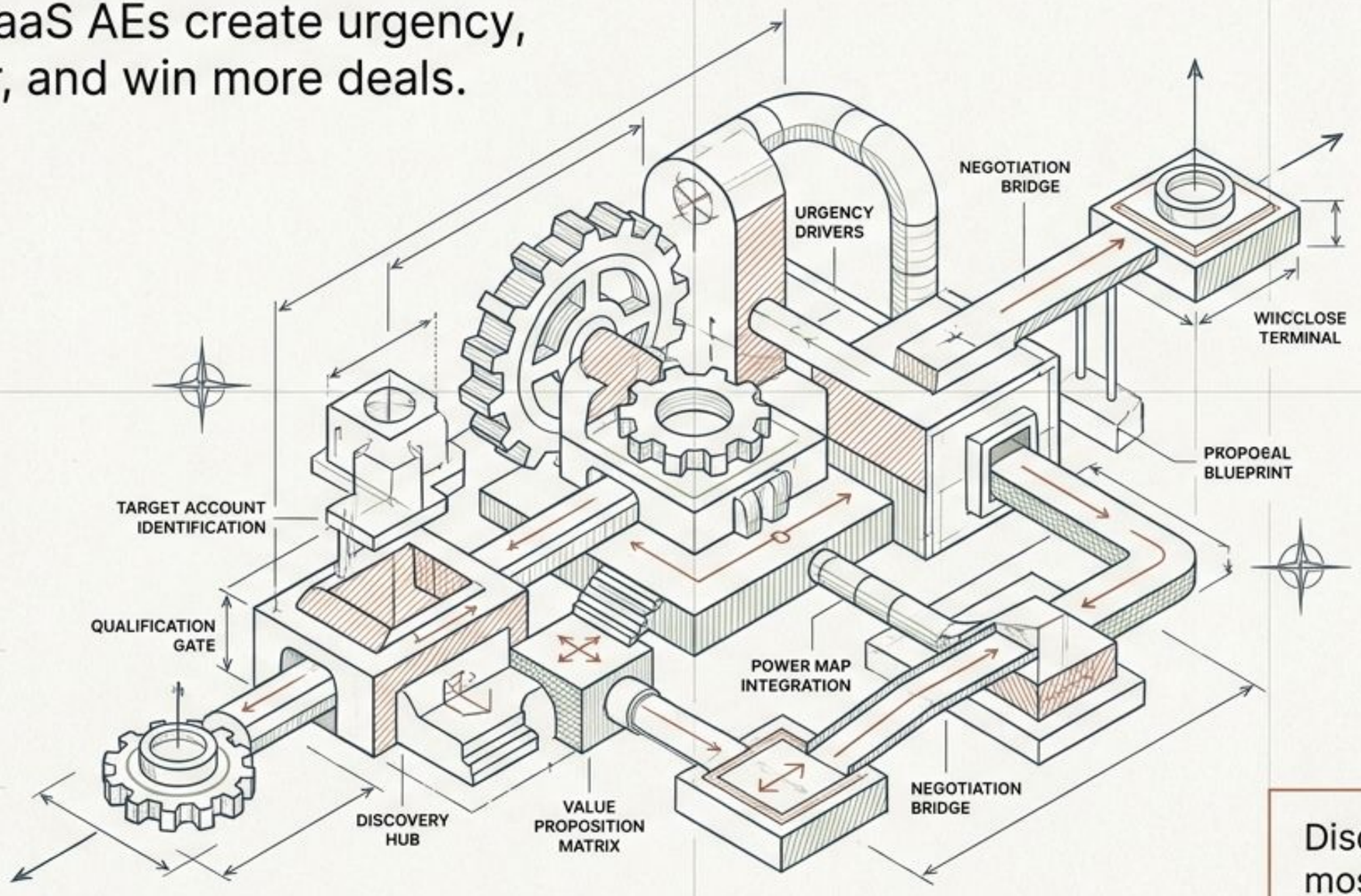
SaaS Discovery Masterclass

How great SaaS AEs create urgency, sell to power, and win more deals.



Discovery is THE #1 most important training.

