The CharTec MSP GROWTH WORKBOOK

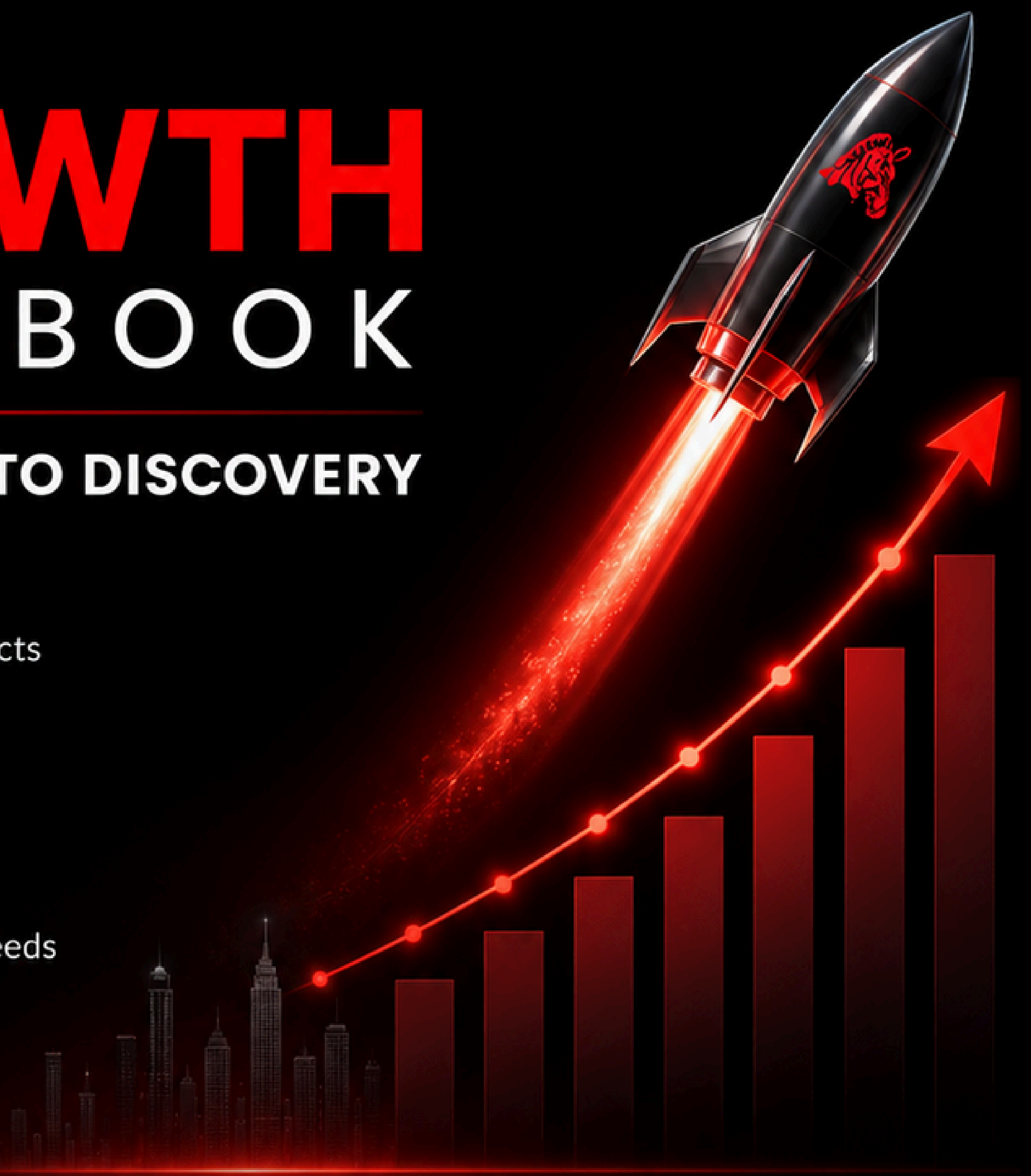
PROSPECTING TO DISCOVERY

FIND
the Right Prospects

ENGAGE
with Confidence

DISCOVER
Real Business Needs

GROW
Your MSP



CORE

Quarterly Planning Rhythm

- Marketing Message / 1st Interaction
- 1st Appointment
- Research
- Get the Discovery
- Perform the Discovery
- Get the Presentation Appointment
- Create the Presentation
- Perform the Presentation
- Present the Solution
- Get the Check /Follow up

