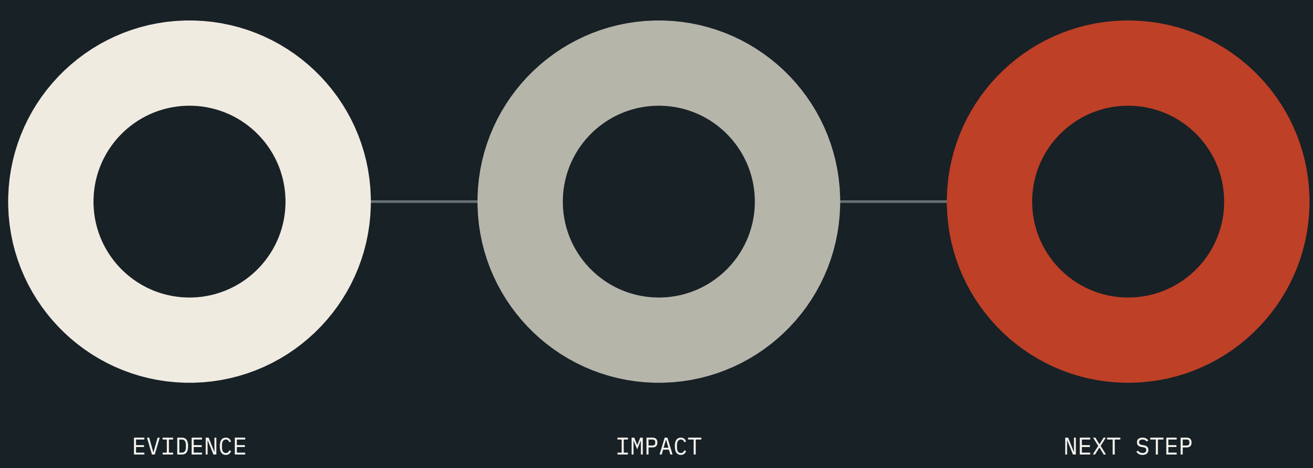
THE FIELD MANUAL SERIES

The Discovery Playbook

Find the real problem. Validate the impact. Earn the next step.



Annotated conversations / Impact cases / Practical worksheets

RESEARCH EDITION / 2026

35 PAGES

READ / CALCULATE / DECIDE

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FIELD GUIDE / START HERE

A useful call changes what both sides know

Discovery is a working conversation about whether a problem is worth solving and whether you can help. A good call leaves the buyer with a clearer view of the situation and leaves you with evidence for the next decision. It can also reveal that there should be no next sales meeting.

This book is for SDRs learning to qualify and AEs running deeper evaluation conversations in B2B technology sales. The methods are intentionally adaptable. A ten-minute inbound call and a complex operational workshop do not need identical agendas or identical levels of detail.

The outputs you are working toward

- A specific description of the current workflow and the problem within it.
- A buyer-confirmed account of impact, importance and desired change.
- A map of who needs to participate in the evaluation and decision.
- One useful, agreed next step, or a clear reason to stop.

Use the book with a real opportunity

Read the preparation pages, run the call, then use the evidence worksheet and coaching rubric. Compare what the buyer actually said with what you entered in the CRM. Work through the fictional Northstar case if you do not have a live opportunity.

> Northstar Services, its people and all numerical examples are fictional. Scripts, worksheets and scoring rules are original teaching tools, not experimentally validated performance guarantees.

Research reviewed September 2026. SPIN and MEDDIC are attributed frameworks; this is independent practical instruction, not official certification. Sources support the definitions noted beside them. They do not prove that using a script will produce a sale.

01 / BEFORE THE CONVERSATION

Prepare a hypothesis you are willing to abandon

Research should help you ask a relevant question. It should not convince you that you already know the answer. Separate what you observed from what you inferred.