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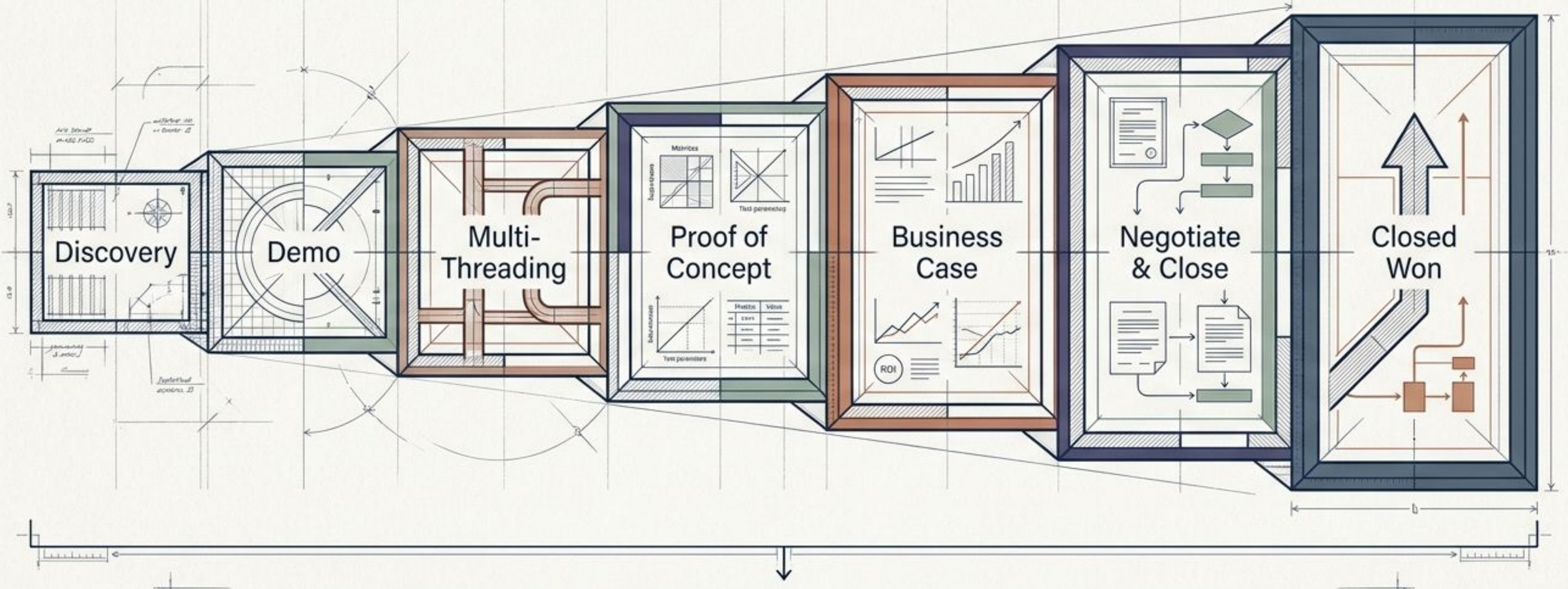
It Starts Here and Compounds



Discovery influences EVERYTHING in the sales process going forward. It is not just a stage; it is the foundation that dictates the success of everything that follows.

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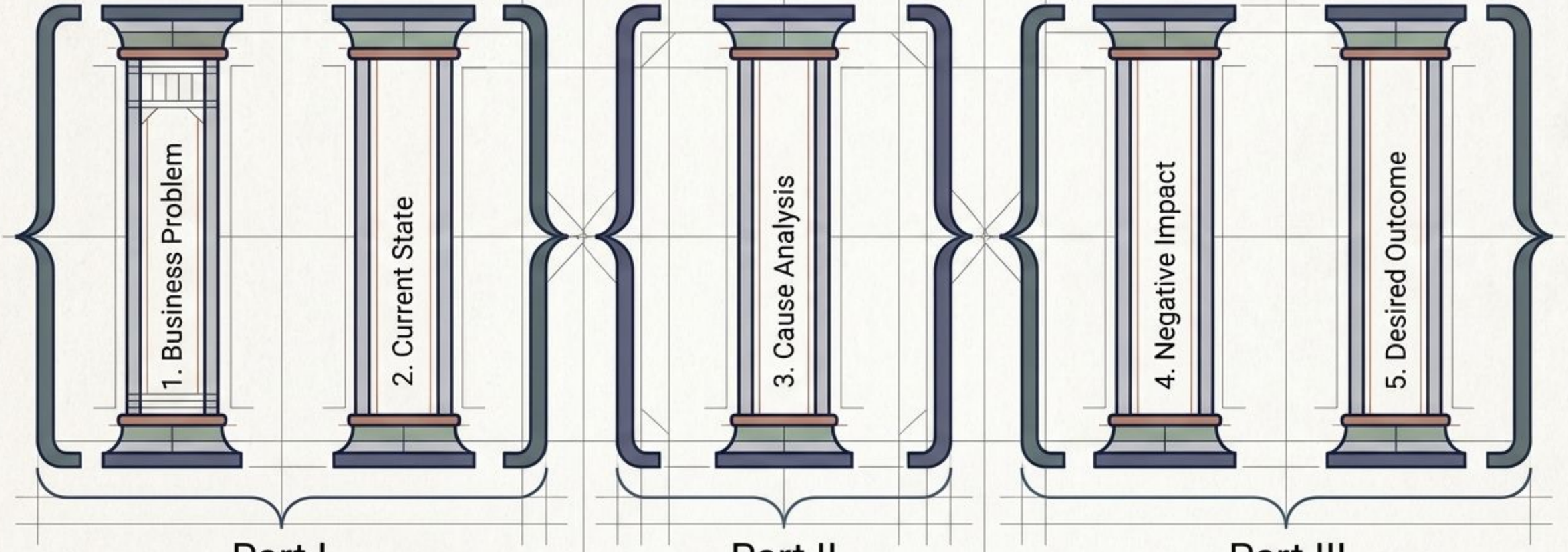
The Architecture of Effective Discovery



Part I

Identify the problem and mutually understand the current state.

Part II

Mutually identify and challenge the true root cause.

Part III

Explore ramifications and understand the desired future.

