



# 19 Questions to Ask on a Call During the Sales Discovery Process

*By TAG LENDING GROUP*

Closing calls are sexy. They're the calls where a deal gets moved across the line, contracts get signed, and you earn your commission checks!

Depending on who you sell to and what you sell, you could have already spent 10 to 20 hours with your prospect. You should have a good idea of whether the deal will close and for how much.

## **WHAT IS A DISCOVERY CALL?**

In many cases, the discovery call – the first call after connecting with a prospect – is the most important in the sales process. It sets the tone for the entire relationship, both pre-and post-sale.

Either you'll be able to establish an authoritative relationship, or you'll be stuck playing catch up (learn how to avoid those discovery call mistakes).

### **Discovery Questions**

1. Tell me about your job role. What do you do day-to-day?
2. Tell me about your goals (financial, customer-related, operational).



3. When do you need to achieve these goals by?
4. What problem are you trying to solve?
5. Are you having problems in [area as relates to the program or home]?
6. What's the source of that problem?
7. Why is it a priority today?
8. Why hasn't it been addressed before by another lender/realtor?
9. What do you think could be a potential solution? Why?
10. What would a successful outcome look like?
11. Do you have a plan in place to address this problem?
12. What are your primary roadblocks to implementing this plan?
13. What's your timeline for implementation?
14. Do you have written decision criteria, A.K.A  
Road Map to Home Ownership!
15. Have you purchased a similar home before in the past?
16. What are your potential curveballs?
17. How can I help make this easy for you and your family?
18. How will this solution make your life better? (Present a Solution)
19. If you implement this solution, will you continue working with us, and are you 100% Committed?

**Let's TAG TEAM this deal! ®**