Preparation item	Fictional Northstar example	Status
Public observation	Northstar advertised five onboarding roles	Observed posting; date recorded
Possible implication	Customer onboarding volume may be growing	Hypothesis
Possible problem	Handoffs may be difficult to coordinate	Unconfirmed
Useful opening question	What prompted the investment in onboarding?	To ask

Before the meeting, review the company, the attendee's role, the reason the conversation exists and any approved prior notes. Write one likely workflow, two possible challenges and one reason your hypothesis could be wrong. A new hiring round might reflect replacement hiring rather than growth.

Prepare the right proof

Choose a relevant product capability and an approved example you can show if the conversation supports it. Do not prepare a long demonstration around a problem the buyer has not acknowledged.

Bound the research

For an ordinary first meeting, use a time budget that matches the opportunity and your workload. Stop when you can explain why the meeting might matter and identify the unknowns. More browsing is not automatically better preparation.

> Pre-call sentence: "I noticed ___. That might mean ___, but I need to ask ___ before treating it as a problem."

Never invent customer results, relationships or internal company knowledge to make the hypothesis sound authoritative.

01 / BEFORE THE CONVERSATION

Agree on the work of the meeting

Open with a purpose the buyer can edit. Confirm the time, acknowledge their reason for attending, and explain how you propose to use the conversation. Leave space for a different priority.

> "Thanks for making time, Priya. We have 30 minutes. You mentioned that onboarding handoffs have become harder to track. I suggest we understand the current process, look at where it breaks down, and decide whether there is a useful next step. What would you add or change?"

If the buyer wants a demonstration immediately, do not defend your agenda as a rule. Ask for the minimum context needed to make the demonstration relevant: "Happy to show it. Which workflow should I focus on, and what would you need to see to judge whether it fits?"

An adaptable 30-minute starting structure

Time	Work to accomplish
First 3 minutes	Purpose, buyer priorities and meeting shape
Next 10 minutes	Current workflow and a concrete problem example
Next 10 minutes	Impact, desired change and relevant stakeholders
Final 7 minutes	Summarize, test fit and agree on the next decision

This is an original planning aid, not an optimal timing formula. Move with the conversation. A serious issue may need more exploration; a clear mismatch may justify ending early.

If recording or using an AI note-taking tool, follow your employer's approved process and applicable consent requirements. Explain its presence. Do not activate it merely because a platform permits the button press.

02 / UNDERSTAND THE CURRENT STATE

Reconstruct the workflow before diagnosing it

Ask the buyer to walk through a recent event. Specific events reveal sequence, ownership and exceptions more clearly than abstract statements such as "our process is inefficient."

A workflow walk-through

"Take the most recent customer onboarding. What started the process, who picked it up, and what happened before the customer reached their first milestone?"

Follow the story. Ask what happens at each handoff, what information is required, and where the record lives. If they say a step is automated, ask what the automation actually does and what still requires a person.

Element	Question to clarify
Trigger	What starts this work?
Owner	Who is responsible at this point?
Input	What information or approval is needed?
Handoff	How does the next person know it is their turn?
Exception	What happens when something is missing?
Finish	How do you know this case is complete?

Northstar example

Priya says sales enters a closed deal in the CRM, an onboarding coordinator copies details into a spreadsheet, and a technical specialist receives an email. The record becomes difficult to follow when the specialist needs missing information from sales.

You now have a candidate issue: the missing-information loop. You do not yet know its frequency, importance or whether your product can address it. Ask about the last occurrence before suggesting a fix.

> Summarize in their language: "So the uncertainty starts when the specialist needs information that did not arrive with the handoff. Have I understood that correctly?"

02 / UNDERSTAND THE CURRENT STATE

Separate symptoms from the problem worth solving

Buyers can name a symptom before they can describe its cause. "We need a dashboard" is a proposed solution. "We cannot tell which onboarding cases are waiting on sales" is a problem statement you can investigate.

Follow the chain without forcing it

Ask what the buyer cannot do today, when that limitation matters, who feels it and what they have tried. Avoid treating your preferred cause as established fact.

