| ***Guides:*** *What follows is a slew of possible questions you can ask to get the answers you need. Many of the questions are redundant. DO NOT ask your client every question. That would be a* disaster*. Instead, use the questions as a reference during your conversation. Or highlight ahead of time the ones you want to ask. Or select from these for your pre-call questionnaire. Some questions will be a better fit for your communication style or your client’s situation.*  *If you have questions you’d like me to add, email* [*becky@guidemktg.com*](mailto:becky@guidemktg.com) *or DM me on Slack.* |
| --- |

# DISCOVERY CALL

Creating Your Potential Client’s Brandscript

Thanks so much for booking this conversation. I’m excited to get to know more about your business and what goals you’re trying to achieve with your marketing.

Here’s how we’ll spend our time:

1. First, I’ll ask some questions to get to know what your business is all about. I’m going to record this call so I don’t have to be distracted by lots of note taking. I want to give you my full attention.
2. Once I understand your business, we’ll chat about the problems you’re dealing with and how they’re affecting your business.
3. We’ll close by discussing what we need to do to resolve those issues and help you reach your goals. If we think we’re going to be a good fit, then I’ll send you a proposal.5

Those are my three objectives for this call. Is there one thing that you want to be sure that we cover? … OK. I”ll make sure we talk a bit about that before we’re done/we’ll cover that when we talk about...

Great. Let’s dive in. 9

#### Their Business

* What do you do? 5  [You’re listening to see if they have a one-liner. If they don’t, you can use this as evidence later for why they need one.]
* How did the company get started (if owner/operator: why did you get start doing this?) 18 [You’re listening for the philosophical problem]
* What pisses you off 13/ makes you angry? [listen for the philosophical problem]
* What breaks your heart? 13 [listen for the philosophical problem]
* In a brief sentence, what is the dominant problem your company solves? 5
* What is the big problem you solve? 13
* How do you serve your clients/customers/members? 5
* What is your lead-in product or service? 5
* What makes you different? 19
* Who do you sell to (dominant personas)? 16
* What do happy customers say you did for them? 5
* What have your best/ideal clients said about you? 16 [You’re listening for character, problem, success and failure in this answer.]
* Where do your leads come from?
* How are you reaching out to your ideal customer?
* How many (or what percent of those) leads do you get each month/week? 5
* How many of those leads are you converting into customers? 5
* How many customers do you serve each year? Each month? 14
* How do people buy from you? Walk me through the sales process. 16
* What are your dominant revenue streams? 5
* Which stream sells the most? 5
* What is your most profitable revenue stream? 5
* Tell me about your business’ top-line revenue? 7
* How does that compare to the year before?
* How many employees do you have? Will that change in the next 12 months? 14
* Are there other key metrics that you track? 15

#### 

#### The Future

* Imagine the world 3 years from now… Everything you have planned (or dreamed of) for your business has been successful… What’s different about your business in 3 years? 14
* What would have to happen to make that be a reality? 14
* What current barriers do you foresee in reaching your 3-year goals? 14

#### 

#### The Trigger

*This may be a missed target, slowed growth, an upcoming corporate event, an ambitious sales goal, an ultimatum from leadership/stakeholders, etc.*

* What pushed you to reach out to me?
* Did an event, or a culmination of events, bring this need to life?
* What was it that created enough momentum for you to reach out to me?
* I’m curious, is there a particular reason you reached out to me specifically? 5

#### The Problem

* If I could wave a magic wand and do one thing for you, what do you need help with? 20
* What are you having trouble figuring out right now? 20
* What’s the biggest challenge you face with your marketing or messaging? 5
* How is that affecting you and your business? 5
* Have you tried to solve this problem before?
* Tell me about a recent marketing campaign that didn’t work. What happened and what didn’t work.16
* Why are you willing to spend money to solve this?

#### 

#### What Is This Problem Costing You (aka “Your Budget”)?

*These questions will help you get a sense of whether they can afford you and how to price your services* above *the SB minimums.*

* What’s the historical cost, either in opportunity or actual figures, that this problem has caused?
* Left unfixed, what long-term costs are associated with the problem?
* Left unfixed, how does this prevent your company from growing?
* What is your budget for solving the problem and avoiding these real and opportunity costs?5
* “What are you expecting to spend on this?” 16
* “Tell me what you planned to spend for this work.” 16
* “What range comes to mind?” 16

I understand how frustrating this can be. In fact, most of the clients I’ve worked with have come to me with that same issue [or one similar].

