

Discovery call checklist

Before, during, and after. Print it, keep it next to you on the call, and tick as you go.

THE ONE THING TO REMEMBER

Ask about what already happened, **in their words**. Then stay quiet long enough to hear the real answer.

Before the call 10–15 min

Most of a good call is decided here.

- ☐ **Name the one thing you want to learn.** A question about their world, not a feature you want to build.
- ☐ **Write down your assumptions.** What do you believe is true that you haven't actually checked?
- ☐ **Draft 5 open questions.** Start them with "Tell me about the last time..." or "Walk me through..."
- ☐ **Run the 4-part test on each one.** Does it hold the answer, hint at a right answer, allow yes/no, or ask about the future? Rewrite it.
- ☐ **Pick a recent moment to anchor on.** Something specific they did in the last few weeks, not "in general."
- ☐ **Set it up properly.** Ask permission to record, check your tech, and plan 30–45 minutes.
- ☐ **Decide your talking share.** Aim to listen about four-fifths of the time.
- ☐ **Park your pitch.** Decide now what you will not say until the end.

During the call Stay curious

You're there to learn, not to be right.

- ☐ **Open warm and honest.** "There are no wrong answers, and I'm not here to sell anything."
- ☐ **Start with their story.** Their day, their last attempt, their words. Your product comes later.
- ☐ **Ask for an example every time.** When you hear "always" or "usually," ask "Can you tell me about the last time?"
- ☐ **Pause after they finish.** Count to three or four before you speak. The useful detail often lands in the silence.
- ☐ **Use neutral follow-ups.** "Tell me more." "What happened next?" "How did you handle that?"
- ☐ **Don't fix, defend, or pitch.** Write it down and keep going.
- ☐ **If you led, take it back.** "Let me rephrase that. I don't want to put words in your mouth."
- ☐ **Show ideas last.** Get their first, unexplained reaction before you say what you meant.
- ☐ **Finish with a wide-open question.** "What should I have asked you that I didn't?"

After the call Within 24 hours

Capture it while it's fresh, and turn it into one improvement.

- ☐ **Save the recording or transcript.** Remove names and sensitive details before you share or paste it anywhere.
- ☐ **Split what you heard from what you assumed.** Three things they said, three things you filled in yourself.
- ☐ **Mark the moments you led or talked too long.** Those are your practice points.
- ☐ **Note what surprised you.** Surprise is usually where the learning is.
- ☐ **Pick one thing to change next time.** Just one. Then look for it in your next call.
- ☐ **Get a second opinion on your technique.** Paste the transcript into Verafair for a plain-language report.