Buyer statement	Useful follow-up
"Everything is manual."	Which manual step creates the most rework?
"We need better reporting."	What decision is difficult with the current report?
"The team is frustrated."	What happened the last time that frustration showed up?
"We lose visibility."	What information is missing, and at which handoff?

A disconfirming question

"When does the current process work well? What is different in those cases?"

If Northstar's small customers onboard smoothly while large customers stall, the problem may involve complexity, missing technical information or ownership rather than a universal lack of dashboards. The exception is useful evidence.

Do not manufacture pain

If the buyer describes a mild inconvenience with little consequence, do not escalate the language until it sounds urgent. Ask where it sits among their priorities. It may be reasonable for them to live with it.

> Working problem statement: "When [event] happens, [person/team] cannot [specific action], which leads to [observed consequence]."

Keep "observed consequence" empty until the buyer supplies evidence. An empty field is more honest than a plausible story you invented.

02 / UNDERSTAND THE CURRENT STATE

Use SPIN as a question lens

SPIN describes Situation, Problem, Implication and Need-payoff questions. Huthwaite presents these as a flexible framework, not a fixed sequence that every conversation must follow. Huthwaite: SPIN methodology

The original Northstar examples below show how you might apply those question types. Use them to identify what you need to learn, then choose natural wording for the buyer.

Lens	Original question	What the answer can clarify
Situation	How is an onboarding case assigned today?	Workflow and ownership
Problem	Where did the last assignment get stuck?	A concrete difficulty
Implication	What did that delay change for the team or customer?	Consequences
Need-payoff	If that handoff worked reliably, what would become easier?	Desired benefit

Listen for the next useful question

If a buyer begins with a specific consequence, you do not need to drag them back to basic company facts. Explore the consequence, then fill missing context when it becomes necessary.

Avoid the interrogator's version

Asking four questions in rapid succession does not create a useful discussion. Acknowledge the answer, summarize what it means, and let the buyer correct you. Share relevant information when it helps them reason through the issue.

> Practice drill: take a real buyer statement and write two possible follow-ups. Choose the one that tests the most important uncertainty, not the one that completes an acronym.

Afterward, review whether the question helped the buyer explain their situation. Counting how often you used each category is less useful than examining what you learned.

02 / UNDERSTAND THE CURRENT STATE

Follow the answer instead of the script

Many discovery calls become shallow because the rep moves on as soon as the buyer mentions the expected topic. Stay with a meaningful answer long enough to understand it.

The follow-up ladder

- Clarify: "When you say 'late,' what does late mean here?"
- Locate: "Where in the workflow does the delay begin?"
- Illustrate: "Could you take me through the most recent example?"
- Quantify carefully: "How often has that happened in the period you track?"
- Test interpretation: "Is the main issue the time spent or the uncertainty it creates?"

These are optional moves. Do not ask all five automatically. If the buyer does not know a number, ask who could verify it or whether a small sample would be useful.

Northstar exchange

Priya: "Onboarding is too slow."

Rep: "Where do you see the time accumulating?"

Priya: "Usually waiting for the technical requirements."

Rep: "What happened in the last case where those requirements were missing?"

The rep has moved from a general complaint to a testable workflow issue. The next step is to understand the case, not immediately claim that the product eliminates delays.

Give the buyer room

Ask one question at a time. If silence follows, allow thinking time rather than filling it with several alternatives. If a term is unfamiliar, ask for its meaning in their organization.

> Useful listening is visible: your next question should make sense only because you heard the last answer.

03 / ESTABLISH THE BUSINESS CASE

Distinguish impact from inconvenience

Impact is the effect of the problem on work the buyer values. It may involve cost, time, customer experience, risk or capacity. Not every effect can or should be converted immediately into dollars.

Explore three layers

First, identify the operational consequence: repeated data entry, a delayed handoff or a missed service commitment. Then ask who is affected and what they do in response. Finally, ask which business objective this changes.

For Northstar, a missing requirements document might cause a specialist to chase sales, push back a kickoff and require the coordinator to update several people. Those are separate effects. Some may overlap; avoid counting the same time twice.

