

*Qualification and Discovery eBook*

# KNOW WHAT TO ASK WHEN

*A guide to creating your solution to meet customers'  
needs*



CORS PRODUCTIVITY SOLUTIONS, INC.

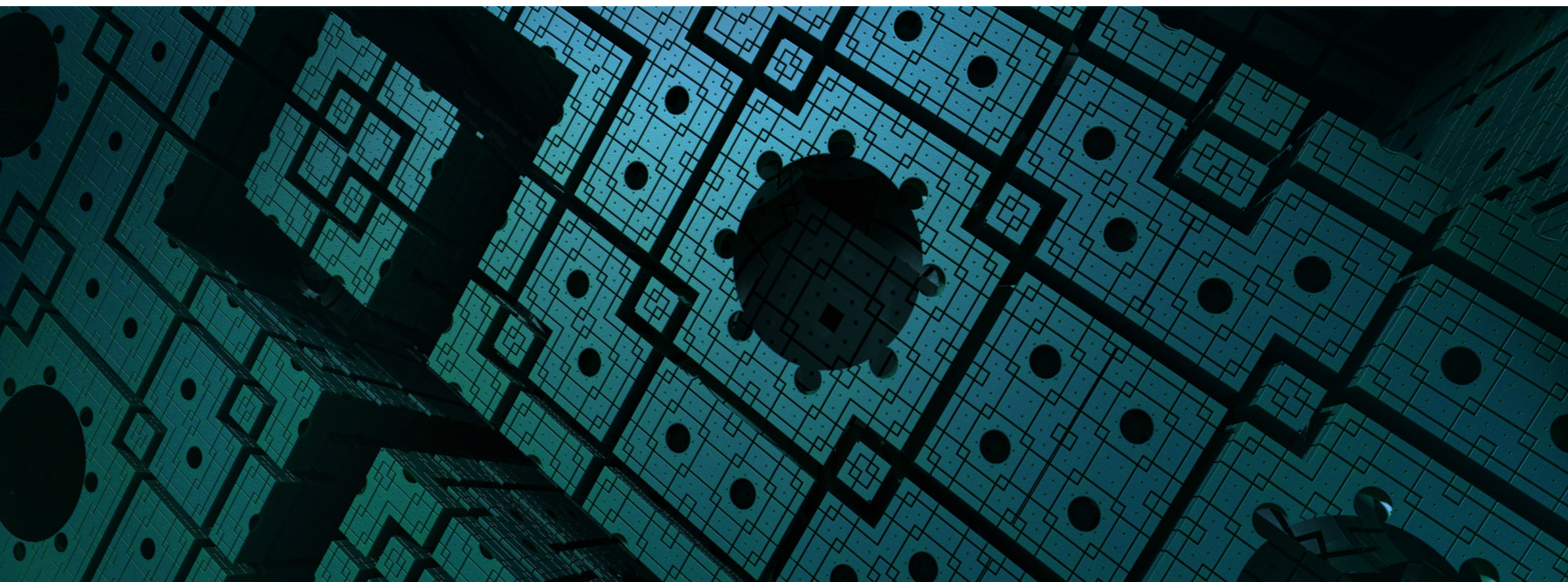




# A GUIDE TO QUALIFICATION AND DISCOVERY

This guide is designed with questions that, when answered, help form not only the executive summary but echoes your findings, insights, and best practices via your recommendations. By asking these and other questions you:

- Lay the foundation for a long-term relationship
- Have the blueprints for architecting the right solution based on customer insight
- Gain a competitive advantage; active listening allows you to focus on deeper areas of pain that others can miss
- Demonstrate your skillset by tying solutions back to pains and objectives