CharTec Activity Schedule

Sales success is built on one foundational truth: **activity drives opportunity - not the other way around.** When reps stay disciplined in their daily actions, opportunities consistently appear, pipelines stay healthy, and results become predictable instead of reactive. Effective sales activity spans three key arenas: proactive prospecting (cold outreach, marketing follow up, networking, referrals, events), advancing deals through each stage of the sales funnel (first interactions, appointments, discovery, presentation, close), and farming or account management (nurturing existing clients, expanding services, and protecting revenue). When these activity streams work together, they create a steady rhythm of engagement that keeps opportunities flowing and prevents the feast-or-famine cycle that slows growth. Below is a sample activity structure to follow.

CharTec Activity Schedule

MODIFYING ACTIVITIES

1. Activity Type: Setup Tables – Activities – Activity Type

See Below for *SAMPLE* Activity Quota for sales person:

Sales Professional Quota = 350 Points

Activity Points Description			
Activities for Points	Point Value	Reccomended # of Activities to be completed	Total Points
Add a Prospect to the Funnel	3	15	45
1st Appointment	5	6	30
Discovery Meeting	7	3	21
Presentation Appointment	10	3	30
Follow Up Appointment to Close	10	3	30
2 Hr Call Block on Marketing tracks	15	12	180
Attend a Social Event/Trade Show	10	0	0
Host a Webinar or Lunch & Learn	10	0	0
Technology Business Review Meeting	20	0	0
Onsite Visit	5	0	0
		TOTAL	336

KEY
Sales Funnel Stages
Pro Active Activities to add to the funnel
General Farming Activites For Current Clients
Sales Professional Quota – 335

Prospecting Opener Samples

The strongest openers always contain **two ingredients:**

1. A **client-centric business outcome** your buyer actually cares about, and
2. A **curiosity-based question** delivered with **humble uncertainty**, which lowers resistance and opens the door to further conversation.

This framework gives you a plug-and-play way to build openers that do exactly that - without sounding scripted, salesy, or self-interested.

1. Name and company | 2. Legitimate reason for the call | 3. Possible desired outcome (positive reward or negative aversion) | 4. Call to action question

Sample: CPA/Financial

“Hi {Name}, {Your name and Company} here –partners keep telling me their team spends too much time chasing documents and fighting client portals – especially in busy season …. you may be interested to know we’ve built finance-focused programs to ease that…. I just don’t know if you’d benefit yet, but was calling to see… did I happen to catch you at a bad time?”

Sample: Legal (Law Firms)

“Hi {Name}, {Your name and Company} – many of the firms we support are trying to grow caseload per attorney without burning people out… to that extent we’ve put together some legalspecific programs to capture more billable hours while shrinking the time staff spends wrestling with case management and document systems…. I can’t say we’d be a fit yet, but was looking to explore it with you… did I happen to catch you at a bad time?”

Sample Medical (Non-Dental)

“Hi {Name}, {Your name and Company} – you may be interested to know we’ve recently created two new programs for medical practices that are increasing the number of patient visits per day, while cutting the time providers and staff spend dealing with billing issues nearly in half… um, I don’t know if we could replicate those results for your practice, but was calling to see… did I happen to catch you at a bad time?”
Why this framework works:

- It starts with a legitimate reason for the call rooted in a businesslevel outcome.
- It triggers curiosity by raising a problem they recognize but haven’t quantified.
- It uses humble uncertainty (“I’m not sure if we could help…”) to lower sales resistance.

Calling Talk Track

Most MSPs don’t lose deals because prospects say no—they lose them because they fail to earn the conversation in the first interaction.

When you sound like every other IT vendor and lead with who you are instead of what they’re experiencing, you lose attention before curiosity ever builds.

Strong first interactions flip that: lead with their business problems, keep it direct, and create just enough curiosity to pull them in—because the goal isn’t to explain, it’s to earn the next step.

