needs are not met in the next few months?"

### Timeline:

"When do you need to see results or have the solution implemented?"

"Are there any upcoming events that would accelerate your decision?"

"What are your target dates for implementation?"

"How do external factors like market trends or internal deadlines influence your timeline?"

"Are there any risks associated with delaying this decision?"

## 2. CHAMP Framework

### Challenges:

"What are the biggest obstacles your team is facing right now?"

"How are these challenges impacting your business performance?"

"Have you tried other solutions in the past? If so, what worked and what didn't?"

"How do these challenges affect your long-term goals?"

"What internal or external factors contribute to these challenges?"

### Authority:

"Who else needs to be involved in discussions to move forward?"

"What does the decision-making process look like on your end?"

"Who will be responsible for championing this project internally?"

"Can you describe the influence of each stakeholder involved?"

"What criteria will the decision-makers use to evaluate solutions?"

### Money:

"What financial resources have been allocated for this initiative?"

"How do you justify the ROI internally for such investments?"

"What financial constraints could impact this decision?"

"Are there specific financial targets or savings you need to achieve?"

"How do you prioritise spending across different departments or projects?"

### Prioritisation:

"Where does solving this issue fall on your list of priorities?"

"What are the consequences if this problem remains unaddressed?"

"What other initiatives are competing for your attention and resources?"

"How does this project align with your strategic goals?"

"What would make this project move up or down on your priority list?"

## 3. MEDDIC Framework

### Metrics:

"What KPIs are you aiming to improve with this solution?"

"Can you quantify the expected benefits in terms of cost savings or revenue growth?"

"What metrics are currently underperforming that this solution could help improve?"

"How do you measure the success of similar projects?"

"What are your target metrics for the next quarter or year?"

### Economic Buyer:

"Who has the final say over budget approval?"

"What are the economic buyer's main concerns or goals?"

"How does the economic buyer view the ROI of this project?"

"What financial metrics are most important to the economic buyer?"

"Can we schedule a meeting with the economic buyer to understand their expectations?"

### Decision Criteria:

"What are the key factors you consider when choosing a solution?"

"How important are vendor reputation and solution scalability in your decision?"

"What specific features or capabilities are must-haves for you?"

"Are there any non-negotiables that could disqualify a vendor?"

"How do you evaluate the long-term value of a solution?"

### Decision Process:

"What steps do you follow to make a purchase decision?"

"How long does it typically take to finalize a decision once all information is gathered?"

"Who will be involved at each stage of the decision-making process?"

"Are there any potential roadblocks in your decision-making process?"

"What can we do to facilitate and speed up your decision-making process?"

### Identify Pain:

"What specific pain points are driving the need for a new solution?"

"How much is this problem costing you currently in terms of time or resources?"

"What are the downstream effects of these pain points on other areas of your business?"

"How do these pain points compare to other challenges you're facing?"

"What solutions have you considered or tried in the past to address these issues?"

### Champion:

"Is there someone within your organisation who is advocating for this solution?"

"How can I support your internal champion in making the case for our solution?"

"What concerns might your champion need to address with other stakeholders?"

"How influential is your champion in the decision-making process?"

"What can we provide to empower your champion in their advocacy?"

### Importance of Documentation: The OSD & CRM

**Document Key Insights:** Use the Opportunity Scoping Document (OSD) to capture the essential details from your discovery phase. Ensure all insights are documented in your CRM for easy retrieval and team collaboration.

**Leverage Tools:** Modern tools like Gong.io can analyse conversations and provide deeper insights, helping to refine your discovery process and make data-driven decisions.

**When Should PreSales Step into Sales Discovery?**

**Early Engagement:** PreSales can be involved early in the discovery phase, particularly if the sales team requires technical insights to set the right expectations.

**Technical Expertise:** Engage PreSales when detailed technical discussions are needed to clarify the client's requirements or to navigate complex technical landscapes.



