

The Ultimate MSP Discovery Call Checklist

A discovery call has the power to set the tone for your MSP's relationship with prospective clients. Fortunately, through a customer-centered approach and a robust qualification process, you should be able to walk away understanding the full scope of your prospect's challenges and how your MSP can help solve them.

To identify your sales opportunity or definitely disqualify a prospect, it's important to ask the right probing questions. Don't forget to come prepared with an agenda of items that you want to cover, specific talking points and a desired outcome.

Tip: Use rating scales to rate prospective clients

A Good Discovery Call Answers:

- Is the client a good fit for your business?
- What are their IT challenges?
- What is their selection criteria?
- Who is the decision maker?

Questions to Understand the Company

- How did you hear about us?
- How many offices do you have and where are they located?
- What is your total number of employees?
- Can you give me an overview of your IT infrastructure?
(see adjacent chart)
- Do you have a technology refresh strategy?
- What mission-critical systems do you have and what is your backup strategy?
- Have you set up any backups?
- Can you access all of your systems with administrator privileges?
- In the past 12 months, how has your business changed?
- In the next 6 months, what are your biggest goals and the obstacles involved?

Based on Prospect's Answers, Check Mark Relevant Services

- Complete Managed Services
- Device & Endpoint Management
- Disaster recovery services
- Email, Domain or website hosting
- Hosted Storage and Backup
- Network Monitoring/Management
- Server Management
- Security (Security as a service and Risk Management)
- Software Management
- Virtual Desktop

Tip: Create a value gap by asking questions that differentiate you from the competition.

Questions to Address their IT Pain Point(s)

- What is your current IT solution? Do you work with an MSP, internal IT or co-managed IT?
- What's your typical strategy when it comes to resolving IT issues?
- Why are you dissatisfied with your current IT solution?
- What prompted you for wanting to make a change at this time?
- What are your most pressing concerns in terms of managing your technology?

Questions to Establish Where They are in the Buying Process

- What's going to happen if nothing is done to fix your IT problem(s)?
- When do you envision having a solution implemented?
- What do you look for in an ideal MSP partner?
- How do we compare to other solutions you're considering at the moment?
- Are you prepared and ready to move to a new IT solution?

Tip: a good discovery call should enable you to begin drafting a written sales plan and identify next steps. If this can't be done yet, schedule another call to iron out the details.

Questions to Identify Decision Makers & Budget

- What is your current IT spend?
- How much budget have you allocated for this project?
- Can you name anyone else in your company who wants this problem solved quickly?
- Can you walk me through your purchase decision process for contracted services?

You should walk away from a discovery call having identified specific next steps for yourself, such as:

- 1: Move to Tech Assessment (only if qualified)
- 2: Schedule a 2nd session (if more info is needed)
- 3: Schedule a followup 2 months (not urgent)
- 4: Ditch (sign up for marketing list)

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