

Sales Discovery Questions Checklist

Created by the team at [Weflow](#) ❤️

Type of question	Goal	Questions to ask
Fact gathering	Learning about the prospect's current situation. Aim to uncover details about their work environment, the processes and solutions they use, and what kinds of problems/challenges they're dealing with right now.	<ul style="list-style-type: none">• <i>Tell me about your company.</i>• <i>What does your day-to-day look like?</i>• <i>What is your work environment like?</i>• <i>What metrics/KPIs are you responsible for?</i>• <i>What is your current process for dealing with X?</i>• <i>What solution are you using to address that problem?</i>• <i>What's working or not working with your current solution?</i>• <i>What's the biggest challenge you face with X solution?</i>
Qualification	Determining whether the prospect is a good fit for your solution. Here, you're trying to assess their goals, priorities, and whether there's room in the budget for your solution.	<ul style="list-style-type: none">• <i>What are your goals?</i>• <i>What's your timeline for achieving those goals?</i>• <i>What problem are you trying to solve?</i>• <i>Are you experiencing problems related to X or Y (these are problems your solution addresses)?</i>• <i>What is the source of the problem?</i>• <i>Do you have room in your budget for this investment?</i>• <i>How much can you spend on solving this problem?</i>• <i>Where does the budget for solving this problem come from?</i>
Pain	Here, you're trying to figure out how serious they are about solving that problem. Uncovering pain points goes beyond identifying the pain, it's about understanding the impact and urgency that pain creates.	<ul style="list-style-type: none">• <i>How satisfied are you with your existing solution?</i>• <i>What happens if you don't solve X problem?</i>• <i>How much money are you losing to X problem?</i>• <i>What opportunities have you missed out on?</i>

		<ul style="list-style-type: none"> • <i>How does that impact your team?</i> • <i>How does it impact you personally?</i> • <i>What roadblocks do you believe are preventing you from achieving critical goals?</i> • <i>If X or Y happens, do you have a plan for dealing with the problem?</i>
Follow-up	<p>Follow-up questions provide you with a better understanding of the customer's commitment to change. Are they willing to take action, and if so, how soon?</p> <p>Essentially, it's about getting an idea of the timeline and how quickly you can expect the deal to close.</p>	<ul style="list-style-type: none"> • <i>What kind of results do you expect to see from a new solution?</i> • <i>When do you expect to see those results?</i> • <i>Is this currently a priority for you? Why/why not?</i> • <i>Have you defined criteria for selecting a vendor?</i> • <i>What other solutions are you considering?</i> • <i>Does our solution completely address X challenge?</i> • <i>If not, what's missing?</i> • <i>What would make this process easier — is there anything I can do to help?</i>
Next steps	<p>Finally, you'll want to guide buyers toward taking the next step. Aim to gather a few more details that can help inform how you'll proceed with working this deal, then end by making a recommendation.</p>	<ul style="list-style-type: none"> • <i>Who else should be involved in this decision?</i> • <i>Who should be invited to the demo?</i> • <i>Who else will this change impact?</i> • <i>If I can help you do X, what would we need to do to make a deal happen?</i>