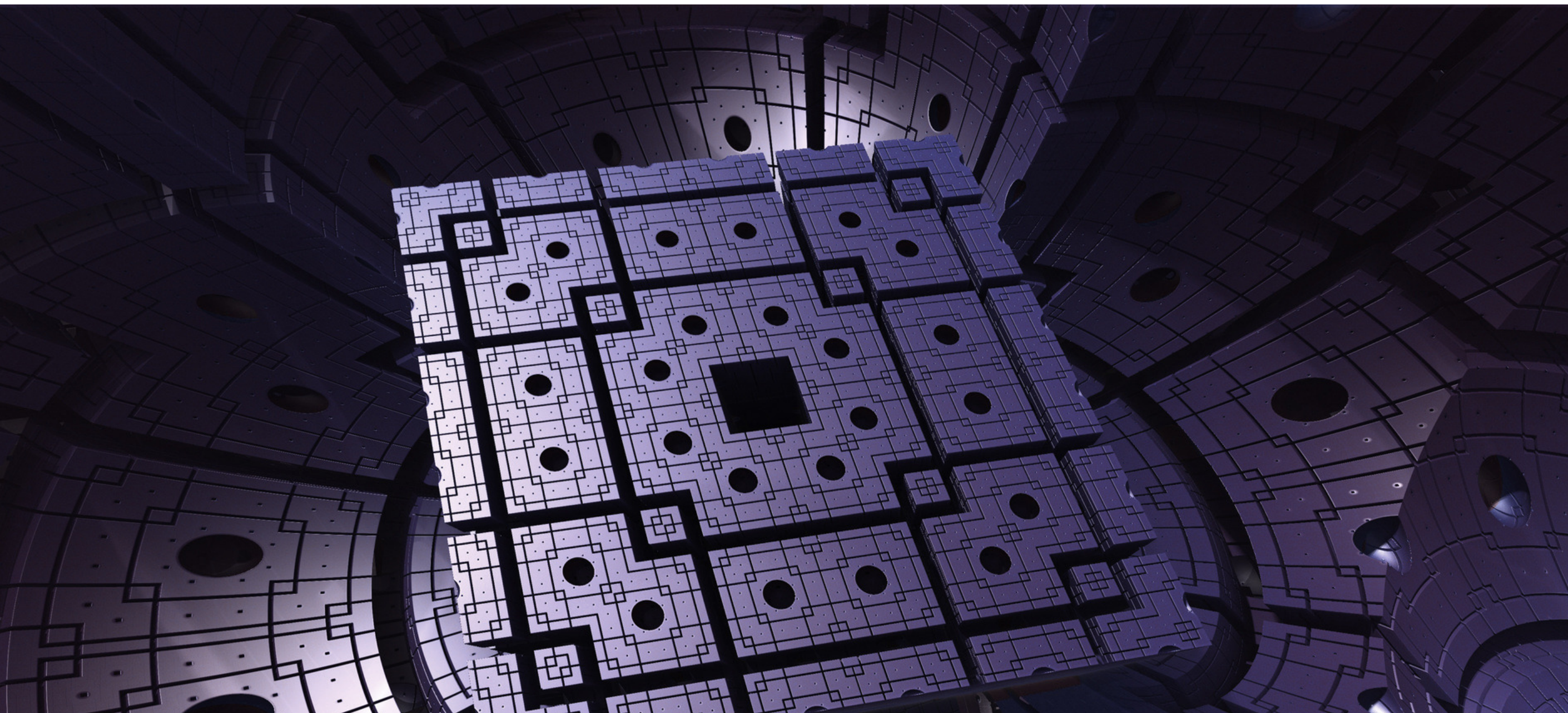




# COMPANY BACKGROUND

Sure you can read about a company on its website or LinkedIn profile. But isn't it better to really get to know the company personally? Ask questions like the ones below to start the conversation. Don't forget to ask "Why?" or "How?".

- How many employees are there?
- How are your employees dispersed? Are they in multiple offices?
- Do any employees work from home? Are they on the road?
- How old is the company?
- What are the roots of the company?





# AREAS OF PAIN

Everyone has areas of pain – that's why you're there. You must uncover both the obvious pain points and take a deeper dive. Your goal is to recommend solutions to the real problems - not just the symptoms. Challenge your customer to think about areas of pain they haven't previously considered as a pain or have just gotten used to as "that's just the way it is."