My job is to help leaders like you identify the root cause of those issues. Then we use messaging and marketing to resolve them.

I want to see your business grow. We only want to work on projects where we can deliver a return on investment. That’s why we don’t suggest solutions that we can’t deliver. If I believe that you need a solution that we don’t offer, I’ll say so.

The good news is that it sounds like I can definitely help you resolve some/many/most/all of those problems and get your business back on track/to the next level. 9

I’d love to talk through a few ways we can use messaging and marketing that helps you achieve your goals.

#### Their Envisioned Solution (if they haven’t already described this)

Before I outline the solutions that I *know* will make a difference for you, I’m curious to know if you have a solution in mind. Let’s briefly talk about that.

* What do *you* think you need help with? 6
* Did you have a particular project in mind to solve the problem? 5
* What timeline did you have in mind to accomplish these things? 5
* Do you have any SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals that this project is critical to meeting? 5
* If this was our last time ever speaking, what else do you really want me to know? 19

#### StoryBrand Solution

What you described is….

Here’s what I know from helping customers like you: the biggest thing that’s holding them back is not having a clear message. If we make your messaging really clear about the problem you solve for your customers, they will buy your solution. You’re going to win in the marketplace.

Donald Miller, founder of StoryBrand, reminds us that “People do not buy the best products and services. They buy the ones that are communicated the clearest — the ones they can understand the fastest.”

Any solution we create needs to use a cohesive brand message. We’ll apply that to your marketing collateral so that more of your customers respond. Then, depending on what deliverables we determine are necessary, I’ll either revise your existing content or create new marketing tools using the clear message we created together. 9

#### 

#### Clear Messaging

* Does your company have a clear and compelling brand story? 9
* Do you feel like you’re connecting with customers well when you describe what you do?
* Can customers accurately describe your product or service?
* What key benefits are customers not fully aware of?

*Pitch a BrandScript/Clarified Company Message session. Use StoryBrand testimonials to show how other companies have clarified their messaging and increased their revenue.*9

#### Website

* Is your website working? 9
* Are you seeing a response from people who consume your website content? 9

*Pitch a Website wireframe. Use SB testimonials to show how businesses who’ve changed their website based on the BrandScript have seen an increase in business.*9

#### Lead Generator

* Do you currently have a way to capture new leads? 9

*If no, explain what a lead generator is and how it can grow their business. “One area where most businesses have a ton of opportunity is with their lead generator. We call it a transitional call to action and it helps you gather highly qualified leads and onramp them to your services. Some businesses have tripled and quadrupled by simply including a lead generator on their website.”* 9

#### Email Campaigns

* Are you on-ramping new leads with a series of automated emails? 9

*If no, explain the power of an automated email sequence and how it can act as a constant salesforce for their business.* 9

#### 

#### Sales Letter

* Are your sales letters/pitches closing deals? 9

*If no, explain the framework you’ll use to craft powerful sales letter/pitch that is impossible to ignore.*9

These are the elements of an effective sales funnel that will attract new customers and convert them into paying clients. If we execute this together, your business will transform.

Based on the issue you described earlier, the best place to start would be (identify the best next step). By starting there, you’ll start to notice a significant difference in how customers respond to what you’re saying. Your messaging will be clear and people will quickly understand what you offer and how it will make their life better. This will lead to more sales and your business will grow.9

#### 

#### Success

* When we solve your problem and it’s no longer an issue for you, what would the next few months look like for you and your business?

I know we can work together to help your organization reach its goals.

Based on our discussion today, there are several items we can implement right away that will increase engagement and help grow your business. Do you agree?

Great, I think so, too. I’ll draft up a proposal that outlines the deliverables I’ll provide.

Once you sign the proposal, we’ll get started with a Kick-off Call where we’ll finalize our plan and make sure everyone is on the same page.