Questions that preserve accuracy

"What did the team do because of the delay?"

"Which of those effects do you measure today, and which are estimates?"

"If the delay disappeared, would that release capacity, reduce spending, or mainly improve predictability?"

Respect the buyer's priorities

A process can waste time without justifying a purchase. Ask how the issue compares with other work competing for budget and attention. A quantified effect is part of a decision, not proof that your solution is necessary.

> Working distinction: time released is not automatically cash saved. Cash savings require a credible explanation of which spending changes and when.

Label softer benefits in their own terms. "Fewer status-chasing messages" can be a useful operational goal without inventing a financial value for every message.

03 / ESTABLISH THE BUSINESS CASE

Build an impact estimate with visible assumptions

Start with a small model that the buyer can correct. Use their measured inputs where available and clearly label estimates. Keep the model separate from a product-performance promise.

Fictional Northstar capacity case

Northstar estimates 60 onboarding cases per month, with 25 minutes of avoidable chasing per case. A fully loaded labor assumption of $48 per hour is supplied for the exercise. The annual period is 12 months.

Step	Calculation	Result
Monthly time	60 x 25 / 60	25 hours
Annual time	25 x 12	300 hours
Annual capacity value	300 x $48	$14,400
Illustrative 50% reduction	150 hours x $48	$7,200

The 50% reduction is a hypothetical scenario to test, not an established product outcome. The $14,400 is a capacity valuation of the estimated work, not verified recoverable cash. A buyer who keeps the same staffing and spending may realize capacity rather than a budget reduction.

Stress-test the estimate

What share of cases actually has this problem? Does the 25-minute estimate include overlapping work? Was the hourly rate supplied by the right person? Is the period representative? What new work would the proposed solution introduce?

> Send the assumptions with the result: "This estimate depends on 60 cases, 25 minutes and a $48 rate. Which inputs should we revise before using it?"

The strongest model may be smaller than your first estimate. Credibility matters more than a large headline.

03 / ESTABLISH THE BUSINESS CASE

Use a business case to find the next question

An early value estimate should guide evaluation. It should not become a polished ROI claim before the inputs and costs are understood.

A sobering extension of the Northstar example

Suppose a proposed system costs $12,000 annually plus $3,000 for first-year implementation. If the only supported benefit is the hypothetical $7,200 capacity value from the prior page, the first-year benefit minus cost is negative $7,800. The stated case does not support buying on labor value alone.

Do not repair the result by inventing churn prevention or attributing all future revenue to the product. Ask whether there are other material outcomes and what evidence would support them. The buyer may value predictability enough to proceed, but that should be their stated rationale.

If you report a ratio

For the simplified example, (benefit - cost) / cost equals ($7,200 - $15,000) / $15,000 = -52%. This is an illustrative value-to-cost calculation using capacity value. It is not a forecast of cash ROI and excludes timing, tax and discounting.

Learn what would change the conclusion

Could a limited pilot measure the actual time difference? Would the system replace a documented expense? Is there a higher-priority workflow where it is more relevant? Or should the opportunity stop?

> A discovery rep earns trust by naming a weak business case. Your job is to help evaluate fit, not to make every spreadsheet turn positive.

Record the unresolved input and the person who can validate it. That is a concrete next step.

03 / ESTABLISH THE BUSINESS CASE

Find a reason to act that belongs to the buyer

A real deadline connects to a buyer event, a consequence and the work required beforehand. Your quarter-end date is not automatically the buyer's reason to change.

Test the timing

"What happens on October 15 that makes this date important?"

"What would need to be working before then?"

"If the date moved, what would change for the business?"

"What other projects or approvals could affect the schedule?"

If the buyer cannot identify a meaningful consequence, record the date as a preference rather than an immovable deadline. A preference is still useful; it simply supports a different level of confidence.

Northstar's event

Priya wants a new process before a planned onboarding volume increase. The rep asks whether the hiring date, customer commitments and internal training schedule are confirmed. If those events are still tentative, the evaluation plan should reflect that uncertainty.

