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How to Run Discovery Calls in B2B: What First Meetings Actually Need to Achieve

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Key Points

- Most B2B deals don't lose at the close. They lose in the first meeting, when the wrong things get established early and false momentum takes hold.
- A discovery call that feels good but produces no buyer action isn't progress. Interest isn't a deal. The sales cycle starts when the buyer takes a meaningful action.
- Every first meeting needs to achieve three things: a point of view tested and agreed, the shape of the problem established, and a diarised next step with the right people in it.
- Rushing to demo, pricing, or proposal before establishing value gives the buyer no anchor to offset cost against. They go quiet because there is nothing to hold the deal open.
- Category creators face extra pressure to demo early because the product is hard to explain. The discipline required is exactly the same: slow down on the problem before you show the solution.
- If the buyer doesn't want to take a next step after your first meeting, something went wrong in one of those phases. That is the litmus test for whether the call worked.

Most people think they have a closing problem. When deals stall, go quiet or take too long, the assumption is that something went wrong near the end. In practice, the problem usually started much earlier. For 60 to 70 percent of the sales motions we work with, the issue is traceable back to the first meeting.

This article is about how to run discovery calls in a way that actually starts the sales cycle, beyond moving someone into a demo. The principles apply whether you are a founder selling your first five accounts, an AE carrying a full quota, or a sales leader watching your pipeline fill with deals that don't close.

What is a discovery call?

A discovery call is the first substantive conversation between a seller and a prospect. Its purpose isn't to explain your product. It's to establish whether there is a real problem worth solving, how much that problem costs the buyer, who needs to be involved in fixing it, and whether there is enough shared understanding to justify a next step.

Discovery isn't a stage you complete and move past. The work you do in that first meeting, specifically the point of view you establish and the problem you start to define, sets the anchor for every conversation that follows. Done well, it creates what you might call an echo chamber: each subsequent meeting reinforces the same core narrative, which becomes more specific and commercially grounded over time. Done badly, it creates false momentum. Deals look active in the CRM but have no real buyer commitment underneath them.

It takes close to 45 outbound activities to get a meaningful engagement from a cold prospect. It then takes around six more contacts to convert that engagement into a booked meeting. That meeting is the result of a significant amount of work. Wasting it by showing up unprepared is expensive.

Why first meetings fail to start the sales cycle

The most common version of a weak discovery call is one that feels good. The conversation flows, the prospect is engaged, they ask about pricing or a demo. You leave thinking it went well. But if you examine what actually happened, the elements that make a deal move forward are missing.

No problem has been established. You don't know the magnitude of what they are dealing with or whether it is a real priority. There is no path to the people who can actually make the decision. There is no clear reason for them to do anything now, and there is no agreed next step with any buyer commitment attached to it.

This is what false momentum looks like. The deal appears to be progressing because you have had a meeting and it felt positive. But the sales cycle hasn't started. The sales cycle starts when the buyer takes a meaningful action: correcting your point of view in a follow-up email, agreeing to bring another stakeholder into the next meeting, sharing internal information to help you size the problem. Until something like that happens, you have interest. Not a deal.

What a weak discovery call costs you

The most visible cost is a pipeline full of deals that won't close. If your first meetings are weak, the deals that follow look real but won't convert. It's possible to reach a position where the majority of your mid-stage pipeline needs to be re-qualified, often after months of demos, proposals, and follow-up emails that were never going to land.

The second cost is cycle length. False momentum extends the cycle artificially. The deal doesn't die quickly. It slows down, becomes vague, and eventually goes quiet. You send four follow-up emails and get nothing back. By that point it is very hard to recover, because the relationship was built on a product pitch rather than a business conversation and the prospect has nothing compelling to respond to.

The third cost is forecast accuracy. If your discovery calls aren't establishing buyer evidence, your pipeline is built on seller optimism. You can't forecast a deal you haven't properly qualified. The first meeting is where qualification begins, and qualification is what makes a forecast trustworthy.

What good looks like

A well-run discovery call achieves three things. First, it establishes and tests a point of view about the buyer's business. Second, it starts to define the problem in terms the buyer recognises. Third, it secures a diarised next step that involves the right people.

These aren't aspirational goals. They're the minimum standard for the sales cycle to have properly started. If you leave a first meeting without all three, you have had a conversation. You haven't begun a deal.

A strong first meeting also sets the right direction of travel. The goal isn't to reach demo, proposal, or pricing. The goal is to align on the buyer's purchasing process and build enough credibility and shared understanding that they want to keep the conversation going. Demo is a means to an end, not the end itself.

How to run a discovery call that creates momentum

There are five ingredients that make a first meeting work. Not all of them will be completed in every call, but they're what you are working towards.

Point of view. Before the meeting, do enough research to develop a hypothesis about the buyer's business. Not a pitch, a hypothesis. Something like: based on what we have seen in organisations like yours, we think you might be dealing with this. You test it on the call. If the buyer confirms it, you have a foundation. If they correct it, that correction is equally useful. Either way, you're starting a business conversation rather than a product demonstration. If you sell into organisations where you need to earn the right to ask questions, the point of view is how you earn it. You aren't showing up as a salesperson. You're showing up as someone who has thought about their business specifically.