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- 1. Start with Personal Connection:** Begin your discovery conversation with personal questions that relate to the individual's role and their journey to their current position. This helps to establish rapport and gather insights into their perspectives and influence within their organization.
- 2. Understand the Company and Team:** Ask about the company's structure, the team's size, roles, and experience levels. Understanding the company's demographics can reveal how decisions are made and who the key stakeholders might be.
- 3. Explore Workflows and Processes:** Dive into the existing workflows and processes to understand how they are managed and identify inefficiencies or pain points that your solution might address. Keep the initial conversation high-level, focusing on gathering basic workflow "vitals" before diving deeper.
- 4. Assess the Technical Environment:** Inquire about the prospect's current technology infrastructure and future plans. This helps in aligning your solution's technical capabilities with their technology roadmap and existing systems.
- 5. Identify Major Pains and Related Pains:** Inquire Encourage the prospect to describe their current major challenges and processes. Use tools like diagrams or whiteboards to visualize these processes, which can help uncover not only the primary pains but also related secondary issues.
- 6. Quantify Impact and Vision Reengineering:** Discuss the measurable impacts of the existing challenges and explore the prospect's vision for a solution. This often includes understanding the financial and operational gains from addressing their pain points.
- 7. Explore the Extended Environment:** Go beyond immediate needs to understand the broader business environment, including adjacent and impacted areas. This can open up discussions about additional value your solution could provide.
- 8. Discuss Cultural and Organizational Uniqueness:** Recognize what makes the prospect's company unique and how these unique traits might influence the adoption and success of your solution.
- 9. Evaluate the Consequences of Inaction:** Discuss what happens if no solution is implemented. This helps in assessing the urgency and importance of solving the identified problems, guiding the prospect to recognize the need for a timely decision.

- 10. Create a Mutual Action Plan:** Conclude the discovery phase with a clear plan that outlines next steps, such as scheduling a detailed demonstration or further stakeholder discussions. This plan should reflect everything learned during discovery and align with the prospect's purchasing process.
- 11. Confirm Budget Early:** Clarify budget constraints early in the discussion to tailor the conversation around solutions that fit within the prospect's financial parameters. Understanding the budget helps in focusing on feasible solutions. (BANT)
- 12. Identify Decision Makers:** Identify all key stakeholders and decision-makers early in the process. This helps ensure that all necessary parties are involved from the beginning and can speed up the decision-making process.
- 13. Assess Purchase Readiness:** Determine how soon the prospect needs to implement a solution and what events might trigger the purchase. This helps in timing your proposal appropriately.
- 14. Explore Previous Solutions:** Inquire about past solutions the prospect has used for similar problems. This can reveal what has worked or hasn't and how your solution could offer improvements.
- 15. Understand Compliance and Regulations:** Discuss any compliance issues or regulatory requirements affecting the prospect. This ensures your solution meets all necessary criteria and avoids potential roadblocks.
- 16. Ask Open-ended Questions:** Utilize open-ended questions to encourage detailed responses. This can provide deeper insights into the prospect's challenges and needs.
- 17. Leverage Social Proof:** Mention how similar companies have successfully implemented your solutions. Case studies or testimonials can be persuasive in demonstrating the effectiveness of your solution.
- 18. Check Competitor Influence:** Find out if the prospect is considering competitors' solutions. Understanding their evaluation criteria and preferences can help tailor your pitch to highlight unique advantages.
- 19. Seek Referrals within the Organization:** Ask for referrals to other departments within the prospect's organization that might benefit from your solution. This can expand your footprint and create multi-threaded relationships.
- 20. Summarize and Confirm Understanding:** At the end of your discovery call, summarize key points and confirm your understanding with the prospect. This helps ensure alignment and addresses any misunderstandings early on.
- 21. Prioritize Flexibility in Solutions:** Highlight the

- adaptability of your solutions during discussions. Emphasize how they can be tailored to meet specific needs or scaled as the prospect's business grows.
- 22. Emphasize the Impact of Delay:** Discuss the potential costs and lost opportunities that could result from delaying the implementation of a solution. This can help create a sense of urgency and prioritize your solution in the prospect's considerations.
- 23. Detail the Implementation Process:** Provide a clear and concise roadmap of the implementation process. This includes timelines, key milestones, and what is required from the prospect's team, helping them visualize the path forward.
- 24. Focus on Return on Investment (ROI):** Prepare to discuss and demonstrate the ROI of your solution. Use data and analytics to make a compelling case for the financial benefits of your product or service.
- 25. Use Visual Aids:** Employ diagrams, flowcharts, or slides to visually explain how your solutions work or how they integrate with existing systems. Visuals can aid comprehension and retention of complex information.
- 26. Handle Objections Gracefully:** Be prepared to address and overcome objections. Understand common concerns related to your product and have responses ready that reassure and educate the prospect.
- 27. Monitor Prospect Engagement:** Pay attention to the prospect's engagement level during discussions. Are they asking questions, and do they seem genuinely interested? Adjust your approach based on their cues to keep them engaged.
- 28. Facilitate Internal Consensus:** Offer to provide materials or meetings that can help the prospect communicate the value of your solution internally. Facilitating their internal selling process can be crucial in complex B2B environments.
- 29. Clarify Next Steps Clearly:** Always end each interaction with a clear agreement on next steps. This could be a follow-up meeting, a call to discuss details with other team members, or a deadline for a proposal submission.
- 30. Leverage Technology:** Utilize CRM tools to track and manage discovery insights and follow-ups effectively. Tools like these can help personalize the customer experience and ensure no details are missed during the sales process.