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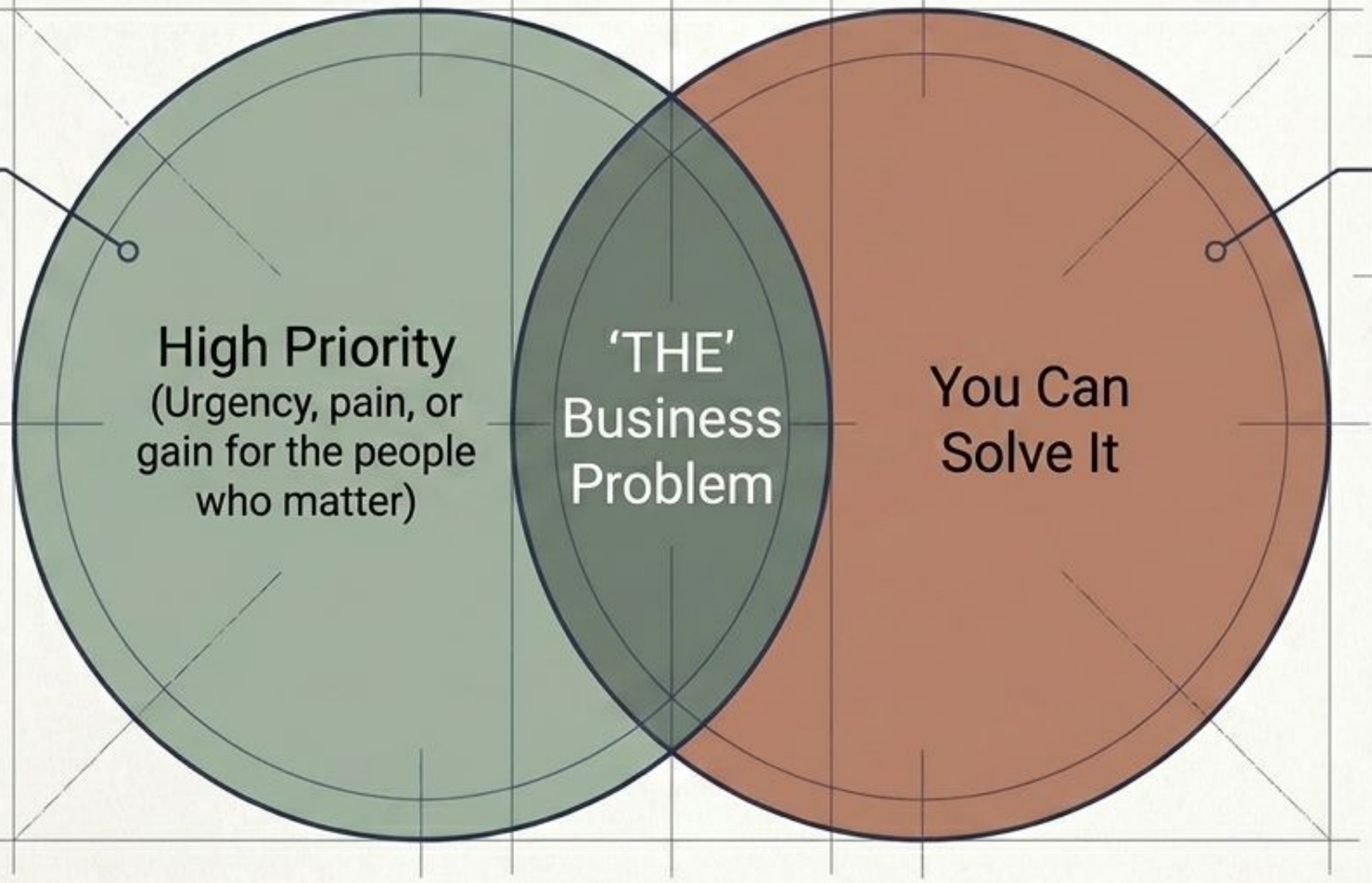
Identify and Validate ‘THE’ Business Problem

Just because they have a problem you can solve is not enough.



If they have a high priority problem, it doesn’t matter much for your deal if you cannot solve it.

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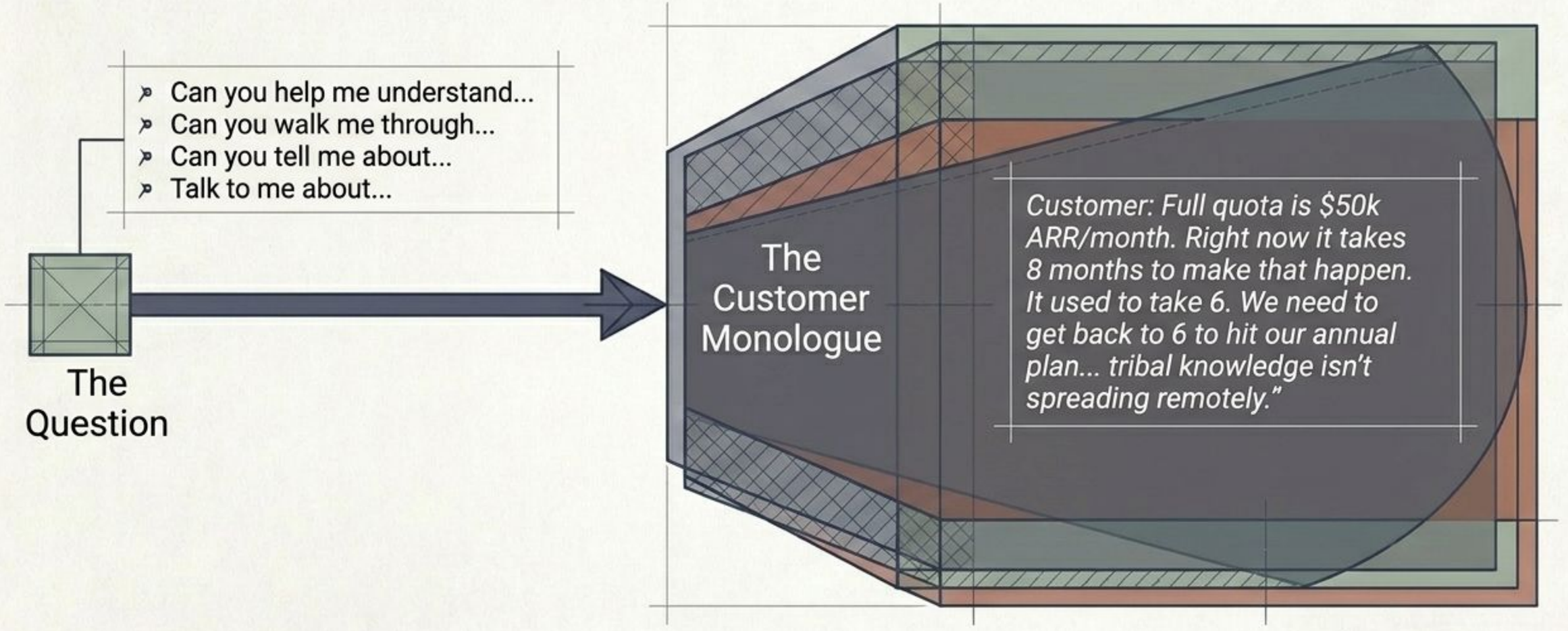
Demand Specificity. Do Not Stop at Vague Answers.