Work backward carefully

Separate a purchase decision from implementation readiness. A signature on the desired launch date may be too late if configuration and training take additional time. Ask the responsible teams to estimate their own tasks rather than inventing a standard implementation duration.

> An honest urgency statement: "You want the workflow ready before [event] because [consequence]. We still need [owner] to confirm [dependency]."

Do not introduce false scarcity or imply that a buyer's problem becomes worse on your pricing deadline. Keep commercial terms and operational timing distinct.

04 / QUALIFY THE OPPORTUNITY

Use MEDDIC to organize evidence

MEDDIC names six qualification areas: Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain and Champion. MEDDICC adds Competition; MEDDPICC also includes Paper Process and, in MEDDICC's current terminology, uses Implicate Pain. Keep the variants distinct. MEDDICC: methodology definitions

Use your employer's chosen version consistently. The original working questions below help turn labels into evidence rather than a completed-looking CRM form.

Area	Working question for your notes
Metrics	Which outcome is measured, on what basis?
Economic Buyer	Who can authorize the investment?
Decision Criteria	What will the buyer use to judge fit?
Decision Process	Which people and steps lead to a decision?
Identify Pain	What specific problem matters enough to examine?
Champion	Who can and will advocate internally?

Do not make the buyer sit through the acronym

You can gather relevant evidence over several conversations. A first call may establish a problem and introduce the right operational owner without resolving final approval. Record the missing evidence and choose the next conversation accordingly.

Qualification changes

An initial advocate may leave. A budget owner may change. A new requirement may emerge. Revisit important assumptions when the opportunity changes rather than treating an old answer as permanently true.

> For each field, record the buyer's evidence, your interpretation and what remains unknown. A label without supporting evidence is a hypothesis.

04 / QUALIFY THE OPPORTUNITY

Metrics need a baseline, owner and definition

A metric is useful only if the participants mean the same thing by it. "Reduce onboarding time" could refer to days from contract to kickoff, hours of employee effort, or days until the customer reaches a milestone.

Make the measure operational

Element	Northstar working definition
Metric	Days from complete requirements to kickoff
Start event	Requirements checklist accepted
End event	Customer kickoff held
Baseline	To be calculated from a defined sample
Owner	Onboarding operations lead
Desired change	Buyer to set after baseline review

The first and last events matter. Measuring from signature in the baseline but from complete requirements in the pilot would make the comparison misleading.

Ask about the data

Who maintains the record? How many cases are available? Are canceled or atypical cases included? Is the measure an average, a median or a range? What other changes might influence it during the evaluation?

Avoid easy-looking targets

Do not suggest a percentage improvement merely because it looks good in a proposal. Establish what the buyer needs, what is technically plausible and how the result can be measured. A pilot can test an uncertain outcome; it cannot guarantee it in advance.

> Confirmation prompt: "Before we use this number, can we agree on the start event, end event, sample and owner?"

Without reliable data, agree on how to collect a baseline. Keep guesses separate from measurements.

04 / QUALIFY THE OPPORTUNITY

Find authority without making the contact smaller

Your contact can be knowledgeable and influential without holding final spending authority. Ask about how decisions are made without implying that their participation is unimportant.

The economic buyer concept concerns overall buying authority. Job title alone is not enough to establish it. MEDDICC: economic buyer

Respectful process questions

"If the team decides this is worth pursuing, who needs to approve the investment?"

"How did a similar purchase move through the organization?"

"What will that person need to see to evaluate the proposal?"

"Would it be useful to review the assumptions with them once we have the baseline?"

Bring a reason for access

Do not ask for an executive meeting simply to satisfy your qualification checklist. Explain the decision it would help: confirming the business priority, validating investment criteria or resolving a tradeoff the operational team cannot settle alone.

When access is not available

Ask how the buyer wants the decision brief prepared, which questions should be answered and when feedback can be shared. Record the access limitation without automatically disqualifying the deal or pretending the limitation does not matter.

