

80

Discovery & Qualifying Questions

TO WIN MORE SALES AND
ADVANCE COMPLEX,
LONG-TERM SALES CYCLES

An inquiry and coaching based conversation to uncover the facts, qualify complex opportunities, align stakeholders, and advance every step in your sales process with greater clarity and confidence.

KEITH ROSEN



How to use this playbook

The goal is a candid conversation—not a buyer interrogation.

Start with the 16 core questions.

Use the other 64 only when they clarify an important gap.

01 Follow the buyer's language

Let their answers determine the next thoughtful question.

02 Do not force all 80 into one call

Discovery is a conversation, not a deposition. Nobody enjoys being cross-examined before coffee.

03 Recap at the right moments

Summarize after pain and impact, stakeholders and decision path, and priority and timing.

04 Qualify mutually

Use the conversation to decide whether both sides should continue.

The conversation flow

Eight stages move from candor to an accountable next step.

01

Contract for candor and a next step

05

Map people and the decision path

02

Define the business outcome and behavior change

06

Qualify budget and economic value

03

Expose root pain and consequences

07

Confirm priority, timing, and readiness

04

Understand the current state and past attempts

08

Resolve concerns and secure an owned next step

Six principles protect the integrity of discovery

The quality of the conversation matters as much as the questions.

1**Diagnose before prescribing.**

Do not present a solution until the problem, outcome, stakeholders, economics, and timing are clear.

2**Create urgency with truth.**

Explore real consequences, missed opportunity, and personal impact; never manufacture fear.

3**Use the buyer's words.**

Summarize what you heard and ask for correction before advancing.

4**Qualify mutually.**

A good discovery call determines whether both sides should continue.

5**No orphan proposals.**

Do not send a proposal without agreement on criteria, stakeholders, budget logic, and a scheduled review.

6**End with accountability.**

Name the owner, deliverable, and date before every meaningful conversation ends.

Opening talk track

Set expectations for a candid, mutual decision before discovery begins.

“

Thanks for making the time to explore how we can work together. My goal is to understand what you want to change or improve, why it matters, what you have tried, and how decisions are made so I can respect your process. I'll be candid if I believe we can help and equally candid if I can't. In the spirit of time, I'd deeply appreciate if you can do the same.

If there is a fit, let's agree on a concrete next step before we finish. If there isn't, we can say that too. Does that work for you?”

“Great. Also, please know that whatever we discuss will always be held in strict confidence.”

CANDOR • MUTUAL FIT • NEXT STEP

Opening, Trust, and Expectations

Lower resistance, establish mutual expectations, earn permission, and create a candid two-way conversation.

NON-NEGOTIABLE QUESTIONS

01

CORE

What would make this conversation genuinely valuable for you, and what do you need to leave with?

02

CORE

If we determine there is a fit, are you comfortable agreeing on a specific next step before we finish our conversation?

03

CORE

To avoid being redundant, how much do you already know about... (us, the industry, the solutions in the market)? What have you heard about us, and what would be useful to know before we begin?

04

What prompted you to take this conversation now?

05

What is your role in this initiative, and how will its outcome affect you?

06

How candid can we be about what is working, what is not, and what may be getting in the way?

Opening, Trust, and Expectations

Additional essential questions—use as needed.

07

Who or what led you to us?

08

Is there anything important happening in the business that I should understand before we explore the need?

09

What questions are already on your mind?

10

Other than you, is there anyone else whose perspective we should account for during this conversation?

PLAYBOOK REMINDER

Ask one thoughtful follow-up at a time. Follow the buyer's language and clarify only what matters.

Business Context, Goals, and Desired Change

Connect the request to business priorities and define the change the buyer actually wants—not merely the event, program, or service requested.

NON-NEGOTIABLE QUESTIONS

11

CORE

What is the most important business outcome you need to improve, and why does it matter now?

12

CORE

What specific behaviors or results must change for this initiative to be considered successful?

13

What is happening in the business that created this need?

14

How does this initiative support your organization's top priorities?

15

What would success look like in measurable terms?

16

Who needs to perform differently, and what must they do differently?

Business Context, Goals, and Desired Change

Additional essential questions—use as needed.

17

What would you want leaders, managers, and sellers to say is different six months afterward?

18

Which metrics are most important: revenue, conversion, retention, ramp time, forecast accuracy, productivity, engagement, or something else?

19

What should remain unchanged because it is already working well?

20

If you could solve only one part of this challenge first, which part would create the greatest return?

PLAYBOOK REMINDER

Ask one thoughtful follow-up at a time. Follow the buyer's language and clarify only what matters.

Pain, Impact, and the Cost of Inaction

Move from symptoms to root cause; make the consequences of staying the same visible without exaggeration or pressure.

NON-NEGOTIABLE QUESTIONS

21

CORE

What is the biggest challenge preventing the result you want, and what do you believe is causing it?