- What challenges are you trying to solve?
- Have you tried to solve the problem in the past? If so, how?
- What led you to want to make a change now? Who instigated the need for this change (e.g. users, upper management, IT, etc.)?
- What communication system is currently in place? On-premises vs. cloud-hosted?
- How old is your current system?
- How are your offices and employees currently connected?



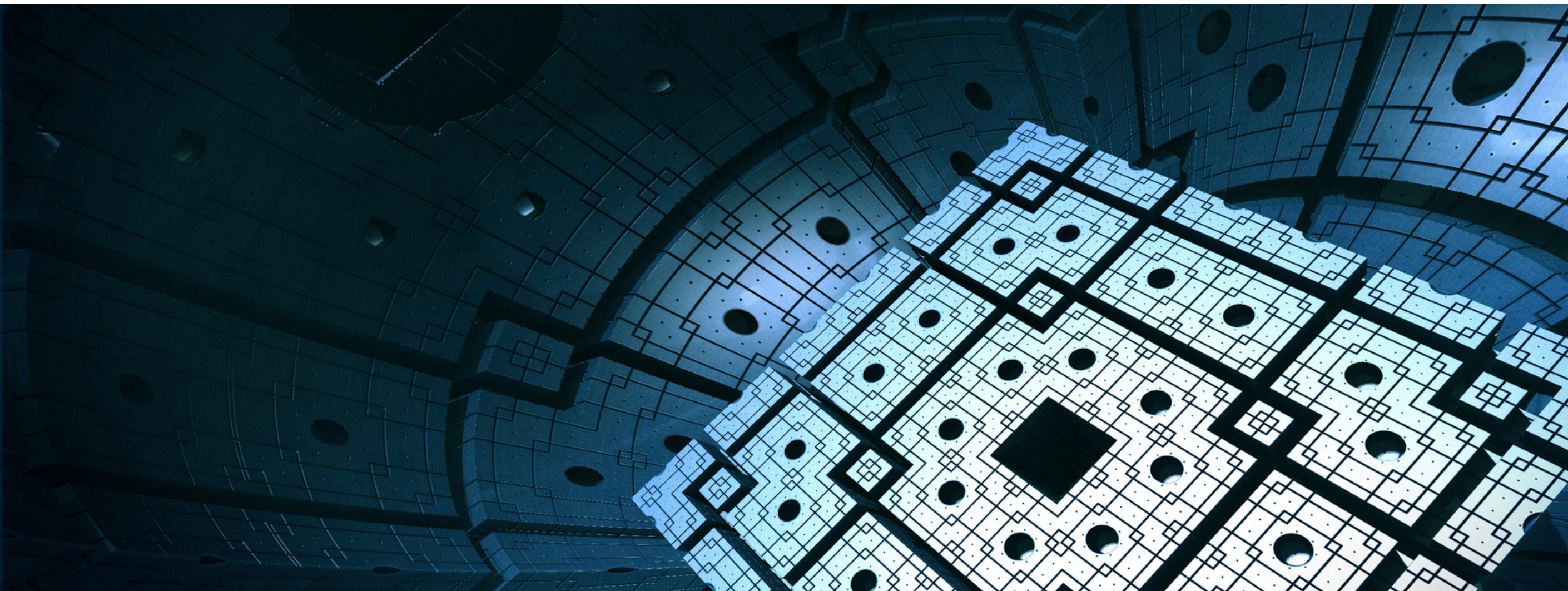


# CUSTOMER VISION FOR THE FUTURE

Now that you've addressed your prospect's pain points it's important to have a discussion about future needs. What is their roadmap? What are their growth goals?

Questions like these will help ensure that the solution is chosen and provisioned with tomorrow in mind:

- What are your goals for the company?
- What is your vision for the future?
- Will you need anything such as:
  - Web/audio collaboration for online meetings/webinars?
  - Unified messaging with text-to-speech?
  - Call accounting/reporting?





