

CREATIVE
AGENCY
SUCCESS

Discovery Calls

The Conceptual Buy-In



Notes

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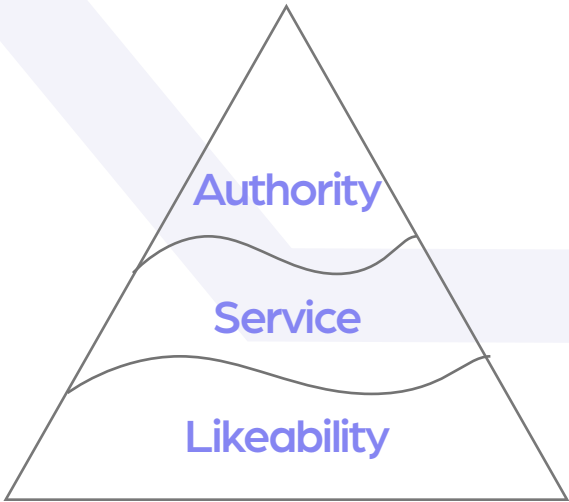
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Discovery Session



Proposal



Signed Contract

- ~~Price~~
- Value
- Trust

Strategy Session

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SOLUTIONS

1. Welcome

- We are scheduled for 1 hour for the meeting today. Does that still work for you?
- Out of respect to your time, lets be sure to stick to schedule. Sound Good?
- The goal for this call is to review your goals and to understand your challenges in depth.
- Are you comfortable having that conversation today?
- When we last spoke you outlined _____
- Is that still the case?
- Great, to start us off would like to introduce you to _____

2. Background

Tell me more about your firm, how you operate?

Stakeholders for decision

Revenue

Cost per lead

Client lifetime value

Marketing Team Members

Marketing Conversion Rates

Sales Conversion Rate

Marketing Budget

Marketing Verticals & Content

How many agencies are you currently working with?

3. Objectives

What do you want to achieve in 3-5 years?

Cost per lead

Marketing Conversion Rate

Sales Conversion Rate

Personal Rating (1 - 10) on your Messaging & Creative

Any Goals for Brand/ Project Recognition?

Strategy Session continued

4. Challenges

What changes need to be made, what are the key issues and challenges?

Why does it matter for you?

What if these challenges aren't overcome?

Note: Acknowledge Issue, provide advice, challenge mindset

Possible Questions

What do you want to achieve in 3–5 years?

5. Value & Impact

If we were able to accomplish <goal 1> and <goal 2>, I imagine that would feel pretty great?

How would it impact your department?

What do you think <boss> reaction would be?

6. Timing

If this is a later or sooner project to get started on?

LATER / SOONER

Follow up date booked

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