

A woman with long brown hair, wearing a black blazer, black leggings, and black pointed-toe pumps, is walking outdoors on a paved path. She is smiling and holding a white coffee cup with a black lid. The background shows a building with arches and palm trees.

5 Things You Should **NEVER** Say on a Discovery Call

*A quick guide for coaches,
consultants, & entrepreneurs*

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The dreaded Discovery Call. Those two little words strike so much fear in the heart of entrepreneurs, you'd think they'd have their own horror franchise by now.

You hate discovery calls because:

- You feel awkward, mechanical, and scripted
- You're horrified at the thought of asking for money
- You think it requires a used car salesman persona
- You're afraid to be seen as "selling"

But the biggest reason that you hate discovery calls is a lot simpler: Fear.

Fear that you're not enough, fear that you'll screw-up the call and never get your business off the ground, and biggest of all, fear that you don't know how to do this and worse—maybe you'll discover you're just no good.

Let me stop you right there: You actually do know how to do this because **you're having sales conversations all the time**. Sales is a language, and you are already more fluent than you think.

"Omg, you have to try this red lipstick!"

"You don't watch Game of Thrones? You would LOVE it!"

"This green juice recipe is AMAZING, I've already lost 5 pounds!"

You're not consciously trying to sell those products and services—you're just enthusiastic about sharing something helpful with a friend. And at the heart of it, that's all sales requires.

What I need you to do is get out of your head, drop into your heart, and have a conversation about what you do, why it gets you fired up, and how you can be of service to others.

Sales, at its heart, is about service, and the point of your initial call is to make a connection and see if you can help support each other. It's not unlike dating—you're feeling each other out to see if you're a match.

And just like dating, of course there are a few tried and true Do's and definite Don'ts! But, as I coach people in sales, I keep seeing far too many folks fall prey to the landscape of seriously awful advice out there (especially if you're new to sales or sales is not your thing). In fact, there is a whole industry designed around selling entrepreneurs a buzzword filled, one-size-fits-all system for closing. They leave you sounding stunted, stilted, inauthentic, awkward, and—let's just say it—like you googled some articles on closing sales.

There's a really easy litmus test for bad sales advice: If you wouldn't say it in real life, you shouldn't say it on a call. Sales is a language, not a lingo. It should create common ground, not exclude outsiders.

I've created this guide to help you cut through the din of inauthentic, insincere, jargon-heavy lingo that has unfortunately replaced (and polluted) what can be a really natural and engaging conversation.

WARNING: This guide may run counter to what your coaches are telling you. Listen to your gut and do what's right for YOU!

So let's scrap that script—and get to the heart of what you should be doing.

#1 THE “LET’S GET STARTED” MOMENT

You’re eager, and ok, a little nervous, to get on this call. And you want to make sure you make the most of your time while staying on track to close your client.

NEVER SAY: “I only have 20 minutes, so let’s really dive deep.”

I know why people do this: They’re attempting to set boundaries around time, raise the value of that time, and skip the small talk. Fine—we’re all busy. But while it may seem like a great way to manage expectations and respect everyone’s time, it sounds a little more like something Ron Burgundy would say, “I’m kind of a big deal. I have many leatherbound books and my apartment smells like rich mahogany.”

We get it...you’re busy and important.

In all seriousness, I know that people say this with the best of intentions. It comes from a place of respect and value—and a deep dread of having to cut someone off before you’ve had a chance to close. Time management is vital, make no mistake—but don’t make it about your time. Even if your time is limited.

DO THIS INSTEAD: Shift the focus

Think about making the most of their time, not yours! Tell them you know their time is valuable. That you wish you both had hours to really dig into this, but you promise to use their time wisely.

And look, I get it—you may truly only have 20 minutes before you have to jump to the next call. We’ve all been there.

