STANDARD OPERATING PROCEDURE

Sales Discovery Call SOP

Document no.	SOP-SLS-002
Revision	1.0
Owner	Sales Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To run discovery calls that uncover a prospect's real needs and decision process, so the account executive can decide whether and how to move the deal forward.

2. Scope

Applies to the first substantive call between an account executive and a qualified prospect. Initial lead qualification and later proposal or negotiation calls are covered by separate SOPs.

Definitions

Discovery call	The first in-depth sales conversation focused on understanding the prospect's problem, goals, and buying process rather than pitching the product.
Champion	A contact inside the prospect's organization who supports the deal internally and helps navigate the buying process.

3. Responsibilities

Account Executive	Prepares for and leads the discovery call, asks probing questions, and documents findings in the CRM.
Sales Engineer	Joins technical discovery calls to answer product and integration questions the AE can't cover alone.
Sales Manager	Reviews call recordings and notes to coach on discovery quality and deal strategy.

RACI matrix

Activity	Account Executive	Sales Engineer	Sales Manager
Research the prospect before the call	R/A	-	I
Set the agenda and lead the call	R/A	C	I
Answer technical questions on the call	C	R/A	-
Document findings in the CRM	R/A	C	I
Review call quality and coach	C	I	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- CRM opportunity record
- Discovery call guide or question bank
- Prospect's public materials for research
- Call recording or notetaking tool

5. Procedure

Step	Task	Owner	Done
5.1	**Research the prospect beforehand** Review the prospect's website, recent news, and the CRM record for prior interactions before the call, and note anything specific to reference.	Account Executive	☐
5.2	**Confirm attendees and agenda** Confirm who will be on the call and send a brief agenda in advance so the prospect knows what to expect and can bring the right stakeholders.	Account Executive	☐
5.3	**Open with rapport and agenda review** Open the call by briefly building rapport, confirming the time available, and restating the agenda so both sides agree on how the call will go.	Account Executive	☐
5.4	**Ask about current state and goals** Ask the prospect to describe how they handle the problem today and what they're trying to achieve, listening for specifics rather than general statements.	Account Executive	☐
5.5	**Dig into pain points and impact** Follow up on any pain point mentioned by asking what it costs them in time, money, or risk, so the impact is concrete rather than vague.	Account Executive	☐
5.6	**Understand the buying process** Ask who else is involved in the decision, what the evaluation and approval steps look like, and what timeline they're working toward.	Account Executive	☐
5.7	**Bring in a sales engineer for technical questions** When the conversation moves into integration, security, or technical requirements beyond the AE's depth, loop in a sales engineer on this call or a scheduled follow-up.	Sales Engineer	☐
5.8	**Identify a potential champion** Notice who on the call seems most invested in solving the problem and ask questions that help confirm whether they could become an internal champion.	Account Executive	☐
5.9	**Summarize what was heard** Summarize the prospect's stated goals, pain points, and process back to them before moving to next steps, and correct anything they clarify. **Checkpoint:** The prospect confirms the AE's summary of their needs and process is accurate before the call ends.	Account Executive	☐
5.10	**Propose clear next steps** Propose a specific next step, such as a demo or technical deep dive, with a date and the attendees needed, rather than leaving it open-ended.	Account Executive	☐

Step	Task	Owner	Done
5.11	**Log the call in the CRM** Log the discovery findings, the identified pain points, buying process, and agreed next step in the CRM opportunity record right after the call. **Checkpoint:** CRM notes are updated with discovery findings and next steps within the same business day as the call.	Account Executive	☐
5.12	**Send a written recap** Send the prospect a brief written recap of what was discussed and the agreed next step, so there's a shared record and reason to stay engaged.	Account Executive	☐

6. Quality checks

- Every discovery call has documented pain points and a buying process summary in the CRM.
- Next steps are specific, dated, and logged for every call.
- Technical questions beyond the AE's depth are routed to a sales engineer.
- A written recap is sent to the prospect after each discovery call.

7. Records

- CRM discovery notes and opportunity fields
- Call recordings where consented
- Written call recap sent to the prospect

8. KPIs

- Discovery-to-next-step conversion rate
- Percentage of calls with complete CRM documentation
- Average deal cycle length from discovery to close

9. Common mistakes

- Pitching the product before fully understanding the prospect's need.
- Leaving the call without a specific, dated next step.
- Skipping CRM documentation until days after the call.
- Not identifying who else is involved in the buying decision.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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