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Assessing Discovery Skill Levels – How Does Your Team Rate?

Many sales and presales practitioners say they are skilled at doing Discovery – but are they? Here’s a simple method to assess, based on five levels of increasing proficiency:

- Level 1: Uncovers statements of pain.
- Level 2: Uncovers pain and explores more deeply.
- Level 3: Uncovers pain, explores deeply, broadens the pain and investigates the impact.
- Level 4: Uncovers pain, explores and broadens, investigates impact and quantifies.
- Level 5: Uncovers pain, explores and broadens, investigates impact, quantifies and reengineers vision.

Let’s explore each of these briefly...

Level 1

When doing Discovery, if your presales or salespeople simply uncover “Pain” and go no further, then they are novices.

For example, the prospect offers, “Our current process is manual...” Many vendors leap to propose a solution at this point – let’s call this Level 1 Discovery.

Basic – and clearly insufficient...!

Level 2

Vendor representatives with slightly deeper Discovery skills ask follow-up questions to explore the pain more deeply.

Example:

- The prospect says, “Our current process is manual...”
- Vendor replies, “Sorry to hear this – why is this an issue?”
- Prospect responds, “Well, it takes too long to get the reports we need and there are often errors in the reports...”

This shows a step up in skills attainment – Level 2. The pain is a bit deeper and the impact is beginning to be understood, but we can go (much) further...

Level 3

Practitioners at Level 3 seek to understand more about the impact of the pain on the immediate and extended prospect organization – let's continue the conversation:

- The prospect says, "Our current process is manual..."
- Vendor replies, "Sorry to hear this – why is this an issue?"
- Prospect responds, "Well, it takes too long to get the reports we need and there are often errors in the reports, because of the manual process..."
- Vendor asks, "What's in these reports and how are they used?"
- Prospect answers, "Well, the reports give us visibility into where we have problems to address. When the reports are late – which is nearly always – the delay results in unhappy internal customers..."

This conversation continues, exploring the content of the reports, how they are consumed, the nature of the problems, how the user population is impacted, and how addressing the process impacts the prospect's goals and objectives.

This discussion broadens and deepens the exploration of the pain and seeks to look beyond the workflow. Who else is impacted and in which departments? Is this a local pain or something that affects the organization more extensively?

Level 3 is all about understanding *impact*.

Where can we go from here? To uncover value!

Level 4

At Level 4, presales and salespeople *quantify* the pain, using the prospect's own numbers.

For example:

- Vendor says, "You noted that it takes too long to get these reports done – how long is it taking today?"
- Prospect responds, "Oh, it takes about a week – 5 working days..."
- Vendor asks, "How long would you like it to take – or need it to take – to feel you've really addressed this problem?"
- Prospect answers, "Well, if we could get these done accurately in a half a day, that would be terrific...!"

Now we have a tangible Delta of value – the difference between the prospect’s current state and their desired future state – of 4.5 days. Our vendor should further explore this by asking how often the reports are generated, how often errors occur (and what happens when they do) and how much time is consumed by the team creating these reports.

The answers to these questions might result in the following exchange:

- Vendor summarizes, “So, if I understand correctly, generating these reports is currently consuming nearly 1.5 FTEs annually, and taking 4.5 days longer than you want – in addition it is causing below-desired internal NPS numbers for you and your team.”
- Prospect responds, “That’s correct – and I hadn’t really internalized the full cost of this problem until now...!”

Level 4 skills are all about uncovering *value*.

Can we do better than this? Absolutely...!

Level 5

Practitioners at Level 5 *reengineer* the prospect’ vision of a solution.

In our conversation from above, our vendor asks the prospect to describe or share an example of the report currently used. After viewing the report, the vendor realizes that it is lacking certain capabilities or possibilities, and explores these with the prospect:

- Vendor notes, “It looks like you have a good basic view of the what’s working and what’s not in these reports, but they are static, if I understand correctly... Would it be useful or interesting to be able to drill down to find the root causes, right from the report?”
- Prospect responds, “Wow, yes that would be terrific – that would save a lot of time...!” [How time savings might also be explored here...]

Our vendor has now proposed an improved version of the report – and the prospect has agreed this would be better. This is one example of Vision Reengineering – going beyond the prospect’s initial vision of a solution.

The ability to execute this kind of Vision Reengineering is a Level 5 skill.

Level 5 with a Differentiating Twist

Vision Reengineering is *also* an opportunity to outflank competition.

In our example conversation, our vendor realizes that he/she has a relevant capability that is not matched by the competition and introduces it as follows:

- Vendor notes, “Many of our other customers, in similar situations to what you’ve described so far, found it very useful to have these reports sent automatically to the consumers via an email link – but *only* when there was a problem to be addressed. Our customers report that they didn’t waste time accessing reports where there were no issues – in some cases, they reported saving several hours every week. Is this a capability you’d also like to have?”
- Prospect answers, “Wow – yes, that would be really helpful for us as well...!”
- Vendor offers, “Great – let’s plan to include it in the demo...”

Here, our vendor rep has introduced the alert-based capability – a key differentiator – and turned it into a Specific Capability that the prospect wants and expects in a solution.

The folks at Level 5 not only reengineer vision but also competitively outflank.

5 Skill Levels for Doing Discovery

Recapping:

- Level 1: Uncovers statements of pain.
- Level 2: Uncovers pain and explores more deeply.
- Level 3: Uncover pain, explores deeply, broadens the pain and investigates the impact.
- Level 4: Uncover pain, explores and broadens, investigates impact and quantifies.
- Level 5: Uncover pain, explores and broadens, investigates impact, quantifies and reengineers vision.

These 5 levels represent a simple method of assessing the state of your team’s Discovery skills. Note that there are many other skills not addressed in this simple ranking system, including managing timing and flow, probing methods, workflow analysis, going beyond the workflow, dealing with “burn victims”, starting Discovery, “Why” questions, uniqueness, and many more. ([Contact us](#) if you would like to discuss.)

What do you use to assess *your* team’s Discovery skills?

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