Rather than treating your call like a race against the clock, approach it like the conductor of an orchestra:

*You control the tempo
of the conversation.*



#2 THE PROBLEM SOLVER MOMENT

So you've asked your client a few questions to get a sense of what she's trying to achieve, been an active and engaged listener, and in all sincerely want to know what's really in that person's way.

NEVER SAY: "So, what's stopping you?"

There's a reason this is a go-to for coaches trying to close: It seems like an easy jumping off point to "here's what I can offer you."

The problem is twofold—not only is the question not great, but it's often mishandled. This question can be a powerful tool once you've achieved emotional connection and trust. But, if your conversation doesn't have the right cadence, it can seem a little aggressive and puts the prospect on the defensive to explain why they haven't achieved what they're already painfully aware of having not achieved.

Think of it this way: If one of your girlfriends vented about how much she wished she could find the right guy, how do you think she'd respond if you said, "Well, Melina, so what's stopping you?" She'd be furious! Because A) That's lazy listening, and B) It's a very thinly veiled way of saying, "What's wrong with you?" Ouch.

Your client is here, talking to you, because they're probably not entirely sure why they're stuck! They may have an idea, but they're here because they can't get there on their own. Seeking help and services is an inherently vulnerable process for most of us.

You can't rush trust. I understand you're looking to bring the emotion out of them, but pushing someone into taking a leap will only make them more afraid of falling down.

DO THIS INSTEAD: Help them see it

Think of your client as the tour guide—and you're a tourist in their world. Ask thoughtful, specific questions that come organically out of what they've already shared. Then, once they've articulated their fears from a place of trust, you can ask the bigger questions:

"Linda, you've been saying you want to start your own business and you understand the steps. I get that there could be a lot of fear, that you're worried about having the resources to follow through. Share with me how I can help you take the leap."

Shouting "Swim!" from the safety of a boat is hardly inspiring—but if you offer them a lifeline, they'll open their hearts & connect.

#3 THE "WHAT DO YOU THINK?" MOMENT

There comes a point in the conversation, after you've shared what you can offer your prospect, that you want to find out, well, what they think about it. Of course! That will move the convo forward.

NEVER SAY: "What did you like about what I just shared?"

The problem with this line is that it's right out of the coaching sales 101 book—and it's tired, tired, tired. And, if we're being honest, it's patronizing. Because what you're doing is not so much leading them through a sales conversation as you are asking them to validate your pitch.


Don't put your client in the super-awk position of repeating back what you just said. A discovery call should be a conversation, not a presentation. I know that you're asking it in order to give the client some structure for feedback. You want to avoid the gut-wrenching awkward silence that can fill a call after you've made your pitch. But rather than getting your client to open up to you, this question keeps the conversation superficial. And the real reason you're asking the question is to probe deeper, not keep your client wading in the safety of the shallow end of the pool.

DO THIS INSTEAD: Start from a place of curiosity and empathy

Ask your client first and foremost about their needs, pains, hopes, and dreams. Out of everything your client touches upon, go deep on one thing and really map out the transformation your client will experience step by step. Tell them what will happen in each session, at each milestone, what changes they can expect—and why.

"Tell me how you see yourself after this program. What do you think would be possible if you pursued this?"

Help them visualize how they will feel after you've worked together so they can see the results. If you hold their vision high and lead them there—the value will be clear. A great close should lead the client to say yes to themselves, not you. You're not selling them on your value; you're empowering them to invest in their dream.



*What do you think
would be possible if
you pursued this?*

#4 THE DISCOUNT MOMENT

In your rush to close a deal, many a sales person has done a panic-induced price reduction, in which they, feeling a slight pushback or resistance around price, start a downward discount spiral.

NEVER SAY: “I think I could find something cheaper here...”

Here’s the deal: If the client is fighting you on price, but hasn’t ended the conversation with a “no, thank you, I’m going to pass,” or “Thanks, but this is not for me,” it isn’t over yet. An objection isn’t a no until it’s a no (and you could possibly get them on a follow up—but that’s a conversation for another time). The client is just confused or doesn’t have enough information to agree to your price. So, wait a minute, Queen Bey: Put down the bat and leave those set prices alone.