The goal of assessing the current state is to ask questions that get long responses.



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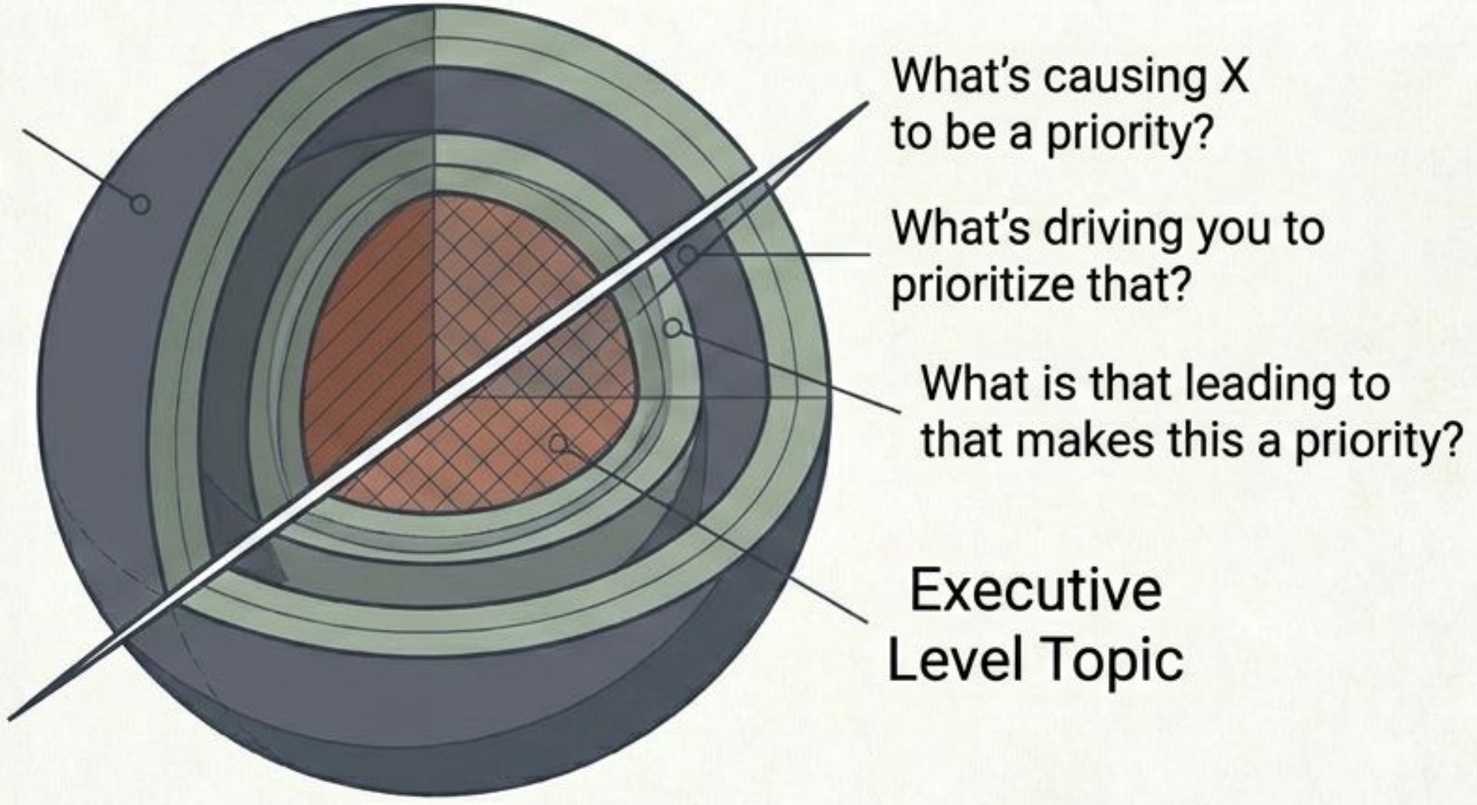
Finding the Core Requires the Right ‘Knife’



Before we go too much further here, I want to make sure we’re anchoring the conversation to the right thing... is this THE challenge you care about solving? Or are we barking up the wrong tree?

