Learn about your Customer with the right Discovery Call Questions

This is a fillable pdf – You can add your notes in the gray blocks below, and save it.



DAVID SAYS...

"90% of a successful pitch is about preparation – and 90% of that preparation is about focusing on your customer! As an agency, you can avoid pitching blind by asking the right questions in a discovery call. Here is a list of useful questions that will get the conversation going, and help you understand better what challenges they face, and how you can help them address those challenges – and win the pitch!."

"Can you tell me about the biggest marketing/business challenges you're currently facing?"

"Which competitors do you keep an eye on & how would you rate their strengths/weaknesses compared to yours?"

"What marketing/sales channels have you used so far? What's worked well, and what hasn't?"

"What metrics or KPIs would you use to define success (e.g., website traffic, leads generated, sales)?"

"Beyond immediate marketing needs, what are your business goals for the next 1–3 years?"

"What's your ideal timeline for achieving these goals?"

"Do you have an internal marketing team, or will you rely solely on our agency for execution?"

Ask for **DATA** wherever possible!

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