By following this Talk Tract, you will leverage curiosity during your first call to the prospect.

Calling Talk Track

When sellers initiate contact with new prospects, one of two things will happen. Either a “live” person will answer your call, or it will be forwarded to a voicemail system. If your call forwards to voicemail, use QBS curiosity strategies to generate a return call. If your call is answered by a “live” person, use the QBS Lukewarm Calling template as follows:

1. Identify Yourself and Company

- Be Direct and To the Point

“Hi, Mr. Prospect. My name is John Smith and I’m with XYZ Company...

____

____

____

- Add Tag-Line for Clarity

“Hi, Mr. Prospect. My name is John Smith with XYZ Company...

...I’m on the team that works with large manufacturing accounts in__________.”

– don’t say –

...the leading provider of widgets in North America.”

Note: *If you have an existing relationship already, you can ask, “Did I catch you at a bad time?” If you don’t already have rapport, however, you must first legitimize a reason for calling, which requires sellers to combine steps one and two*

Calling Talk Track cont'd

2. Be Purposeful to Legitimize Your Reason for Calling

- Why should prospects "want to" talk with you?
  (i.e. Personal References, Associative References, and Glimpses of Value)

"Hi, Mr. Prospect, my name is John Smith with XYZ Company. I'm the District Manager for enterprise accounts in Central Illinois. I was hoping to catch you for a minute to discuss (insert legitimate reason for call). Did I happen to catch you at a bad time?"

____

____

____

3. Qualify that You are Dealing with the Right Person.

"Are you the person who handles _____________?"
"Are you the person responsible for _____________?"
"Are you the person I should be talking with about _____________?"

____

____

Note: *If you are not talking with the "right person," you can easily say, "Do you mind if I ask, who is?" Remember, your best coach in an account is the person on the other end of the conversation, whether it's a Vice President, a Middle Manager, or an Administrative Assistant.*

If the person says, "Yes, I am the right person," then you earn implied permission to proceed with the call (i.e. Step 4).

4. Secure a Forum for Selling

"Can I ask you a couple of specifics about _______________?"

____

____

____

Calling Talk Track cont'd

5. Diagnostic Questions for Credibility.

6. Broaden Your Opportunity with Issue and Implication Questions.

During the Call Reminders:

Gold Medals and German Shepherds (both) Needs come from Pain and Desire

7. Use Global Questions to Increase the Depth of Your Conversations.

"How do you mean?" "Like what?"

"What else?"

"How does that affect..."

8. Qualify Vague-o-nyms.

"When you say soon, Mr. Prospect, do you mean weeks or months?"

First Appointment Close Script

Most MSP sales conversations derail before they even start. Reps jump into solutions, flex their technical IQ, or dance around the ask; never actually securing the next step.

The result? Stalled pipelines and “nice chats” that go nowhere. As highlighted in your script , teams either avoid asking for the appointment entirely or ask so softly it’s practically a suggestion box. Hope is not a sales strategy...and “maybe we could meet sometime” isn’t a close.

The first interaction with a prospect isn’t about solving everything; it’s about earning the right to continue the conversation. Too often, MSPs dilute this moment by overexplaining or under-asking. The real opportunity is to confidently guide the prospect toward a clear next step: a structured appointment that positions your services as valuable, not casual.

What follows is our first appointment close script, designed to shift the dynamic. It frames the meeting as a meaningful business decision, presents options instead of yes/no pressure, and positions you as the one leading the process, not chasing it.

First Appointment Close Script

MSP: Good Morning! Thank you for calling XYZ Company. This is XYZ Person. How may I help?

Prospect: Hi, I was wondering how much your hourly rate is to come out and fix our computers?

MSP: I would be happy to give you the information you need, but since we have a couple of options based on the level of expertise required, can I ask you a couple of specifics about your company first?

Prospect: Sure.

MSP:

1. Can I get your name and Company? OK, what is your title?
2. Are you the person in Charge of IT or is there someone else we will be working with?
3. How many employees do you have?
4. Is this the only location or are there more?
5. Are your backups current or not?
6. Besides Microsoft applications, do you have any other main business applications that you run?
7. Is the entire Network down or just an individual workstation?
8. Okay, what's the issue?
9. Besides this issue are there any ongoing technology or network concerns?