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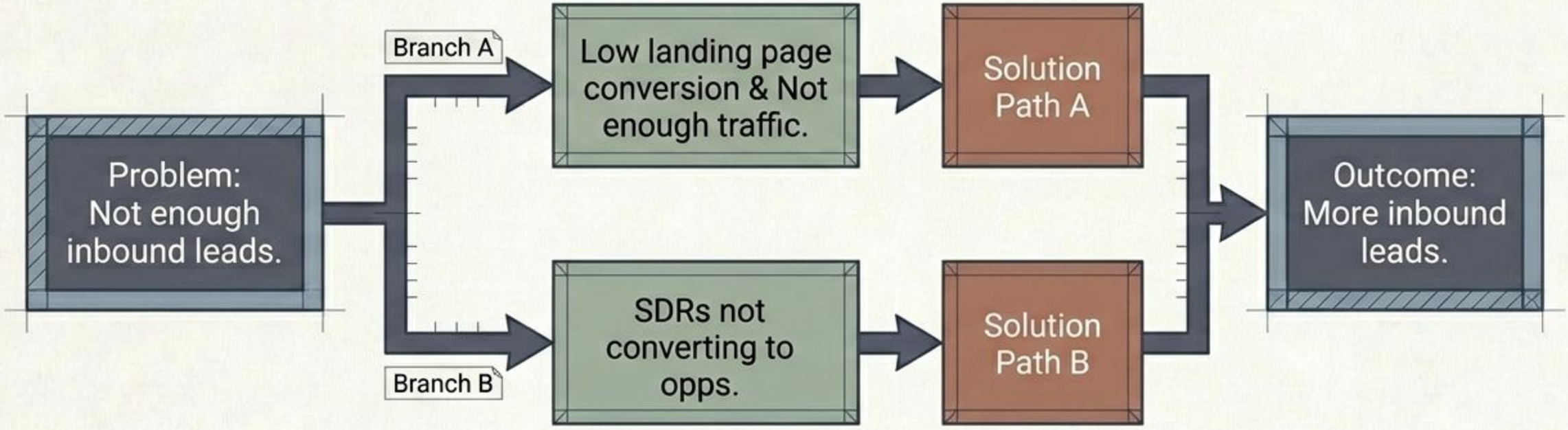
The Cause Dictates the Solution



Exploring the root cause using funnel questions positions you to be a trusted advisor, precisely aligning your specific solution to their specific operational failure.

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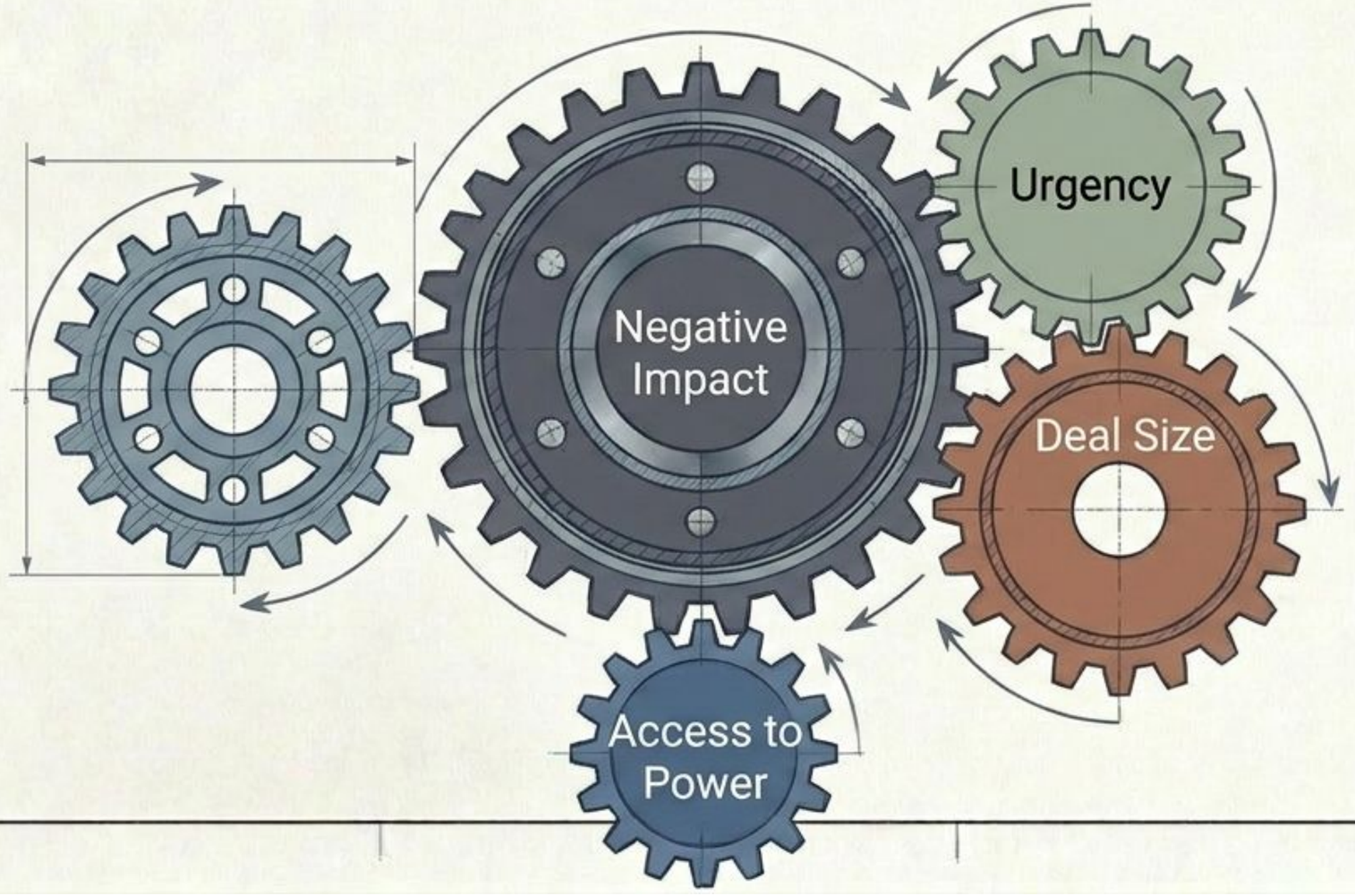
Doubling Your Influence