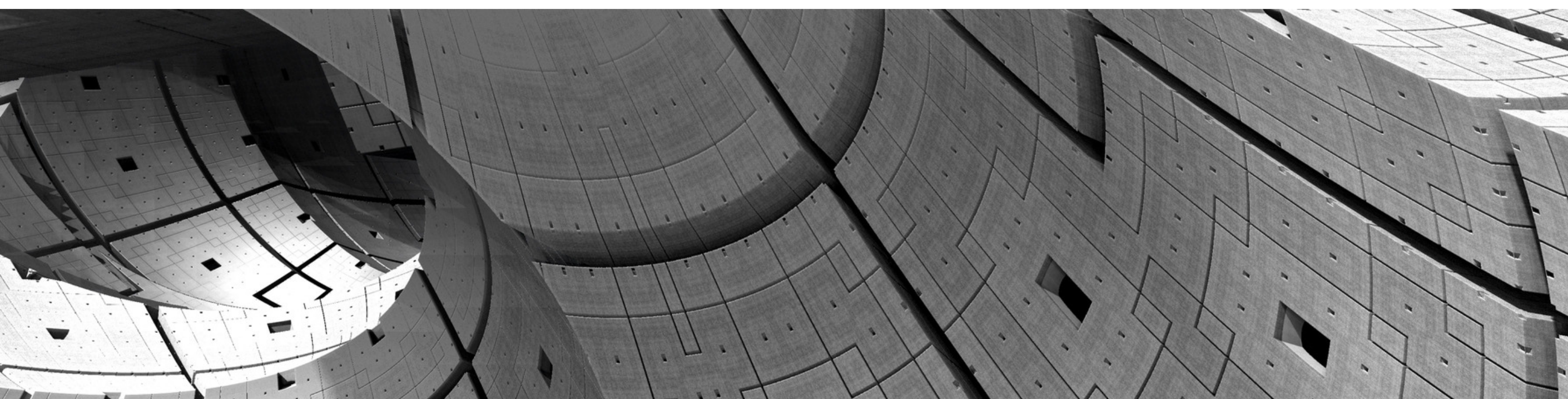
# OBSTACLES TO THE JOURNEY

It's certainly an important step to "Blue Sky" desired outcomes with the customer but just as important to talk about the challenges that will come up.

A good qualification and discovery will take into account the obstacles faced along the journey. As the saying goes, "It's not always about the destination, but about the journey."

Make sure you can overcome the following obstacles when preparing your solution:

- High maintenance costs of current investment
- Impact on infrastructure
- Current solution's quality and capabilities (or lack thereof)
- Current solution's increasing costs





# SOLUTIONS RECOMMENDED

It can be difficult to balance an Executive Summary that's too short and ambiguous and a long, droning epic novel. Where is a happy medium?

Make sure to highlight important issues that the customer has and that you deem important. Leave out extra sections that add too much length but don't add value.

Lastly, make it easy to read by providing bullets or outline formats where applicable, highlighting the following:

- What your solution provides relative to the areas of pain and obstacles along with achieving long-term goals
- How your solution is configured
- What the investment is (both monetary and non-monetary)
- The training and support your company provides





# EXPECTED RESULTS

If you've done your due diligence and properly executed the Qualification and Discovery stages, you will demonstrate a higher level of competence and attention to detail to your customer. You will be able to show the results your customer can achieve with your solution such as:

- Business outcomes they will gain
- The ROI and TCO compared to the status quo
- Benefits for the employees, business owners, and end-customers
- A happy ending for all





# CORSPRO CAN HELP

CorsPro's SalesDoc Architect (SDA) automates the entire sales process - starting with the Qualification and Discovery stages.

By automating the process, SDA allows you to:

- Confidently pursue viable opportunities by asking qualifying questions.
- Configure the correct solution.
- Auto-configure the products and services, and language around what is included and excluded for use in the SOWs.
- Leverage information such as descriptions of pain points and areas of need for outputs such as:
  - discovery memos
  - proposals - including executive summaries
  - statements of work

CorsPro's SalesDoc Architect helps you demonstrate you have listened and understood your customer's needs and concerns.

**Contact us to learn more at:**

**<https://info.corspro.com/contact-us>**