First Appointment Close Script

MSP: Since you're concerned with X and Z, fixing those issues is part of what we do. But rather than just quote your hourly rates and products over the phone, as other tech companies do, how about I go over a couple of options we have?

Option 1:
I can send over a senior technician at a one-time discounted rate of $50 an hour.

Option 2:
Or our more popular option is to set up a time for one of our senior technicians to come out and troubleshoot your problem for two hours. While he is handling your problem, I would like 15 minutes of the owner's time to have a conversation about how you might be able to take advantage of what we do. This will all be done at no cost to you. Which way would you like to proceed?

Prospect: Option #2

MSP: Okay, Let's see what I have available.
(Close on next step: 1st Appointment)
MSP: Okay. Can we do Wednesday afternoon around 1:30 PM or would Thursday at 9:00 AM be better?

First Appointment Close Script

Prospect: Hi. This is (Name). What can I do you for?

Sales Rep: Hey (Name), (Your Name) from (Your Company) here. Thank you again for attending the Cyber Security Training Event last (Day)… you may be interested to know there are additional resources available to you that are helping our clients increase employee efficiency by up to 25% while reducing the risk of cyber exposure by nearly 92% in most cases, and I was looking to bring you up to speed on the latest… Did I happen to catch you at a bad time?

Prospect: No.

Sales Rep: Great. As I mentioned, there are additional resources available to you that are helping our clients mitigate the risk of cyber exposure for their businesses, but rather than go into a generic pitch, to make sure this is even relevant for you and your business, can I ask you a couple specifics about your company first?

Prospect: Sure.

Sales Rep: *(Go into Diagnostic Questions)*

1. To start - how many employees do you have?
2. Does anyone work from home, or is everyone working out of the office?
3. Now does everyone have their own PC or Laptop, or do they share devices?
4. With that being said, are these computers provided by the company, or do you allow the use of personal devices?
5. Let's switch gears - is your server located at your office, or hosted elsewhere? Do you know if your backups are current, or not?

First Appointment Close Script

6. Ok - besides the obvious Microsoft applications, are there any other core applications you use in the company?
7. Now thinking of cyber threats - Is there security training in place for your company?
8. Do you have a dedicated IT person or someone who handles IT among other duties?
9. Besides Cybersecurity, are there any other technology or network concerns you have?

Well (Contact name), if you're concerned (or have interest) in ____and _____, addressing these is part of what we do. But rather than just spewing out security jargon and throwing security solutions out with pricing all over the map before really understanding your needs as other tech companies do, how about I take a minute to explain a couple of options we have?

- Option 1: My security officer will perform a CyberSecure Baseline Assessment for your team. Just a few things you'll receive will be a security risk report, an overview of your company's health rating in terms of cybersecurity and a detailed list of your team's individual scoring for cybersecurity awareness and recommended training. The cost for us to perform this security check is $895.00.

- Option 2: Our more popular option, my security officer will perform the CyberSecure Baseline Assessment for you and allow me to come in and spend 15 minutes with the owner reviewing the results and further discussing how you might be able to take advantage of what we do. This will all be done at no cost to you. Which way would you like to proceed?

First Appointment Script

Most MSPs walk into a first appointment trying to impress instead of connect. They lead with credentials, awards, and certifications, assuming that credibility comes from talking about themselves.

It doesn’t land. As your script points out , prospects are not evaluating your résumé, they are evaluating whether you understand their world. The more you talk, the less credible you sound. It turns the meeting into a pitch instead of a diagnosis, and that kills trust before it has a chance to form.

In early conversations, credibility is not built by what you say, but by what you ask. The strongest MSPs do not lead with accomplishments. They lead with insight. By asking smart, specific questions about operations, users, security, and growth, they position themselves as a guide who has seen these challenges before and knows how to navigate them.

What follows is our Credibility Building First Appointment Script. It is designed to help you take control of the conversation, demonstrate real understanding, and earn trust without ever needing to prove yourself.

First Appointment Script

Goal:

1. Build Credibility
2. Close on the Discovery meeting

Introduce yourself and transition into diagnostic questions.