Great impact discovery builds the seriousness and urgency required to justify action, get key people involved, and ultimately spend money.



Discovery Prerequisites

1. Pre-call planning (Pre-plan 2-3 impact questions).
2. Business acumen (Exploring the ins and outs of complex problems).
3. Domain knowledge (Knowing buyer personas and consequences).

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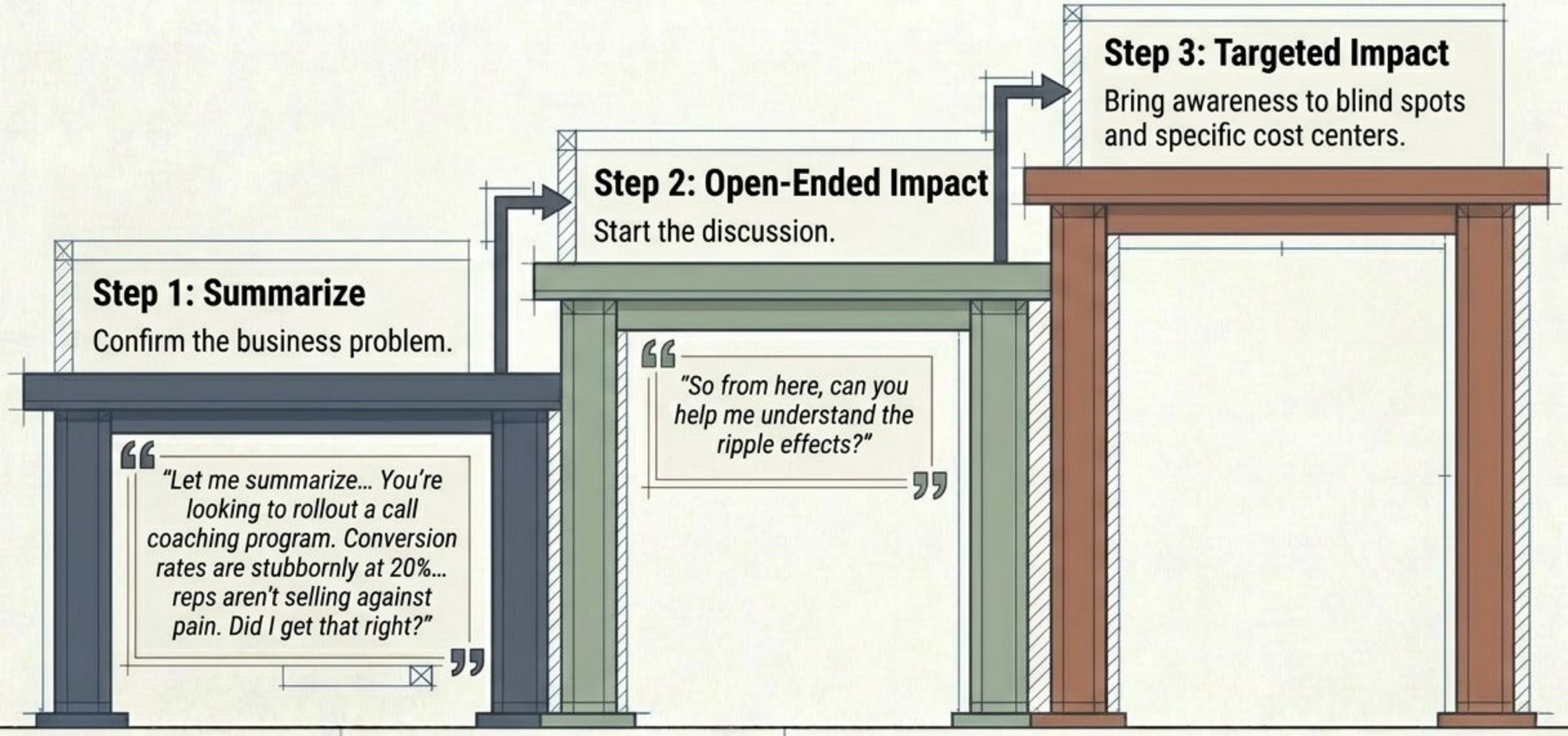
The 3-Step Impact Sequence Algorithm



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Navigating Open vs. Targeted Impact

Open Questions	Targeted Questions
Function Allows buyer to go whatever direction they choose. Gives you “permission” to ask targeted questions.	Function Narrows the buyer’s focus to something specific tied directly to your solution’s value.
Example 1 How is this conversion rate problem impacting the rest of the business?	Example 1 How is it impacting your cost of acquisition?
Example 2 Earlier you shared this challenge. Can you help me understand how this would derail you?	Example 2 Is your CFO concerned w/this metric due to its impact on cost of acquisition and lifetime value?

