



The Exploratory Question Guide

Introduction

The exploratory process, besides being an opportunity to share with your prospects, is an opportunity to learn from your prospects. Ultimately by learning about your prospect, you can determine if they need your help, are interested in your help, and if in fact you can help. Use the guide below for some ideas on questions you can use in different parts of the exploratory process. You won't use all or even most of these questions on a single call so select the ones for each call that you expect to help you learn the most.

Company / Organization

Company

- Who are your customers?
- Who are your competitors?
- What is your secret sauce?
- How do you fit into your industry?
- What is your average sale price?
- What is your company mission?
- What are your company revenue targets?

Organization

- What are your department's goals?
- What is your role?
- How do you fit into the company?
- What are some things you've been working on recently?
- What are the other roles in your department?
- What role does your organization play in your company?

CGP, TCI, and BA

CGP

Challenges

- You've given me a great view into what you are looking to accomplish and what you plan to do to get there. I'm wondering what things you think will get in your way?
- What obstacles do you think will keep your plan from working?
- What's going to get in the way of hitting _____ (state their goal)?
- What programs do you already have in place to achieve what we've talked about?
- How is that going?
- So it sounds like that's really hard to do. What are you going to do to ensure that works?
- What do you think is your biggest marketing/sales/service challenge?
- Why do you think you'll be able to eliminate these challenges now, even though you've tried in the past and you're still dealing with them?
- Do you think you have the internal expertise to deal with these challenges?
- How are you addressing these challenges in your plan?
- If you realize early enough in the year that this plan isn't fixing this challenge, how will you shift gears?

Goals

- What is your top priority this year?
- Do you have specific company goals?
- What are your top 3 initiatives this year/quarter?
- Do you have published revenue goals for this upcoming quarter/year?
- Are there any other company goals that are important?
- Do you have personal goals that go along with these?

Plans

- What specific initiatives are you doing to achieve _____ (restate their goal)?
- What is your plan to get there?
- What are you trying to achieve with the web site?
- What did you do for sales and marketing last year?

- What worked and what didn't?
- What are you going to do differently this year?
- How many people do you have in the Marketing/Sales department?
- What marketing/sales activities are you engaged in now?
- What marketing/sales activities do you have planned?
- What specific campaigns support these activities?
- Which ones are most successful?
- Which ones didn't work?
- Where do your best leads come from?
- How many leads are you generating currently?
- Is that good, bad, or ugly?
- How does your lead quality currently look?
- Are all leads created equal?
- Tell me about your sales team. Are they cold calling?
- What does the sales team think of the leads?
- If you are cold calling, who are you calling?
- Are you buying lists?
- How successful have you been with those lists?
- How many sales people are on the sales team?
- What makes a lead 'Sales ready' for you?
- How many leads do you need to hit your sales goals?
- How often do you reach that target lead goal?
- How much does it cost to acquire your leads/customers?
- What are you doing to reduce your cost per lead?
- How do you measure what's working?
- What did you do last year? What worked and what didn't? What are you going to do differently this year?
- Do you think xyz might make it hard to implement your plan?
- Do you anticipate that implementing this plan will go smoothly?
- Do you have the right resources available to implement this plan?
- Would you like to hear about how other people I've worked with have implemented plans like these?
- Are you open to thinking differently this year about how to reach your goals?

TCI

Timing

- When do you need to achieve these results?
- When do you need to hit _____ (state the goal)?
- What is the timeline to achieve _____ (state the goal)?
- What is the most critical date on your calendar? Why?
- For your overall timeline to happen, what needs to happen in the next 2 months?
- Is hitting this goal a priority right now?
- What else is a priority right now?
- Do you have bandwidth and resources to implement this plan now?
- Would you like help thinking through the steps involved in executing this plan, so you can figure out when you should implement each piece?
- Is it more likely that you will revise the goals, or revise the timeline, if they aren't realistic?

Cost of Inaction

Some questions below address the Costs of Inaction (consequences), others address the Rewards of Action (rewards), which is the inverse and can be used in a similar way.

- Have you thought about doing more of what you are doing today as a way of reaching your goals? Why...not
- What happens if you reach your goals? Does this affect you on a personal level?
- What happens if you don't hit the goal? Does this affect you on a personal level?
- Will it matter much if you don't reach your goals?
- What great things will you do next when you achieve this goal?
- When you hit your goals, what will you do next?
- Do you get bonuses, stand to get promoted, or get more resources if you can achieve this goal? Would you get fired, lose responsibility, or be demoted if you can't figure this out?

BA

Budget

- What you are currently doing to generate leads?
- What are your plans for marketing/sales for next year? (listen for budget changes)
- Have you seen a positive return on your growth investments in the past?
- (If yes) Do you plan on increasing your spend this year? Why or why not?
- (If no) Do you plan on decreasing your investment this year? Why or why not?
- What were you planning on investing to meet your goals?

Authority

- Tell me about your role in the company?
- How does your company typically make evaluations on working with a new partner?
What happens in the process?