Use this if you're specifically asked to tell him or her about your services or company.

Mr. CEO, I did come prepared to discuss all the services we offer, but before I get too far into that, can I ask you a couple of specifics about your company?

Diagnostic Questions

- Besides this location, do you have any remote locations?
- About how many people do you have in each location?
- Are you typically 8-5 Monday through Friday or do you have extended hours or days?
- Do you guys run ConnectTow or Auto Tow? Version 14 or have you migrated to the newest version yet?
- Besides Microsoft applications, are there any other applications your staff runs?
- Do you allow employees to use their own devices or do you supply them?
- Do you have a dedicated IT person or does another employee handle those tasks?

First Appointment Script

Summarize:

Besides the obvious of looking to reduce response time and keeping your servers and workstations running to minimize downtime, are there any other IT concerns that keep you up at night?

Solution Transition:

Mr. CEO, if you're concerned about X, Y, and Z, solving those problems is our core business. Should I take a couple of minutes and explain how you might be able to benefit from what we do?

Address the Elephant in the Room- General IT

First, let me say this: Because there's so much noise in the marketplace, you've probably been inundated by people coming in here, wanting to pitch their services, using all kinds of IT jargon, and giving you prices that are all over the map. It probably gets to the point where you question which of these vendors want to help you versus which ones just want to take your money and leave.

Address the Elephant in the Room- Cybersecurity

First, let me say, there's a lot of noise in the IT industry today, especially as it relates to cyber security. You probably get tons of calls and emails from companies wanting to pitch their services, using fear tactics or all sorts of IT jargon with pricing all over the map to where it can get confusing about which company wants to truly help you vs. one who just wants to take your money and leave…

First Appointment Script

Value Proposition:

But at XYZ Company, our approach is a little different. What we like to do is come in and see the lay of the land. But just like a doctor who doesn't know anything about his new patient until he uses tools like X-Rays, scanners, MR Is, and maybe some bloodwork, we need to analyze your network and spend some time understanding how it's constructed. But rather than generically talk about all of this, may I suggest one of two options?

- Option 1:

My sales engineer will come in with his network analysis software and take an in-depth look at your network. He'll provide you with a risk report, full network assessment report, detailed asset report, and network site diagram. Your end product will look something like this (provide an example). The cost for our company to do this is $2,500.

- Option 2:

Our more popular option is for me and my engineer to complete a network analysis. Give us an hour to review the executive summary of your network with the officers of your company, and we'll outline the good, bad, and ugly. If there's a need for it, we'll also cover our services and solutions at this point. This is free of charge.

Which option would you prefer?

Prospect: Option #2

Close on next step: Discovery

MSP: Okay, can we schedule a time on Tuesday to conduct your analysis? Or would Wednesday work better for you?

First Interaction: Objection Handling

Pricing Up Front

Prospect: "Before we get too far into this - how much do you charge?"

Sales: "I'd be more than happy to give you the price, but because every solution is different based on logistics and system requirements - can I ask a couple specifics about your company first to ensure I give you relevant information?"

Prospect: "Can you give me a ballpark of your pricing?"

Sales: "I can absolutely provide you numbers, but to ensure I'm not throwing out something that doesn't apply to you. Can I ask you a couple of specifics about your company first to make sure I provide you with relevant information?

Prospect: "How much is this going to be?"

Sales: "I'm more than happy to walk through the potential investment, but since our solutions are designed around your actual setup and needs, not just a one-size-fits-all model like other IT companies do.... to ensure you get relevant information - Can I ask you a couple specifics about your company first"

Prospect: "I'm going to need a price before we move forward?"

Sales: "I'm happy to share pricing, but since every environment is different and built around how your business actually operates, to provide you with information that's relevant - can I ask you a couple specifics about your company first"

First Interaction: Objection Handling

Pricing Up Front

Prospect: "I need to know what this is going to cost."

Sales: "Totally fair — pricing depends on your setup and needs. Can I ask a couple specifics about your company first so I give you accurate information?"

Prospect: "Can you give me a rough idea on price?"

Sales: "I can give you numbers, but I don't want to throw out something generic. Can I ask a couple specifics about your company first to ensure it applies?"