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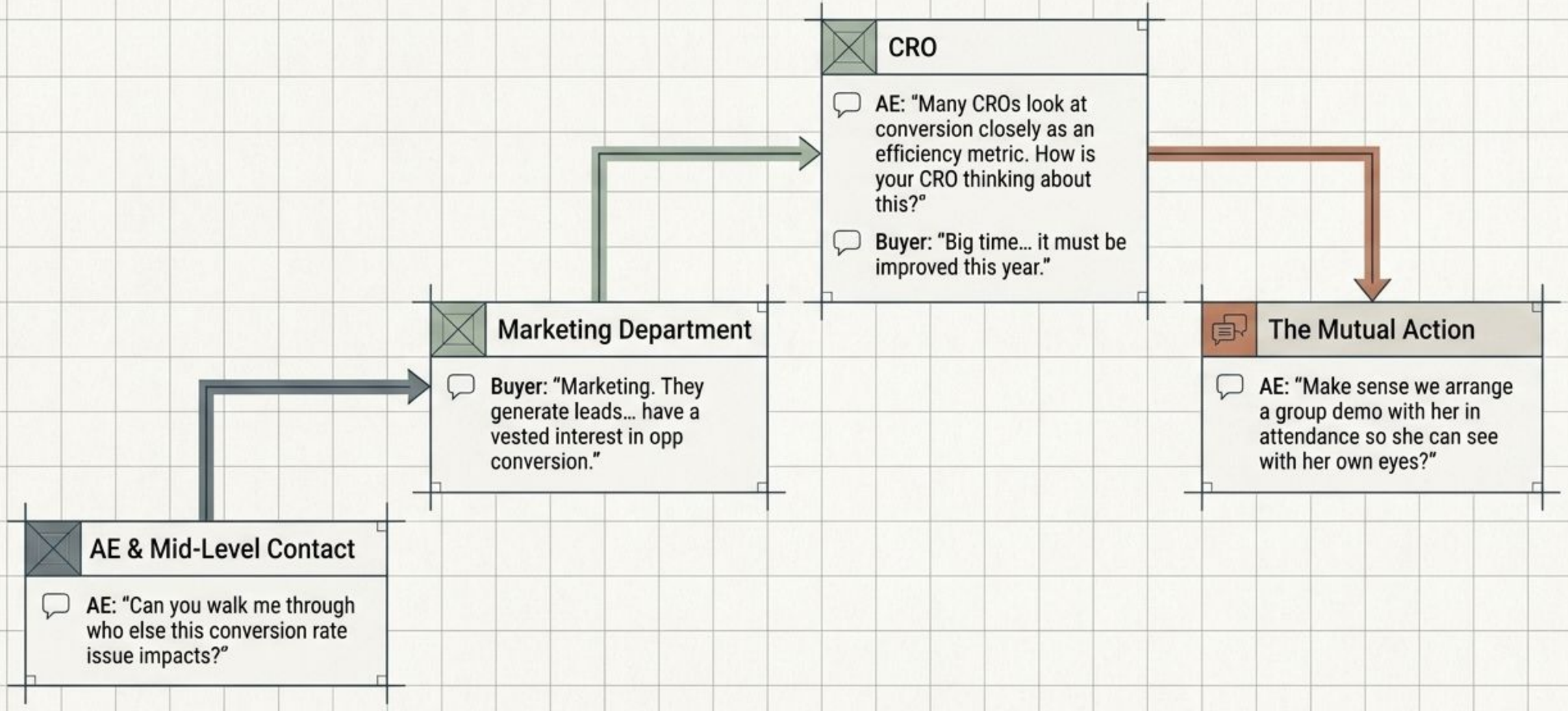
Using Impact to Gain Access to Power



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Discovering the Future

Everything so far has been about the past and present.
Now, it's time to build a vision of a desired outcome.

1. Build a Vision

Focus on what they want to achieve.

2. Evoke Raw Emotion

Tap into the 'why' at a personal level. What does the individual gain?

3. Get Them to Own It

Get them to voice what they need before you tell them. When they own it, selling becomes a non-event.

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The Desired Outcome Sequence

What do you think you'd need to solve this challenge?

What business outcome do you think you'd realistically achieve?

Mind if I ask an awkward question? Why is that important to you?

Summarize and confirm.

When they voice the benefits before you pitch them, they own it.