Mutual agreement on the point of view. The goal isn't to be right. The goal is to reach a shared understanding of where the issue lies. If the buyer corrects your hypothesis, that correction is the start of real dialogue. You now have something specific to work with rather than a general interest in your product. That agreed point of view becomes the anchor for every subsequent conversation in the sales cycle. As more people encounter it, it gets stronger and more commercially grounded.

Starting the problem statement. You don't need to fully diagnose and quantify everything in the first meeting. What you need is to establish the shape and size of the problem so the buyer starts to see it in commercial terms. A useful test: when the buyer leaves the call, are they thinking about their problem differently? If the answer is yes, you have done something valuable. That is what earns the next meeting.

Initial value discussion. Before you get to demo, pricing, or proposal, you need a value conversation. Not a full ROI model, a starting point. Useful questions include: if you could fix this, what would that be worth to the business? How much does this currently cost you in time or revenue? What would change if this were resolved? The buyer may not know the answers, and you may need to offer benchmarks from your own experience. But having that conversation before showing price means the buyer has something to offset cost against. Without it, price is the only number in the room.

Right people and a diarised next step. The close of a first meeting isn't a vague agreement to speak again. It's a specific meeting, in the diary, with the right people in it. Ask who else in their organisation would need to be involved if this moved forward. If the point of view has landed and the value conversation has started, there is no reason for them to resist. If they do resist, something earlier in the call didn't land, and that is useful to know before you invest more time in the deal.

Common mistakes

Going straight to demo. When a product is complex or hard to categorise, the temptation is to use the demo to explain what you do. This puts the product in front of the buyer before they have any reason to care. They see features without context and can't evaluate whether what you are showing is relevant to their situation. Moving to demo early also signals that the relationship is transactional, which makes it easier for the buyer to go quiet later.

Sharing pricing before value is established. Pricing before value means the buyer has only one number to think about. They can't offset it against anything. The most common sequence that ends in deals going quiet is demo followed by price. The prospect sees both before they have understood what solving the problem is worth to them. When they go silent, it's rarely because the price is too high. It's because the value was never made concrete enough to justify it.

Running a pitch disguised as discovery. Twenty slides about your company, your investors, and your product roadmap isn't discovery. It's a presentation. Discovery requires the buyer to talk. If you're doing most of the talking in a first meeting, you're pitching. The goal is to understand their world well enough to frame your point of view in terms that are specific to them. You can't do that without listening.

Moving deals forward based on how the meeting felt. When a call feels positive, the instinct is to move the deal to the next CRM stage and treat it as progress. The discipline is to ask what the buyer actually did. Did they correct you, agree with you, offer information, or commit to a next step? Interest isn't a buyer action. Look for evidence, not feeling. A qualification framework like MEDDPICC helps here. It gives you a structure to check what you actually know about a deal versus what you are assuming.

How to tell if your discovery calls are working

The clearest signal is whether buyers want to take a next step without you chasing. If you have built a genuine point of view, established the problem in terms they recognise, and started a value conversation, there is no rational reason for a buyer to decline another meeting. If you're consistently struggling to get next steps booked during the call itself, something in one of those five ingredients isn't landing.

A second signal is whether the people in the room are changing. If your first meeting has gone well, the buyer should start thinking about who else needs to hear this. When they introduce a new stakeholder into the next meeting without being prompted, the first meeting worked.

A third signal is what happens to pipeline over time. Weak discovery calls fill the pipeline with slow, vague deals. Strong discovery calls produce fewer deals that are more certain. If your average cycle length is coming down and your win rate is improving, your first meetings are doing their job. If you have a lot of activity but deals are stalling at mid-stage, work backwards to the first meeting and examine what evidence was actually established there.

Further reading

How to Get a Meeting With the C-Suite What to do before the discovery call: how to earn access to the right person in the first place.

MEDDPICC Explained: A Practical Guide for Founders and Sales Leaders How to use a qualification framework to check what you actually know about a deal versus what you are assuming.

7 Steps to Win Buying Group Consensus and Cut Deal Slippage What to do once the first meeting has identified the stakeholders who need to be involved.

Win Rate Is the Cleanest Signal of Sales Health for a Start-Up Why improving discovery quality is one of the fastest routes to improving win rate.

Related terms

Discovery Call The first substantive sales conversation, where qualification begins and the sales cycle either starts properly or doesn't.

Champion The person inside a prospect organisation who advocates for your solution and helps you navigate the buying process.

Economic Buyer The person with the authority to release budget and make the final purchasing decision.

MEDDPICC A qualification framework that helps sellers establish what they actually know about a deal versus what they are assuming.

Mutual Action Plan A shared document that aligns seller and buyer on the steps needed to reach a decision, often agreed after a strong first meeting.

Sales Cycle The end-to-end process from first contact to closed deal. The first meeting is where it either starts properly or doesn't start at all.

Win Rate The percentage of qualified opportunities that close. One of the clearest indicators of whether discovery is working.

Related: First Meetings: How the First Sales Conversation Sets Every Deal That Follows, Five ingredients of a first meeting that creates momentum, The first meeting that feels good but proves nothing.

Related service: Strategic Sales Enablement
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