22

CORE

What is this costing the business—and you personally—if it remains unresolved for the next 6 to 12 months?

23

Where does this problem show up most often?

24

Who is most affected, and how?

25

What are people complaining about, avoiding, or losing confidence in?

26

How does this affect revenue, customers, turnover, morale, or execution?

Pain, Impact, and the Cost of Inaction

Additional essential questions—use as needed.

27

What secondary problems does this create for managers or senior leaders?

28

What happens if growth continues but this capability does not improve?

29

What have you normalized or tolerated that can no longer continue?

30

If nothing changes, what outcome are you most concerned about?

RECAP BEFORE YOU ADVANCE

“Let me make sure I have this right...” Summarize the problem, root cause, impact, and cost of delay. Then ask: **“What did I miss or misunderstand?”**

Current State, Process, and Past Experience

Understand the operating reality, expose gaps, and learn from previous attempts before recommending anything.

NON-NEGOTIABLE QUESTIONS

31

CORE

What are you doing today to address this, and where is the current approach breaking down?

32

CORE

What have you tried before, what were the results, and what must be different this time?

33

How are people currently hired, onboarded, trained, coached, and reinforced?

34

Do you have defined sales, leadership, or coaching competencies?

35

Do managers share a consistent coaching process and language?

36

How much time do managers actually spend coaching versus directing, rescuing, or inspecting?

Current State, Process, and Past Experience

Additional essential questions—use as needed.

37

How do you measure coaching quality and behavior adoption?

38

How are your sales process, CRM, performance metrics, and coaching process aligned?

39

What did participants and leaders like or dislike about previous programs?

40

How have you sustained learning after prior training ended?

PLAYBOOK REMINDER

Ask one thoughtful follow-up at a time. Follow the buyer's language and clarify only what matters.

People, Stakeholders, and Decision Process

Map influence, authority, approval, implementation ownership, and the real path to a decision.

NON-NEGOTIABLE QUESTIONS

41

CORE

Who, besides you, must support or approve this, and what matters most to each person?

42

CORE

Can you please walk me through how a buying decision like this gets made so I can ensure I respect your process?

43

Who owns the business result?

44

Who will evaluate potential partners and make the recommendation?

45

Who controls the budget?

46

Who could slow, block, or redirect the decision?

People, Stakeholders, and Decision Process

Additional essential questions—use as needed.

47

Who will own implementation and reinforcement after launch?

48

What information will each stakeholder need to feel confident?

49

What decision criteria will you use, and how will they be weighted?

50

When and how can we include the other key stakeholders in the next conversation?

RECAP BEFORE YOU ADVANCE

Confirm the stakeholders, decision criteria, approval path, and access required. Ask: “Is this the actual process, or is there an informal step we should plan for?”

Budget, Value, and Commercial Fit

Qualify investment capacity, connect price to value, and prevent proposals that cannot be approved.

NON-NEGOTIABLE QUESTIONS

51

CORE

How is an initiative like this funded, and what investment range can realistically be approved?

52

CORE

What measurable value or return would make this an easy decision to defend?

53

Is funding already allocated, or would a business case need to be created?

54

Whose budget would this come from?

55

What has the organization invested in comparable initiatives?

56

What financial threshold requires additional approval or procurement?

Budget, Value, and Commercial Fit

Additional essential questions—use as needed.

57

How do you compare price, risk, expertise, customization, and sustained adoption?

58

What costs are you already carrying because the problem is unresolved?

59

What would make an investment feel too small to solve the problem—or too large to justify?

60

If the solution meets the agreed outcomes and range, is there any commercial issue that would still prevent moving forward?

PLAYBOOK REMINDER

Ask one thoughtful follow-up at a time. Follow the buyer's language and clarify only what matters.

Priority, Timing, and Readiness

Test whether the initiative is truly urgent, identify dependencies, and distinguish interest from commitment.

NON-NEGOTIABLE QUESTIONS

61

CORE

By when must results begin to show, and what business event or consequence drives that date?

62

CORE

Among competing priorities, where does this rank—and what could cause it to lose priority?

63

When would you ideally begin?

64

What happens if the start date slips by a quarter?

65

Are there leadership changes, hiring plans, launches, or planning cycles affecting timing?

66

What internal resources must be available for this to succeed?

Priority, Timing, and Readiness

Additional essential questions—use as needed.

67

How much participant and manager time can the organization realistically commit?

68

What approvals, procurement steps, legal reviews, or vendor requirements affect the schedule?

69

How ready are managers to reinforce new behaviors after the formal work ends?

70

On a scale of 1 to 10, how committed is the organization to solving this now; what keeps it from being a 10?

RECAP BEFORE YOU ADVANCE

Confirm priority, target dates, dependencies, resources, and consequences of delay. Ask:
“Given all of that, does moving forward still make sense?”