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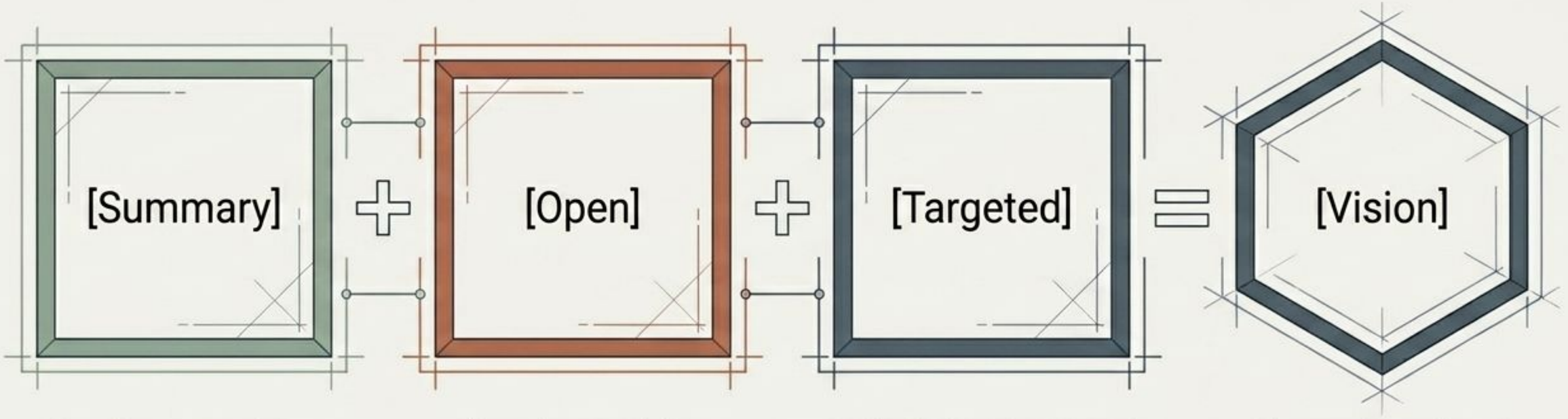
Synthesizing the Framework for the Future



Start by summarizing the negative impact uncovered earlier.

Allow them to define the fix. (“What do you think you need to solve this challenge?”)

Guide their vision toward specific differentiators. (“Have you thought about X?”, “How much would Y help?”, “What are your thoughts on Z?”)

The resulting shared understanding and commitment to a future state.

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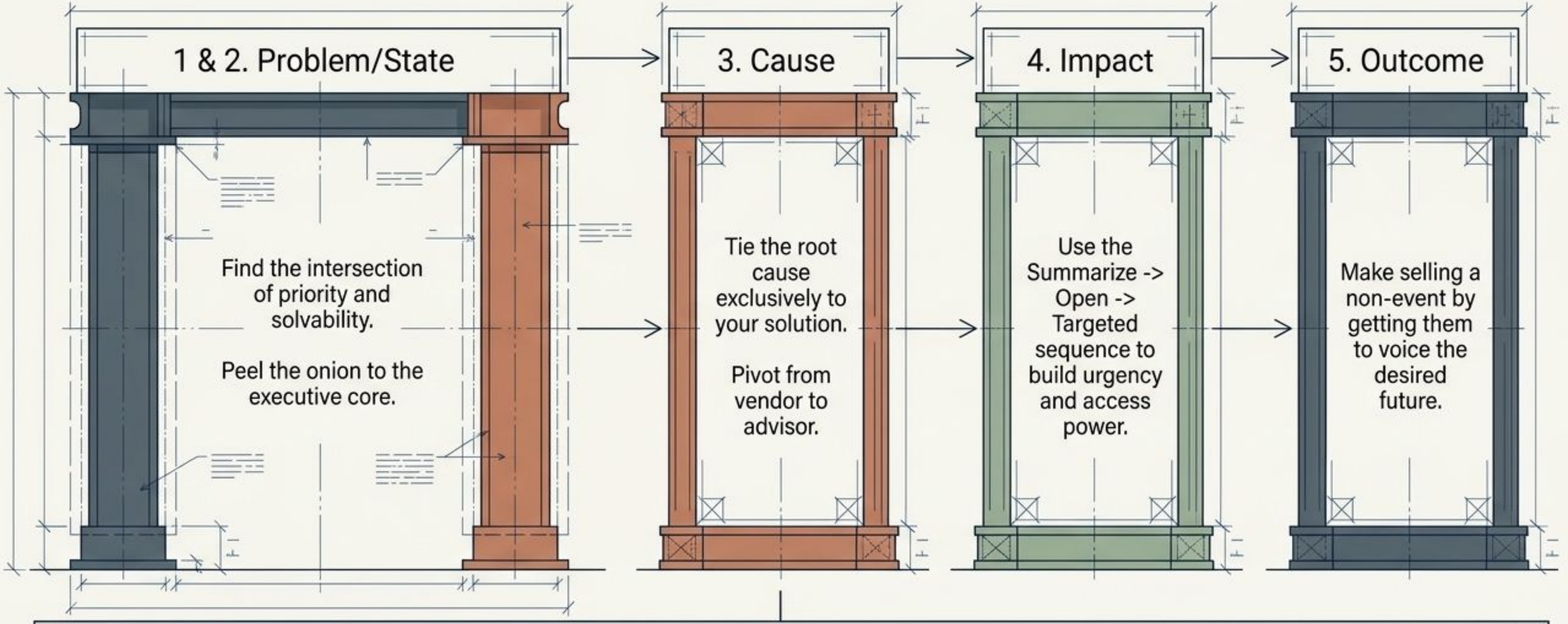
The Complete Architecture of Discovery



You now have a strong basis for your entire discovery conversation. It starts here.

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