It’s possible that you’ve spent too much time selling the features (two calls a month, a Facebook group, etc) instead of the transformation. If Comcast wanted to sell you a better high speed internet package, they wouldn’t talk about how many bits per second you could upload video—they’d paint a picture of how much better your Netflix & Chill Fridays could be. Don’t get bogged down in the how in lieu of the why.

But if you try to morph your price down to fit your client, you’re doing your client a disservice. As you do more work for less than you deserve, you will gradually start to resent that client...and yourself. It can send you spiraling into self-doubt. Plus, as that resentment bubbles over, it will taint the relationship—possibly for good, cutting off a whole potential network.

Also, your customers will feel swindled if you don’t put up a fight! They’ll think you were trying to pull one over on them with your original price, and they won’t value your work as much.

DO THIS INSTEAD: Emphasize your program’s value & results

A lot of my clients are caught in a dangerous, false polarity. They believe sales calls are all about deceptively taking money from people’s hands—and they also believe that any service of value should be given away for free! It’s as if we think being paid what we deserve for our products and services somehow diminishes the purity of our intentions. But this is, quite frankly, nonsense.

The truth is, your clients value the services they pay for more highly. When they’ve invested some skin and capital in your services, their commitment is higher—and, by extension, so is their satisfaction.

Offer a payment plan. But remind them that this program is for people who are committed to their transformation. It delivers a high value, it demands a high level of commitment, and the price reflects that.

#5 THE MONEY MOMENT

In an effort to help the client say yes to the investment, it can be tempting to help manage their finances. This is a bad idea. And I'm not kidding in this example, nor am I making it up. But it should go without saying:

NEVER SAY: "Do you have anything you can sell?"

Yes, this really happened. In this case, the woman making the sale was trying to help the client find ways to afford her, and she really did suggest looking around her house for something she could hawk. #theworst

Do not needle around in someone else's finances to try and convince them that they have the ability to pay for your services.

It is not your business whether or not someone can afford you—it's your job to bring their vision to life and sell them on a transformation. If your potential client is motivated, they will do whatever it takes to find the money. It's not different than when you walk into a department store and lay your eyes on a pair of shoes that cost thousands of dollars...crazy? Oh, but those red soles!

*It's your job
to bring their
vision to life.*

Remember this: People pay for what they want and value. And if they can't or won't, that's their decision, not yours.

And, truthfully, it's also about owning and respecting your own value! Don't water your services down by offering to help people find the money to pay you. If your energy shifts to one of desperation, potential clients will pick up on that. The day you start helping orchestrate a garage sale for a cash poor client, you're in trouble.

DO THIS INSTEAD: Is it really about the money?

Depending on your level of comfort, this can be by far the most intimidating part of your sales conversation. But if you approach it authentically and empathetically (rather than just eagerly trying to close the sale), you will come away armed with a deeper understanding of your client's objections—and a better strategy for boosting your closing ratio.

Always be empathic towards their response. Set the tone that you understand where they are coming from and what it feels like to not be able to afford a service or program that can transform their life. Humanizing your conversation provides a sense of connection and gains their trust.

Asking the brave but necessary questions will get you to the heart of the objection. It could be that they feel confused about what they're getting, or are having trouble seeing themselves in the transformation you've painted for them. Objections are just an opportunity to continue the sale, you just have to keep asking the right questions. And sometimes, you may have to face the uncomfortable reality that it's not them, you didn't give them enough information to close the sale. And that's okay! If you ask the brave questions, you'll likely get to the heart of the matter and can address their concerns right then. Or, at the very least you'll walk away armed with what to do better next time.

SPEAKING OF NEXT TIME...