Prospect: "Before we go any further, what does this cost?"

Sales: "I'm happy to share pricing, but since every solution is different, can I ask a couple specifics about your company first to make sure it's relevant?"

Notes

CharTec Discovery Conversation Guide

Discovery falls apart the moment you stop being present.

If you're buried in notes during Discovery, you're missing the real conversation.

Not the technical answers — the business implications behind them.
The hesitation.

The frustration.

The "we make it work" comments.

That's where the real issues surface.

A CEO feels risk and stalled growth.
Operations feels inefficiency.
Staff feel friction and lost time.
Sales feels slowed revenue.
And if your head is down typing, you'll miss it.

Here's the move:
Record the conversation.
Use AI to transcribe it.
That frees you up to stay engaged, ask deeper questions, clarify vague answers, and uncover what each stakeholder is actually experiencing.
Because Discovery isn't about documenting infrastructure.
It's about helping people articulate the business problems they already feel — but haven't fully connected yet.

That's Discovery done right.

CharTec Discovery Conversation Guide

It's time for some work.

Technical issues are provided below. List the implications associated with each issue.

Unknown Backup Status

Response Time

Speed

Unpredictable Expenses

Downtime

Outdated Technology

Active Directory

Old Website

CharTec Discovery Conversation Guide

Now for those business issues.

List the implications associated with each business issue.

Client Service

Budgeting

Marketing

Client Retention

Sales

Growth

Culture

Productivity

Discovery Worksheet (CEO)

Why do so many MSP deals stall before they ever reach the presentation stage?

Most MSP deals don’t stall because of price or competition; they stall because discovery goes wrong. When you talk too much and unload your services too early, you kill curiosity and lose the opportunity before it develops.

Strong discovery flips that: ask, listen, and let them reveal the problem...because when they talk more, you learn more, and they start to see the need to move forward.

In this worksheet, you will find a list of global questions designed to pull information out of the person being interviewed, along with a sample script for you to follow.

Discovery Worksheet cont'd

Global Questions:

- How do you mean…?
- Tell me more…?
- How so…?
- And then what happened…?
- What else…?
- Can you walk me through…?
- Can you say more about that…?
- Like what…?
- When that happened what happened next…?

Useful transition phrases to blend the next question without the interrogation effect:

- "I'm not surprised to hear you say that …"
- "Well let me ask you this then…"
- "With that being said…"
- "In the event that…"
- "With this in mind…"
- "To put it another way…"
- "That brings us to…"
- "Keeping these points in mind…"
- "Lets begin with…"

Goal:

The goal here is to revisit the issues we spoke about on the first appointment and "set up" issues/implications during our discussion to identify their challenges.

Contact____________________

Business and technical issues important to this contact.

1.____
2.____
3.____
4.____
5.____
6. ____
7.____
8.____
9.____
10.____

Discovery Worksheet cont’d

Greeting:

Hi Mr. CEO. Thank you for having me back. I have brought my engineer, __________ with me to get into the technical side while I focus on the business. When we talked last, you were concerned about a number of items, one of which was your backup. Let's start there. What's going on with it?

1. Ok, you also mentioned you were concerned about the speed of the network. What do you mean?
2. You also talked about Mary and how much time she is spending NOT managing the office. What's going on there?
3. Many of our other clients are also in 24/7 operations. Can I ask you a couple of specifics about your after-hours support tactics?

Diagnostic #1 ____

Diagnostic #2 ____

Diagnostic #3 ____

4. We have many clients like yourself that allow employees to use their own devices at work. So to make sure I understand your situation, can I ask you a couple of specifics about your device and remote working policy?
    a. Currently, do you have remote workers or allow people to work from home?
    b. Are employees responsible to back up company files?
    c. Should they quit or get fired, do you have a procedure to get your data off their devices, or not?
5. Ok. Let's switch gears a bit; are there any growth plans over the next 18 months?
6. I'm also going to need a copy of your telco bills and internet bills. Who would be the best person to get those from?

Discovery Worksheet cont'd

7. Hey, just one more thing. It's obvious you guys are very reliant on technology. Should there ever be a time when our techs or hardware fail, considering lost revenues and wages, what would that be costing your company in downtime for a day, if you had to put a number to it?

