

# Client Discovery Scripts

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# 1 INTRODUCTION

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Before you begin targeting businesses, it is important to consider the following:

You can't just decide to sell a product or a service to a business.

How do you know the owner needs the stuff you are selling? Each business owner will have unique needs, desires, and ideas about what can help his business grow.

Providing services to a business is a challenge when you don't know what the business owner needs to see a benefit, and even more of a problem if we don't give them what they actually need, instead of delivering a service that doesn't help them.

- How do we know a restaurant needs reputation management?
- How can we tell a bagel shop is shopping for a new website?
- How can we uncover the real problems and develop the most effective solution?

The simple answer to these questions is to ask them; however, you need to ask them in a way that:

- Uncovers the real underlying problem/desire/need so you can apply an effective solution
- Qualifies them as a buyer of the service
- Gives you the best position to ask for the sale

What you need is an email and telephone script that will help you uncover the real needs.

I want to give you the templates that are my most effective 'interview' style sales pitches that uncover the need, qualify them as buyers, and asks for the sale.

There are two common scenarios; the prospects you don't have a relationship with, and clients that you already did work for.

If you haven't done any work for the owner, these pitches will help uncover some of the underlying problems beyond the obvious broken websites, lack of mobile site, or a bad reputation.

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This pitch scenario will help book that first deal.

And if you've done work for a client, this pitch can be used to start a dialogue about other services you can do for them, so you can increase the fees that you charge.

In the templates below, you'll often see words or phrases [enclosed in brackets.] These are places where you can just about substitute any problem or solution in the pitch.

## 2 Pre-Project:

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Used when you've never done any work with a client:

### Telephone Pitch

*Hello Joe,*

*Thanks for meeting with me today. I wanted to ask you a few questions about your business so I can be sure my solutions are right for you, ok?*

*This is showing them that I care about meeting their exact needs. I'm also asking a question immediately, which gets them used to answering them*

*Great – one of the most profitable methods of [generating leads] is using traffic from your existing website. Are you currently [\*generating and selling directly to leads gathered from your website?]*

*(\*This is some benefit that you know the client is missing OR something that you suspect is lacking.)*

*[If No] – Joe, the customers on your website are your hottest prospects. They've already found your website by doing a search. This is buyer intent! You would profit if we tap into this intent, right?*

*[If Yes] – Joe, that's good to hear, most businesses don't take full advantage of their website and its lead generation possibilities, but are you seeing good open and click-through rates on those emails? What's your usual stats look like?*

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*Notice I'm still leading the caller. I'm digging deeper into their mind, and pumping them until I find some service, I know I can fulfill.*

*That's kind of low. Did you know that these are the people who are just seconds from placing an order? Leads from your website show a high degree of buyer intention, so you need to be selling them harder.*

*You need a way to not only [capture the lead,] but also [track that lead and follow up] and also [automatically pitch them on your products & service.] This way you maximize the chances of making a sale on each and every single lead that comes through. You know what I mean?*

*What if I could [setup a form on that website that collects inbound leads,] and [send them right to your sales team or email inbox] and also [setup an auto-responder that sends them a sales pitch for your biggest selling product?]*

*Would that help you [follow up with the lead] and [make sure they are pitched on as many products as possible, earning you the most money per lead?]*

*And what if I could guarantee that these leads were the [most qualified buyers,] and that you and your sales team will find them [the easiest to close?]*

*Not only that, but I will show [exactly how to write these email marketing messages to compel your buyers list to spend even more money with you.]*

*Would you at least [give my sales formula] a try if I can prove that you will earn more money with the leads that are already visiting your site?*

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*I figured you would, I mean let's be real here, if I got you an extra 5 leads this month, you'd make money, am I right?*

*Joe, by using my software, I can provide such a high value to you at very reasonable price. And by using my methods, you will make even more money per lead. The cost is only \$XXX, and you will start seeing results from your website that are worth ten times my little fee in a manner of days.*

*Sound fair enough?*

*Do you have any questions so far?*

*[handle objections and ask for the sale after handling them]*

*Are you ready to get started?*

*Ok, here's what we do. I'm going to send you an email with a link, click that link, and make a small payment of XXX. Once I receive your payment, I'll call you to setup my form and we'll get you started closing these leads. How's that sound?*

*Great. I'm excited that we're working together, and I want you to get excited also, this project is going to [book you more business.]*

*You have any other questions for me Joe? Alright, talk soon! Bye for now.*

### 3 COLD EMAIL – NO RELATIONSHIP

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Subj: how does your sales process work?

Hey Joe,

Sending you this quick message because I'm curious about how your sales process works. I noticed your website today, and I like your [products,] but I'm wondering how you collect and follow up on leads...

Can you tell me if you're collecting and following up leads with an email list?

If you're not already collecting and auto-selling these leads, then you are definitely neglecting your hottest buyers.

I want to setup a brief chat to meet and speak with you; I have a method for taking the customers on your website and selling them on your highest priced products without ever having you pick up the phone to sell them or answer any questions.

I am free [Monday at 9am] or [Thursday at 3pm]; which time is better for you?