Follow up! Up to 50% of closing happens in the follow up, not the discovery call. Some people are quick decision-makers and are ready to say yes or no on the spot (and we love it when we get those clients). But the reality is that some people need time to take in your offer, analyze the situation, and formulate a response. If you're not following up after your first call, you miss out on a considerable percentage of potential clients who need that extra time. Even if it was initially a no, always reach out a second time to touch base and find out where they stand.

Never forget that you're feeling them out as much as they're feeling you out!

And if you've followed up and you're still not a fit—that's okay! Just because you're not the right fit doesn't mean you can't refer them to the right person. We've all been on that date where we've said, "You're so wrong for me...but you should be dating my best friend!"

By putting their transformation first, you affirm to them and to yourself that you're operating from a place of generosity, authenticity, and abundance—not scarcity. The point of every call is connection, then closing. If you put the client's needs before the close, you leave a lasting positive impression—and they're that much more likely to refer you to clients who would be a perfect fit.

If you always make connection your goal, every call is a win-win.

Your Moment

There is no one type of salesperson or one right way to close. Sure, there are formulas and guides out there (like this one) but at the end of the day, any resource, guide, or coach should be helping you do what works for YOU and your business—not serve as a reflection of what they do. You are not anyone's Mini-Me. Beware of those who try to convince you otherwise.

What makes sales so fun, when it really starts clicking, is that you get to be YOU. No persona, no games—just you, offering your services to the person in front of you. Connection is what makes us human. We're wired to do it. Sales is simply the practice of connection—and the more you practice, the better you'll get.

With time and practice, that fear that you're not enough or that there's a scarcity of business will start to dissipate. You'll feel confident in connecting with the right clients—and you won't be afraid to let the wrong clients go. There's a sense in sales that you're supposed to be closing everyone all the time, that we should be all things to all people in order to make it—and that's simply not true, and it's certainly not realistic.

As someone who has been selling for 20 years, I can say from experience that not everyone will be a fit for you—and if they are, that probably means you're watering yourself down! When you're a super passionate person who wants to make a difference, you have to get specific about your mission, and that mission won't (and shouldn't) be for everyone.

Always stay engaged in your mission, rather than getting attached to the sale. Don't be afraid to let go of what doesn't serve you and your business. Be yourself, listen to your gut, stand firm in the power of your vulnerability and empathy, believe in your business—and the money will follow.

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"I ONLY HAVE 20 MINUTES, SO LET'S REALLY DIVE DEEP."

"SO, WHAT'S STOPPING YOU?"

"WHAT DID YOU LIKE ABOUT WHAT I JUST SHARED?"

"I THINK I COULD FIND SOMETHING CHEAPER HERE..."

"DO YOU HAVE ANYTHING YOU CAN SELL?"

About the Author

Julia Andrews is the creator of Connect 2 Close™, a sales method which teaches women how to speak the language of sales through connection. As a sales coach and strategy consultant, Julia's work is centered around empowering women business owners to break through the limitations of traditional thinking about returns and expectations to achieve next-level results.

Julia leverages her decades-long insight as a top-tier performer in corporate financial services, asset protection, insurance and direct sales to help women realize their potential and achieve the success they envision for themselves. As a wholesaler at OneAmerica Financial Partners, Julia received the coveted award of Internal Sales Partner of the Year for two years in a row (2013 & 2014). Over the course of six years, she and her partners generated over \$200 million in insurance sales.



Her extensive background in finance & sales, featuring tenures at Merrill Lynch, Downey Savings & Loan, and Wescom Financial Services, makes her uniquely suited to the needs of entrepreneurs and consultants. Her fluency in Spanish and English allows her to connect more broadly to a cross-cultural clientele. At Merrill Lynch, Julia exclusively served the Spanish-speaking community throughout Latin America. At both Downey Savings & Loans and Wescom Financial Services, Julia expanded her reach to the diverse audience of the greater San Diego & Los Angeles area marketplaces.

Julia's work includes private client coaching and sale delivery, as well as personal and corporate consulting, with an emphasis on empowering women in sales.