Issues/Implications

1. ____

____

2. ____

____

3. ____

____

4. ____

____

5. ____

____

6. ____

____

Close: Okay, I think I understand your core challenges. The rest of the day we will take a deeper dive with your organization. If I have other questions later would it be ok if I stop by?

Discovery

Business Issues and Implications

Endless Implications.

On the following pages, we've listed five positions you'd find within a typical business. With each position, we've uncovered common business issues these positions would encounter on a daily basis. List the implications associated with each business issue and then see if you can expose any additional business issues the designated position would come across.

Business Issue: Growth

Common Implications

Business Issue: Profit

Common Implications

Business Issue: Strategy

Common Implications

Business Issue: Reputation

Common Implications

Business Issue: Speed

Common Implications

Business Issue: Leads

Common Implications

Business Issue: Remote Access

Common Implications

Business Issue: Sales

Common Implications

Business Issue: Website

Common Implications

Business Issue:

Common Implications

Business Issue:

Common Implications

Business Issue:

Common Implications

Business Issue:

Common Implications

Business Issue:

Common Implications

Business Issue:

Common Implications

Common Implications

CharTec®

CEO

Greeting:

Hi Mr. CEO. Thank you for having me back. I have brought my engineer, __________ with me to get into the technical side while I focus on the business. When we talked last, you were concerned about a number of items, one of which was your backup. Let's start there. What's going on with it?

1. Ok, you also mentioned you were concerned about the speed of the network. What do you mean?

2. You also talked about Mary and how much time she is spending NOT managing the office. What's going on there?

3. Many of our other clients are also in 24/7 operations. Can I ask you a couple of specifics about your after-hours support tactics?

Diagnostic #1 ____
Diagnostic #2 ____
Diagnostic #3 ____

4. We have many clients like yourself that allow employees to use their own devices at work. So to make sure I understand your situation, can I ask you a couple of specifics about your device and remote working policy?

   a. Currently, do you have remote workers or allow people to work from home?
   b. Are employees responsible to back up company files?
   c. Should they quit or get fired, do you have a procedure to get your data off their devices, or not?

5. Ok. Let's switch gears a bit; are there any growth plans over the next 18 months?

6. I'm also going to need a copy of your telco bills and internet bills. Who would be the best person to get those from?

7. Hey, just one more thing. It's obvious you guys are very reliant on technology. Should there ever be a time when our techs or hardware fail, considering lost revenues and wages, what would that be costing your company in downtime for a day, if you had to put a number to it?

Close: Okay, I think I understand your core challenges. The rest of the day we will take a deeper dive with your organization. If I have other questions later would it be ok if I stop by?

CORE

CharTec Discovery to Close Script

The end of Discovery is where most MSPs lose control.

Some go silent and awkward.

Others jump straight into pitching.

Both kill momentum.

Because the goal of Discovery isn't to sell.

It's to earn the presentation appointment.

Here's the move:
Use CharTec's **"Discovery to Close"** Script below.

It works because you'll be guiding the next step with confidence.

You'll sound like a Leader diagnosing a business issue — not a vendor chasing a sale.

CharTec Discovery to Close Script

Greeting:

Hi Mr. CEO. Thank you for having me back. I have brought my engineer, __________ with me to get into the technical side while I focus on the business. When we talked last, you were concerned about a number of items, one of which was your ______. Let's start there. What's going on with it?

1. Ok, you also mentioned you were concerned about the ___________. What do you mean?

2. You also talked about [NAME] and how much time they are spending NOT managing the office. What's going on there?

3. Many of our other clients are also in 24/7 operations. Can I ask you a couple of specifics about your after-hours support tactics?

Diagnostic #1 ____
Diagnostic #2 ____
Diagnostic #3 ____

4. We have many clients like yourself that allow employees to use their own devices at work. So to make sure I understand your situation, can I ask you a couple of specifics about your device and remote working policy?

   a. Currently, do you have remote workers or allow people to work from home?
   b. Are employees responsible to back up company files?
   c. Should they quit or get fired, do you have a procedure to get your data off their devices, or not?