Then we’ll dive right in and create a clear message that we’ll use for every piece of content and marketing we create moving forward.

Does that sound good?9

#### 

#### If Yes

Awesome. Here’s what will happen next: 5

1. I’ll draft up the proposal and include the deliverables we talked through today. I’ll have it to you by [date].
2. You’ll review it, return a signed copy of it back to me, and pay \_\_% of the invoice.
3. We’ll schedule a kick-off call and officially get this project underway! [Between now and that call, I may send you a form with some additional questions. Answering those will help us use our time well.5]

Should you have any questions in the meantime, please don’t hesitate to reach out. I look forward to working with you! 9

#### If No

Okay. As you take time to make a decision, I’d love to send you a copy of [this lead generator] that I think will give you a better understanding of [focus of your lead gen]. Are you OK with me sending that along now then following up with you next week?

Great, I’ll speak with you then. Have a great day!9

BRANDSCRIPT CALL #1

*Before you start this call, read through or re-watch the Discovery Call so you know which of the questions below you want/need to ask and which ones you already know the answer to. You may choose to ask some of the same questions again if you didn’t get good clarity during Discovery or if you want to drive home their inability to speak clearly about their business.*

Thanks so much for taking the next step with us. I’m looking forward to digging in deeper so we can build marketing that creates more business and helps you reach your goals. [Include something specific about their goal that you learned in your Discovery Call.]

We have three, 90-minute calls in front of us. Much like the Discovery Call, I’m going to ask a series of questions. I’m going to record this call so I don’t have to be distracted by lots of note-taking. I want to give you my full attention.

This is the first call, and here’s how we’ll spend our time today:

We’ll start with some business and business strategy questions. Marketing should help you hit a specific goal. I’m going to ask about those goals and their financial implications.

Then, we’re going to work on creating a clear message. There are 7 parts to a clear message. Today, we’re going to focus on the first 3. We’re going to identify who your customer is, who they want to be, and what their problems are.

Today’s call will probably feel the most challenging of the three. Because you know your business so well, you have what’s called “the curse of knowledge.” It means you’re an expert, and it’s easy to forget that your customer isn’t. There may be some times that I push you to talk a bit more about something. It might feel a little awkward, but I promise it’s important. Sometimes the information we need to really make a difference is beyond the first answer. This is typical of every client we’ve worked with.

You may also wonder why we’re talking so much about your customer and not as much about your product. This is an important paradigm shift in thinking about what role you serve in your customer’s story. As we work through the questions, I’ll explain a bit about who the hero of this story really is.

On our second call, we’ll go through the remaining 4 parts of a clear message: the role you play, the plan customers follow to do business with you, how you call a customer to action, and what success and failure looks like for your customers.

On our final call, I’ll go over your completed clear message so you understand what it is. I’ll also show you how you can use it across all of your business to create clarity, which creates growth. I’ll also come to that meeting with a strategy — a prioritized list of what you should work on next to execute get your marketing back on track. 7

Those are my three objectives for the calls. Is there one thing that you want to be sure we cover? … OK. I’ll make sure we talk about that before we’re done/we’ll cover that when we talk about...

Great. Let’s dive in with some questions about your marketing and business strategy. 9

## MESSAGING AND MARKETING QUESTIONS

* Tell me again, in three clear sentences or less, what you do.11 [You’re listening to see if they have a one-liner.]
* Have you clearly identified the problems you are helping your customer solve? 11
* What will your customer’s life look like if they buy your product or service? 11
* Describe your ideal customer. 16
* If your ideal customer isn’t getting their needs met through you, where are they going?
* Who is your competitor? What other company provides a similar product or service?
* What spaces (physical and digital) do your customers gather?
* Do you have an elevator pitch that is clear, engaging, and easy to understand? 11
* Is the message your company is telling clear and compelling? 11
* How do your customers hear about you?
* Does your website include the following items? 11
  + A clear and concise statement of what you offer
  + Images that communicate what success looks like for your customer
  + The specific value you deliver to your customer as a result of using your product/service
  + Direct call to action that is the obvious button to press
  + A plan that shows your customers how to do business with you
  + A transitional call to action or lead-generating PDF
  + Bite-size breakdowns of your products or services
* Do you have a way that you’re capturing email addresses — like a lead-generating PDF or other downloadable assets? 11
* Do you have an automated process, like an email campaign, that on-ramps your customers to your product or service or upsells them to other products/services? 11
* Have you written a sales script that is converting prospects into customers? 11
* Have you collected and displayed stories of customer transformation? 11
* Please send me 3–5 recent customer reviews that you think best represent your company 16 and how it impacts your customer’s lives.

