

Driving enterprise sales | Discovery & demo calls

Insights from Recall.ai's Amanda Zhu COO guide on driving seven-figure enterprise deals

Discovery call talk track

Call objective: If the prospect is qualified, the goal of this discovery call is to build enough value and intrigue to earn a demo. Provide compelling reasons for them to want to meet with you again.

SETTING THE STAGE (Greetings and rapport building)

Opening: "Thanks for taking the time to meet today. I think the best place to start is understanding what you're trying to accomplish. [Give brief context on your product and company.]

Before we dive in, I want to be upfront: if it turns out we're not the right solution for what you need, I'll be honest about that and point you in the right direction.

And if this sounds like a good fit, we can set up a technical demo on a separate call so I don't waste your time today. Does that sound good?"

DISCOVERY QUESTIONS

| CURRENT SITUATION | PROBLEM |
|---|---|
| <ul style="list-style-type: none"> ● What is your current situation? ● How much have you explored solutions so far? ● What tools are you using in these workflows today? | <ul style="list-style-type: none"> ● What challenges have you run into with what you've tried so far? |
| IMPACT | BENEFITS / IDEAL SITUATION |
| <ul style="list-style-type: none"> ● Of all the things you're working on right now, how would you prioritize this? Is this number 1 on your list? Number 10? ● Why is this being prioritized now? What are the potential negative impacts to the business if you don't address this? What does success look like? ● How does this purchase align with your team's current priorities? ● If these challenges aren't addressed, what negative business consequences would you anticipate? | <ul style="list-style-type: none"> ● What would an ideal solution/workflow look like to you? ● What positive (measurable?) business outcomes are you hoping to achieve? ● What would it mean for the business if you implement this and it's a home run? |

RECAP PAIN POINTS

- "Great, just to make sure we're on the same page, you want [give brief recap]. Is there anything I'm missing?"
- (Let them answer)

COMMUNICATE VALUE

- "Excellent. Let me share more about [Company]. [Share product and company overview.]
- People work with us for [X] reasons: [Share what types of companies work with you and why.]
- Does that all make sense? Are there any questions I can answer based on what I just shared?"

Q&A SESSION

(Let them ask questions, provide value!)

SCHEDULE DEMO

"Great! So the next step is to set up a demo. The demo will cover [X] things: [Share what the demo will go through.]

Scheduling the meeting: How does tomorrow at 2pm PST work? I try not to go more than 2 days out so we can nail down a definitive day and time, then I'll send a calendar invite.

(Wait for confirmation)

Just sent the invite! Can you confirm you got it at the right time?

(Wait for them to confirm)

Perfect! I'm excited for the demo tomorrow. If you have any questions before then, just email me—we're happy to help. Have a great rest of your day!"

Demo call talk track

DEMO CALL

Call Context: The demo is typically a huge "aha moment" for end users. The more end users on the call, the better—they'll become internal champions if they like what they see.

Decision makers and other non-end users might be less interested in the technical details and will want to understand pricing, privacy, and security.

SETTING THE STAGE

- Confirm current situation: "Is this still accurate?"
- Confirm desired outcome: "Is this still what you're looking for?"

Ask: "Is this all correct? Has anything changed since we last chatted?"

DEMO DELIVERY

Best practices:

- Go slow. When someone sees [Your product] for the first time, they can easily get overwhelmed. Pause frequently, speak clearly, and use your mouse to highlight and circle what you're discussing.
- Pause for questions. The demo should be paused at every stage to ask if the prospect has questions. Prompt them to ask more. By default, they'll say they have no questions, but if you encourage them to ask, it creates a slippery slope where they become more engaged in the demo.
- Build to commercials. The goal is to ensure no more product questions come up when you get into commercial discussions.

Prompts to get final questions:

- "So now that we're at the end of the demo, this would be a great time to ask any product or technical questions you have. Do you have any questions on how you'd use [Your product]?"
- "Does it all make sense from a technical perspective—what you need to do to integrate?"
- "Does it all make sense from a product perspective—what the user experience will be like?"
- "OK, so no more product or technical questions before we move on?"

PRICING

[Insert your pricing talk track]

WRAPPING UP

This section is relevant if the prospect says "they have to talk internally" or are punting a decision.

If you sense hesitation:

- **Call it out:** "I sense some hesitation around [insert perceived hesitation]. How are you feeling about it?"
- **Prod them:** "Do you see a case where you wouldn't move forward?"

[Handle the hesitation/objection]

If you're nearing the end of your time and still sense hesitation:

- Pricing hesitation example: "Would it be helpful to set up some time to walk you through the build vs. buy decision, and share why companies like [share what kinds of companies work with you] chose to use us instead of build in house?"
- Security hesitation example: "Would it be helpful to set up some time to walk you through our security posture, how we handle data, where our data is stored, and answer your other questions?"

Set up a check-in call: "Would you be open to me setting up a quick check-in call to answer any questions that come up after you chat internally? If you guys chat and you don't think it makes sense to move forward with us, that's not a problem and we can always cancel the call."

GOING FOR THE CLOSE

Ask: "Do you want to move forward with a trial?"

Don't say anything and sit in silence until they answer! This part might feel awkward, but you want to wait it out.

From here, there are two possible paths:

1. Handle objections they express according to the sections above, and set up a follow-up meeting
2. They say yes!

These frameworks were brought to you by Recall's Co-founder and COO Amanda Zhu. If you're interested in learning more GTM best practices and frameworks, [subscribe to Bessemer for more quick reads.](#)