5. Ok. Let's switch gears a bit; are there any growth plans over the next 18 months?

6. I'm also going to need a copy of your phone bills and internet bills. Who would be the best person to get those from?

CharTec®

CharTec Discovery to Close Script

7. Hey, just one more thing. It's obvious you guys are very reliant on technology. Should there ever be a time when our techs or hardware fail, considering lost revenues and wages, what would that be costing your company in downtime for a day, if you had to put a number to it?

Issues/Implications

1. ____

____

2. ____

____

3. ____

____

4. ____

____

5. ____

____

6. ____

____

Okay, I think I understand your core challenges. The rest of the day we will take a deeper dive with your organization. If I have other questions later would it be ok if I stop by?

Close (*Once you have wrapped up all other interviews*): Alright, MR. CEO. I interviewed your office manager, finance, operations, and sales teams, along with administration and even parts of your remote staff.... I've gathered extensive notes from those conversations and received the technology invoices from [NAME] in payables that still need to be fully audited. My engineer is also wrapping up the technical portion of the assessment.

There's enough here that I want to be deliberate in how it all comes together. I'll need about a week to complete the analysis and document the findings properly. With that said, does next Wednesday or Thursday work better to review the results with you and the executive team?

CORE

Discovery Checklist

Company:__________________ **Vertical:** _________________ **Domain:** _________________
Address:____

Pre-Discovery Preparation:

☐ **Who are you Meeting with?**

Name:Title:

____

____

____

☐ **Social Media and LinkedIn Review**

- Mutual Connections or Associations to reference for Icebreakers?

☐ **Diagnose and Discovery Form Printed**

☐ **Top Two LOB's for this Vertical with current Version Information:**

1.

2.

☐ **Company Website Review**

- What are their Products or Services?
- How many Locations?
- About them?
- Any Associations they Support?
- How long ago was the site updated?
- Overall Impression?

☐ **Dark Web Scan – Number of Exposures:**___________ **Most Recent Date:**_________

☐ **3-5 Diagnostic Questions by Role Ready**

- CEO/CFO/CIO/COO
- Office Manager
- Receptionist
- IT Person
- Sales Manager
- Marketing Manager
- Accounting
- Frontline Staff

Discovery Checklist cont'd

- [ ] **Business Issues and Implications**

- Have (3) Business Issues and (3) Implications for each Issue Ready

- [ ] **Watch and Review Discovery Role-play Videos**
- [ ] **Test Audio Recording Device**
- [ ] **Is Server Admin Access Available? If not, have Site Survey prepared**

Discovery – Don't Forget…

1. Do NOT discuss SOLUTIONS!
2. Don't Talk Tech
3. Practice Active Listening
4. Use Transition Statements
5. Use your Global Questions to EXPAND on Business Issues!!
6. Speak With as Many Employees as Possible

Discovery (Before you Leave)

- [ ] **Have Secured Date and Time for Presentation (Allow 5-7 Days for Prep)**
- [ ] **Confirm the Decision-Making Process (and invite all to the Presentation)**
- [ ] **Know the Cost of Downtime Per Day for this Company**
- [ ] **Diagnose and Discovery Agreement Signed**
- [ ] **Vendor Management Info – Company Names**
- [ ] **Copy of Internet, Phone, Copier/Print Invoices (60 Days Preferably)**
- [ ] **Copy of Cyber Liability Policy**
- [ ] **Copy of their Employee Handbook**
- [ ] **$$ Amount Associated with Each Implication**

- Time Wasted (SPAM, PC/Server Re-boots, Re-creating Docs, Etc.)
- Overspend (Projects, Hardware/Software, Telco, Etc.)
- Time Waiting (IT Support, Parts Replacement, Vendors, Etc.)
- Downtime

READY FOR MORE HELP?

If you want help generating more leads, tightening your sales process, building repeatable systems your reps can actually follow, or closing deals that increase your MRR every single month…

If you're tired of guessing, piecing together scripts, or hoping your team "figures it out"…

👉 Schedule a call and we'll walk you through the exact Sales + Marketing framework top MSPs use to grow on purpose:

https://chartec.net/schedule

Let's build something predictable - and profitable.