Fit, Concerns, and Accountable Next Step

Surface hidden objections, test mutual fit, and finish with a dated, owned next step—not a vague promise to follow up.

NON-NEGOTIABLE QUESTIONS

71

CORE

Based on what we discussed, what concerns, if any, or unresolved questions could prevent us from working together?

72

CORE

How are you feeling about our conversation? How well did we meet your expectations?

73

How does our approach align with what you need?

74

What have I not asked that would be important before recommending a solution?

75

What would you need to see from us to feel confident moving forward?

76

What if any, additional options, including waiting, outsourcing, or handling this internally might you be considering?

Fit, Concerns, and Accountable Next Step

Additional essential questions—use as needed.

77

What will determine which option you choose?

78

If you had to make the decision today, what would it be—and why?

79

Other than you, who else should attend the next meeting so we can make meaningful progress?

80

Can we put the next meeting and the required preparation on the calendar now?
(What is the exact next step, who owns it, and when will it be completed?)

PLAYBOOK REMINDER

Ask one thoughtful follow-up at a time. Follow the buyer's language and clarify only what matters.

Recap and transition language

Use the buyer's words, confirm your understanding, and earn permission to advance.

AFTER PAIN + IMPACT

"Here is what I'm hearing: [current problem], caused or intensified by [root cause], affecting [people/metrics], and creating [business/personal impact]. Did I capture everything correctly or did I miss something?"

BEFORE DISCUSSING SOLUTIONS

"Before I recommend any solution, I want to ensure I understand how you typically make decisions around projects, the investment logic, vendor vetting process, and the timing. May I ask a few questions about those so I can ensure I provide you with the information you need?"

WHEN AN ANSWER IS VAGUE

"Thanks for sharing. When you say, ***"your last implementation failed and need to ensure proper deployment of the best product to hit our targets and expectations"***, can you please share a specific example, so I have a better understanding of your experience?"

WHEN URGENCY IS UNCLEAR

"Why address this now rather than six months from now?"

WHEN BUDGET IS AVOIDED

"I'm not asking you to commit to a number today. To design the best solution for you, how do you typically budget for something like this, so I can understand what is realistic so neither of us spend time on a solution that cannot move forward."

Accountable closing talk track

Replace vague follow-up with a specific owner, deliverable, decision, and date.

01 • CONFIRM THE CASE

“Based on what we discussed, you want to achieve [outcome], the current gap is [problem], and delaying it risks [consequence]. The people involved are [stakeholders], the decision will be based on [criteria], and the target timing is [date]. Is that accurate?”

02 • SURFACE WHAT REMAINS

“What concerns or unresolved questions, if any, could prevent us from moving forward?”

03 • OWN THE NEXT STEP

“To confirm, the next step is [specific action]. [Name] will complete [deliverable] by [date], and we will meet on [date/time] with [attendees] to {finalize which direction you want to go}. Let’s put that on the calendar now. If something changes, can we respectfully agree to tell each other directly rather than let the process drift?”

Qualification exit criteria

Before investing in a proposal or solution design, confirm clear answers in every area.

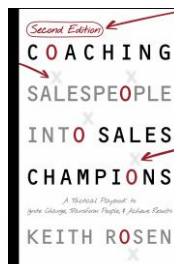
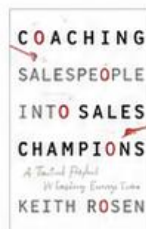
- ☐ Business outcome and measurable success
- ☐ Root problem, consequences, and cost of inaction
- ☐ Required behavior change and affected audience
- ☐ Current process and lessons from past attempts
- ☐ Decision-makers, influencers, blockers, and implementation owner
- ☐ Decision criteria and approval process
- ☐ Realistic investment logic or funding path
- ☐ Priority, target timing, and internal readiness
- ☐ Known concerns and competing options
- ☐ Scheduled next step with owner, deliverable, attendees, and date

NO CLEAR ANSWERS? NO ORPHAN PROPOSAL.

KEITH ROSEN

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6

Continents

75+

Countries

5

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- Featured in Entrepreneur, Inc., Fortune, The New York Times, The Wall Street Journal, and CEO/CFO magazine.
- Appeared on the award-winning television show Mad Men, Season Four.
- Keith was the first to develop and launch Microsoft's and Oracle's global sales leadership coach training initiative for their global sales leaders and have continued our partnership since 2009.

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- **Improve Acquisition and Retention**
of customers and top performers.
- **Reduce Your Workload**
and save over 20 hours every week on unproductive, wasteful activities.
- **Confidently Turn Around Underperformers**
in 30 days or less.
- **Create Team Alignment and Buy-In**
around coaching and strategic change to improve daily performance metrics.
- **Coach Your Customers**
to succeed.

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