## BUSINESS STRATEGY QUESTIONS

* What are your dominant revenue streams?
* Tell me about your business’s top-line revenue? 7
* What are your revenue goals? (Ex: $1 million) 7
* What is stopping you from hitting that goal? 7
* How many clients do you need to hit that goal? (Ex: 5) 7
* How many leads are you getting per month/week right now? 5
* Where are those leads coming from? What marketing channels are you actively using? (Website, lead generator, direct sales, trade show, physical advertising, digital advertising)?
* How many people do you need to talk to in order to get the number you need? How many leads does it typically require to convert someone to a customer? (Ex: 1,000) 7
  + Ex: So if I can put together something that gets 1,000 people in front of you, you can turn them into the 5 you need and get your $1 million? 7
  + Ex: I’m going to charge you $200,000 for that and you’re going to make $1 million off of that. Does that work? 7
* What does an average customer spend with you over their lifetime (Customer Lifetime Value)? 5

## BRANDSCRIPT QUESTIONS

### IDENTITY TRANSFORMATION

*Mistakes: They have listed a “thing,” not an actual identity. It’s too vague.*

#### FROM

* How was your customer feeling about themselves before they used your product or service? 1
* What do they have? 5
* What are they feeling? 5
* What’s an average day like? 5
* What is their status? 5

#### 

#### TO

*Mistake: Don’t confuse this with items that belong in the success bucket*

* Who will your customer become after they use your product or service? 1
* What is their aspirational identity? 1
* Describe the type of person who experiences success as a result of using your product or service? 2
* Who are you helping your customer become? 3
* Who does your customer want to become? 4
* What do happy customers say about what you did for them? 5
* If your customers were talking to a friend, how would they describe their “before and after”? 5
* What do they have? 5
* What are they feeling? 5
* What’s an average day like? 5
* What is their status? 5

### 

### CHARACTER

*Mistakes: Listing too many things. Being too vague.*

* Who is your customer?
* What does your customer want? 1
* What’s keeping them up at night?
* It’s not likely that your customer wakes up in the morning saying that they want [your end product]. What is it that they wake up wanting?
* When they sit down at their computer and try to solve their problem, what are the words they use to search? What phrases are your customers Googling? 12
* Why do prospects seek you out?
* What is it your customer is looking for when they go “shopping” for a product or service like yours? 2
* In what other ways are your customers doing or trying to get what they want?
* What do they want as it relates to what you offer? 2

### 

### WITH A PROBLEM

#### EXTERNAL PROBLEM

*Mistakes: The external problem is a need, not an actual problem.*

* What is the physical, tangible thing that is getting in the way? 2
* What’s a problem your customers deal with as it relates to your product or service? 1
* What words do your customers use when they complain (about the problem you solve)?18
* What would someone search for if they need to hire/buy from you? 16
* When they sit down at their computer and try to solve their problem, what are the words/phrases they Google? 17
* What SEO keyword do you want to rank for? 18 [You may want to *think* about this question but not ask it lest you end up spending a lot of time talking about SEO.]
* What problem do you want to be known for solving? 3

#### INTERNAL PROBLEM

*Mistakes: The internal problem is not a feeling. Not connecting the external & internal problems.*

* How is that making your customer feel? 1, 2

#### 

#### PHILOSOPHICAL PROBLEM

There’s a robust Slack conversation about this [right here](https://storybrandcertified.slack.com/archives/C018WD5HPB4/p1709834997542849).

*Mistakes: The philosophical problem is irrelevant.*

* Why is it “just plain wrong” for your customers to be burdened by this problem? 1
* Why is that (that = internal problem) just plain wrong? 2
* How did the business get started (if owner/operator: why did you start this business?) 18
* What’s the good news your customers aren’t yet aware of?
* Ask the founder: What breaks your heart?13 What pisses you off?13

BRANDSCRIPT CALL #2

This is the second call, and we’re going to continue working on creating a clear message.