Sincerely,  
Name

## 4 POST-PROJECT: UPSELL PHONE PITCH

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**Used when you've already done some work for a client**

*Hey Joe,*

*I wanted to take a few minutes and talk about our last project, and also ask you about [some area you believe they are lacking], ok?*

*\*Provide a brief one or two statements about the past or present project and highlight positive results. Example: "From the stats, I see our landing page received 6150 page views and 1100 customer email op-tins"*

*You use this positive result to lead into another related service or you probe for another need.*

*That's a pretty good list of customers, don't you think?*

*Now, have you emailed them any offers?*

### **[If No]**

*Joe, these are your hottest prospects and they need to be sold on more of your products or services. These customers are practically looking for an excuse to buy from you, we just need to give them a little push.*

*Want to know how I get email customers to buy more of your products?*

### **[Yes]**

*Good to hear, Joe! Listen, what were the results of your email? If you're not connecting with them, meaning they aren't buying, perhaps we need a novel approach to emailing them.*

*Want to know how I get email customers to buy more of your products?*

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*\*\*\*Notice how either a yes or a no prompts the qualifying question. We then move into telling them about the service and how it will benefit them since we know they are doing something related to building their customer email marketing list.*

*I'm taking your best sales message and hottest selling products and crafting a message that gets them clicking through to your sales pages. I send them this message automatically and they are pitched directly, and asked to buy the product.*

*I'll craft the messages for you, and setup the system that collects, organizes, and emails each and every lead with a dynamite sales pitch for the products you want to push on this list.*

*We can even experiment and try different sales pitches for different products you carry until we find the one that really resonates with your customer list, earning you the maximum amount of profit per lead and email sent.*

*Interested so far?*

### **[If Yes]**

*Great – to get started, I only need some time to craft these messages once you tell me the products you want to push.*

*We'll take your best products, highest price, whatever; the products that you know sell well and have a high profit margin for you, and automatically pitch each lead.*

*Do you have any questions so far?*

### **[handle questions]**

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### ***[If No]***

*Why does this not interest you? Couldn't you use the money this email campaign will bring to your business?*

*Look – this is what I think will bring you the best return on investment, and I know online marketing very well, but maybe you have other ideas or areas that need improvement. What other areas are you struggling in? Converting leads into buyers? Getting complimentary reviews on social media or helping to get your videos viral?*

Uncover some need by asking questions about their business. Listen intently and don't interrupt. They will tell you something interesting, guaranteed. By knowing what hot services are out there, and what the benefits are, the owner will say something that will give you an idea when you realize they are lacking a benefit. When you do get an idea, don't interrupt. Wait for them to finish, and then confirm that you understood what they said, and then ask a question or offer an idea.

*I hear you Joe [summarize what they said] and I understand;*

*Offer a solution that will help meet a need you uncovered or supply a benefit you know they don't currently have*

*You're telling me that you think the real problem is your online reputation, do I have that right?*

*Well, here's what you do:*

*You need to press your loyal customer base into action. Get them signing onto Facebook, Yelp, and Google Business to leave positive reviews. In doing this, you drown out the negative reviews and leave*

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*mostly positive reviews for new customers to chew on, you know what I mean?*

*Great – so what I'll do is create a feedback form on your site, and print the address on your receipt. If the customer has a valuable experience, he visits a link that takes them to yelp or your Facebook page. If they have a bad experience, we force them to a form that emails you directly so you can handle the issue in private, and not in front of everyone on Facebook.*

*With me so far?*

*This way you only get positive reviews send to your help page. A few weeks of pushing this and you'll have more positive reviews than you know what to do with. Ok?*

*Do this sound like something that would be helpful?*

*You're damn right. It will vastly improve your reputation, and help you compel more social media audiences to consider your products.*

*Now Joe, can I set this up for you? It only takes a few days and you'll be getting reviews by this time next week. What do you say?*

*Great! – here's what you do next, I'll email you a link, just click it, make your payment, and I'll get to work right away. Look for my email with next steps and we'll start getting you these positive reviews that can only grow your business.*

*Do you have any more questions for me?*

*Ok have a great day Joe, and I'm excited to be working with you again.*

*Look for my email right after you sign up. Bye for now.*

## 5 EMAIL PITCH - WITH RELATIONSHIP

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**Subj:** follow up regarding our work together...

Hey Joe,

Thought I'd send you a quick message about our last project, and just share some interesting stats.

[List some awesome stuff about the last project]

I wanted to get a few minutes with you to talk about your other needs. I can see there are a few changes that need to be made to your website, but let's talk for 5 and explore other areas that we both know I can help.

For example, [we already got you leads] so how about we push your hottest products in an automatic email sequence?

This will sell your customers while you sleep and can actually bring you sales and new customers on-demand!

I am free to meet on Tuesday at 1 pm or Friday at 9am. Which time is better for you?

Sincerely,

NAME

## 6 CLIENT DISCOVERY QUESTIONNAIRE

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Use this question sheet to get specific information from a client or prospect. It is a good practice to provide this question sheet in a separate document and attach that document to an email message once you establish a new relationship with the owner.

- Are you currently working with an advertising agencies or consultants?
- How long have you been in business or at your current location?
- What online marketing tools have you tried in the past?
- What are some of the results you can share from past marketing campaigns?
- Have you ever used a professional marketing consultant?
- What are your quarterly and annual marketing goals?
- Do you have a budget for marketing/advertising? If so, what are you spending now?
- Are you able to measure your return on marketing investment?
- Who is your ideal customer?
- What is your monthly and lifetime customer value?
- How do you get most of your customers?
- Have you ever used Facebook or Google Advertising or SEO?
- What present-day marketing platform interests you the most?
- Have you ever done customer profile research?
- How would you rate your experience with social media marketing?
- Where do you feel the biggest return on investment would come from if you had an unlimited budget?
- How many new customers per month would make you confident in running a monthly online advertising campaign?
- Have you ever used video marketing for your business?
- Have you claimed all of your online profiles for the major search engines and consumer portals / directories?
- Would you be interested in an audit of your online reputation?
- Would you be interested in a website analysis to discover search keywords and online opportunities for lead generation & sales?