

DISCOVERY CALL MASTERY:

Essential Questions for Success

The primary objective of a discovery call is to gather information, understand the member's needs and challenges, and determine how you can best serve them. Qualifying questions unveil the member's desires, needs and alignment with your credit union's offerings. Meanwhile, disqualifying questions ensure your time and effort are invested where the likelihood of success is the highest.

Disqualification questions are not a verdict, but rather a compass, guiding you to the heart of challenges and potential roadblocks. Each discernment is a chance to pivot, adjust and craft a more tailored solution for your member.

Below are examples of both qualifying and disqualifying questions that are intentionally broad and should be finely tailored to the unique circumstances and nuances of each prospect. Remember, it's not merely about asking the right questions; it's about asking the right questions in the right way, at the right time, for each individual member.

Qualification Questions: DIGGING DEEPER

What led you to explore our product/service?

Understanding their initial curiosity provides valuable insights into their needs and expectations.

Can you share specific financial challenges you are currently facing and wish to overcome?

Identifying the pain points allows you to tailor your pitch – positioning your solution to their specific problem.

How do you currently manage your finances?

This helps you understand what methods, preferences and any existing tools or solutions they may already be using.

Disqualification Questions: ENSURING THE PERFECT FIT

Have you faced challenges with financial solutions in the past, and what lessons have you learned?

The goal is to understand potential pitfalls, gauge the prospect's expectations and address concerns from the outset.

Who else is involved in your financial decisions, and what factors influence your choices?

Are you even talking to the decision maker, or is that someone else in the family? Understanding their decision-making process is crucial for navigating complex sales.

Do you have any other financial commitments or obligations?

This information helps you understand potential constraints and competing priorities so that the solution you propose aligns with the prospect's current financial situation.

Breakout Work:

Name a time in your career when you didn't ask the right questions and it cost you the sale/opportunity. What would you have done differently?

What's your biggest struggle with discovery calls?

your marketing. 
strategy • creative • branding

Winning starts with understanding;
the more you know, the stronger you
become.