There are 7 parts to a clear message. In our first call, we focused on the first 3 parts: who your customer is, who they want to be, and what their problems are.

Today, we’ll go through the remaining 4 parts: the role you play, the plan customers follow to do business with you, how you call a customer to action, and what success and failure looks like for your customers.

On our final call, I’ll go over your completed clear message so you understand what it is. I’ll also show you how you can use it across all of your business to create clarity, which creates growth. I’ll come to this meeting with a strategy and prioritized list of what you should work on next to get your marketing back on track.7 If we think we’re going to be a good fit, then I’ll send you a proposal.5

Is there one thing that you want to be sure that we cover today? … OK. I’ll make sure we talk a bit about that before we’re done/we’ll cover that when we talk about...

Great. Let’s spend a few minutes reviewing what I heard from our previous call. We’ll want to start with a shared understanding of who your customer is and what problem they face. Then we’ll dive into how you solve it.

<recap of Call #1>

### 

### GUIDE

#### EMPATHY

*Mistakes: Not connecting empathy to the problem.*

* What is the strongest pain point the character deals with and how does your company come alongside them to help them overcome it? 2
* Have you experienced something like this? 21
* When you put yourself in their shoes what do you *feel*? 21
* “We understand what it’s like to + [internal problem].” 2
* “We know how hard it is to deal with X” 3
* “Many of our customers have struggled with…” 3
* “Don’t you just hate it when…” 3
* “We understand how it feels to…” 3
* “Like you, we are troubled by X” 3

#### 

#### AUTHORITY

*Do this carefully, because too much authority pushes you into the role of the hero.*

*Mistakes: Including elements of authority that are irrelevant and don’t contribute to the customer’s success.*

* What are the things that equip you as the most trustworthy company to solve your customer’s problem? 2
* Statistics 3 “We've helped \_\_ people in your situation.” “We’ve helped people in your situation save \_\_ a year”
* Other business logos 3
* Media badges 3
* Testimonies (specifically about how you helped them succeed) 3
* Do you have a personal story of transformation that demonstrates your authority (Dave Ramsey example)? 3

### 

### PLAN

*Mistakes: Using inside language. Overcomplicating the plan or including too many (more than 4) steps. Failing to use benefit-focused language in the description of each step.*

* What steps does your customer need to take to engage your brand and experience success? 2
* **Process Plan:** Are there 3 or 4 steps your customers can take that would lead them to a sale?1
* Are there 3 or 4 steps that would explain how they would use your product after the sale? 1
* **Value Plan:** Are there 3 or 4 steps that describe how you do it differently from others? 10
* If the process that customers go through to work with you is long, can you break it down into phases? 2
* **Agreement Plan:** Do you have “The [Company Name] Guarantee” or “The [Company Name] Promise”? 18
* What assurance can you give your customers that will help them relax and resond to your CTA? 18

### 

### CALL TO ACTION

#### DIRECT

*Mistakes: The direct call to action is passive or vague.*

* What action does your customer need to take to get to the point of sale? What is your version of “buy now?” 2

#### 

#### TRANSITIONAL

*Mistakes: This is not something of value. It doesn't have an interesting title.*

* What is your version of “can we go out again?” 2

### SUCCESS

*Mistakes: Making success about the brand, not the customer. Over promising.*

*List: at least 4 short-term and 2 long-term successes* 10

* What does your customer’s life look like as a result of using your product or service? 1 2
* What positive results will someone experience if they use your product or service? 1 2
* Where can you take your customer? 3
* *Because* you’re [short-term success] you can focus on [long-term success]. 10

### 

### FAILURE

*Mistakes: Going too negative (often by listing a long-term failure). Not listing any failure. Not having one that directly ties back to the customer’s internal problem.*

*List: only short-term failures, unless your product or service really is life saving* 10

* List the negative consequences your customer will experience if they don’t use your product or service.1
* What pain are you helping customers avoid? 2
* What thing(s) might happen if they don’t buy your product? 2
* How will their problems worsen if they don’t move forward with your brand? 2