> Internal note: "Priya says the VP approves new software above the team's authority. We have not confirmed the VP's priorities or reviewed the proposed investment with them."

That note is more useful than "economic buyer identified" because it exposes the remaining work.

04 / QUALIFY THE OPPORTUNITY

Map decision criteria before tailoring the demo

Decision criteria describe how the buyer will judge a solution. Some are mandatory constraints; others are preferences or commercial tradeoffs. Your product feature list is not the buyer's criteria list.

Build a short criteria map

Criterion	Type	Proof needed	Owner
Existing CRM integration	Must-have	Approved workflow test	Systems lead
Clear exception ownership	Desired outcome	Buyer scenario demonstration	Operations
Acceptable access controls	Must-have	Security review	Security team
Affordable total cost	Tradeoff	Scope and cost review	Budget owner

All entries are fictional. In a live opportunity, let the buyer correct the list and identify who judges each item. A requirement described by one person may mean something different to another team.

Ask about priority and failure

"Which requirements would rule a solution out?"

"Where are you willing to trade convenience against cost or effort?"

"What evidence would count as a satisfactory answer?"

Do not quietly redefine a requirement

If your product cannot meet an important criterion, say so. Explore whether an approved alternative meets the underlying need, but do not label a workaround equivalent without the buyer's agreement.

> Demo preparation starts here: select the smallest set of scenarios that tests the buyer's most important criteria. Avoid demonstrating every feature simply because time is available.

Record unresolved technical claims as questions for the appropriate specialist. Discovery is not permission to invent an integration or security capability.

04 / QUALIFY THE OPPORTUNITY

Decision process and paper process are different

A team can prefer your solution before the organization is ready to sign. Legal review, vendor setup and security checks may still remain. MEDDICC's paper-process guidance distinguishes these completion steps from the decision to buy. MEDDICC: paper process

Build two connected maps

The decision map records how the buyer evaluates options and authorizes investment. The completion map records the approvals, documents and administrative steps required afterward or in parallel. The exact order belongs to the buyer's process.

Step	Owner	Dependency to clarify
Workflow evaluation	Operations	Agreed success criteria
Technical review	Systems team	Integration information
Investment approval	Budget owner	Cost and outcome brief
Security review	Security team	Requested evidence
Contract review	Legal or procurement	Current approved terms
Vendor setup	Finance operations	Required supplier details

Ask without pretending to know the duration

"Which of these steps apply here, who owns them, and which can happen at the same time?"

"What has caused delays in similar purchases?"

"When should we involve those teams so they have enough time?"

> A date in the CRM is not a completion plan. Every material dependency needs an owner and evidence that the step is understood.

Keep sensitive security and contract materials in approved channels. Bring specialists into questions that require their authority rather than promising an answer during discovery.

04 / QUALIFY THE OPPORTUNITY

Test a champion through observable action

MEDDICC describes a champion as having influence, advocating internally and holding a vested interest in the outcome. A friendly or helpful contact may be a coach without meeting all those conditions. [MEDDICC: champion]

The practical checks below are original applications. They are not a demand that a buyer perform favors for you.

Observation	What it suggests	What it does not prove
Explains internal priorities	Useful organizational knowledge	Spending authority
Corrects the business case	Investment in an accurate outcome	Approval to purchase
Introduces a relevant stakeholder	Ability to coordinate participation	Final consensus
Advances an agreed internal action	Active advocacy	Guaranteed deal success

Offer something useful to carry internally

Help your contact summarize the problem, the evidence, the open questions and the proposed evaluation. Make the brief credible enough that they can use it without you present. Do not write an inflated ROI case that puts their reputation at risk.

Northstar test

Priya agrees to review the baseline with the operations analyst and invites the systems lead to assess the integration requirement. Those actions provide evidence of coordination. The rep still needs to understand the budget owner's priorities and the team's willingness to implement a change.

> Better internal language: "Priya has taken these two actions; advocacy with the budget owner is still untested."

If your contact cannot make an introduction, ask what would help or what constraint exists. Avoid equating every access limit with lack of support.