### [closing script]

BRANDSCRIPT CALL #3

[go over their BrandScript Script, one liner and examples]

### WRAP UP + UPSELL

* Have these calls help you gain confidence in your messaging? 2
* Do you feel like you would have been able to do that on your own? 2
* Let’s talk through a few ways to implement this clear message into your marketing. 2
* Do you see why your Website isn’t working? Let’s look at a few examples of sites that are presenting a clear message. *(pull from SB Website example doc)*
* Do you think you’d see an increase in business if we implemented these words and ideas into your website? 2
* Are you ready to solve this now?
  + Do you have a way to capture the email addresses of visitors to your site? 2 *(you should know the answer to this from your Discovery Call)*
  + Are you currently doing any sort of email marketing campaign? 2 *(you should know the answer to this from your Discovery Call)*
* Do you think you’d see an increase in business if we implemented these words and ideas into an email campaign designed to convert leads into customers? 2

[insert sales copy about proposal and next step]

OVERCOMING OBJECTIONS

* What about this is important to you? 5
* How can I help to make this better for us? 5
* How would you like me to proceed? 5
* What is it that brought us into this situation? 5
* How can we solve this problem? 5
* What’s the objective? / What are we trying to accomplish here? 5
* How am I supposed to do that? 5
* What caused you to do that? 5
* How does this look to you? 5
* How does this sound to you? 5
* What about this works for you? 5

ENDNOTES

1  BrandScript Sheet

2 [How to Conduct a Brandscript Consultation](https://cym-assets.s3.amazonaws.com/downloads/732/dHLOlAjdVsxJc5pxdsLFIsdh2rTICqGWsJpE73f3.pdf)

3 Intro video clips embedded in BrandScript at mystorybrand.com

4  <https://admin.clarifyyourmessage.com/resources/852>

5 Nathan David Hall

6 Brennan Dunn [DoubleYourFreelancing.com](http://doubleyourfreelancing.com)

7 *Nathan Riches* [*Building a Better Product Lineup*](https://admin.clarifyyourmessage.com/resources/1202) *(SB Guide 2019 Retreat Presentation)*

8 Paige Worthy

9[Sales Flow Process](https://cym-assets.s3.amazonaws.com/downloads/552/W8cleeyeBZEAwxqGnv9oINAXMLOjIi5Mpa8lK3Km.pdf)

10<https://admin.clarifyyourmessage.com/resources/1182> Sales Funnel Training Updates with Dr. JJ Peterson

11<https://storybrand.com/downloads/guide-resources/Sample-Marketing-Assessment.pdf>

12Alex Schauer

13 Russ Stalters

14 Josh Brammer [Client Name, Project Kickoff Questions](https://docs.google.com/document/d/1kcBaqX6DOHhamSsHX_RNHazxDzBSb1Byis7oHCK2gSo/edit)

15 Susan Payton  
<https://storybrandcertified.slack.com/files/UR874CA58/F011FGU5FSM/getting_client_testimonials.mp4>

16 Wes Gay: BrandScript Checklist.pdf

17Chris Schull, [Messaging Guide Discussion Questions](https://docs.google.com/document/d/1RyyHlqQwBAmHR8pkJq303XISAQC4EY8czamIFMdn9dg/)

18 Alex Shauer & Eric Upton, Building Better BrandScripts Roundtable

19 Jessie Congleton

20 One Hour Content Plan

21 Katie Lantukh

New questions to add (from SB Guide Training on 9/26/20)

* What problems are you hearing from customers?
* When you hear customers who love your service, what do they say to you?
* What problem do your customers come to you most with?
* What type of people come into your store?
* Can you tell us a success story from someone who’s really loved your product?
* How do I actually use your product?
* When people are comparing your product to other similar ones, why should they choose yours?
* Have you won any awards or have any ratings?
* How can this product grow with customers over time?
* How do people buy from you?
* What questions should people be asking to make sure they’re buying the right/best product for them?
* What successes can people expect if they buy from you and failures if they don’t? What happens if people use your product?
* Do you offer any kind of warranty/guarantee?