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Better Sales Discovery Conversations — A Practical SPIN Questioning Guide for UK SMEs

A practical, UK-focused guide and workbook that helps small-business owners and client-facing teams use Situation, Problem, Implication and Need-payoff questions to run more useful sales discovery conversations. Includes question banks, a fictional worked dialogue, common-call responses, a 30-day practice plan, outreach safeguards and reusable planning pages.



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Before you begin

A good sales conversation is not a performance or a race to present every feature. It is a structured way to understand whether a real problem exists, whether it matters enough to address and whether your offer is a sensible fit.

This guide is for UK small business owners, managers and client-facing teams who sell services, products or systems to other businesses. It uses **SPIN** as a plain-English questioning structure:

Stage	What it means	The purpose
Situation	Understand the present set-up	Get only the context needed to have a useful conversation.
Problem	Identify what is not working	Help the buyer describe a specific difficulty, frustration or gap.
Implication	Explore the effect of leaving it unresolved	Understand the practical consequence without exaggeration or pressure.
Need-payoff	Let the buyer describe the value of improvement	Connect a possible solution to the buyer's own priorities.

SPIN is a guide to discovery, not a script to force someone towards a purchase. A prospect may conclude that the issue is not important, that now is not the right time, or that another option is better. That is useful information. Your job is to understand the situation accurately and make an honest recommendation.

Who this guide is for

Use it when you sell a recurring service, a project, a trade service, a professional service, a business product, software or an improvement to an existing client relationship. It is especially useful when the buyer has more than one concern or when you need to understand a process before quoting.

It will not replace product knowledge, a clear scope, suitable contracts or specialist advice. Do not use discovery questions to give legal, medical, financial or other regulated advice beyond your competence.

A note on examples and results

The businesses and conversations in this guide are **fictional teaching examples**. Any amounts, timings, volume assumptions or possible outcomes are illustrative prompts, not market benchmarks, promised results or Ascendea client outcomes. Ask the buyer for their evidence rather than assuming that a pattern from another business applies to them.

The consultative mindset

A product-led conversation starts with what you want to sell:

“Let me show you our service and all the things it can do.”

A consultative conversation starts with the buyer’s working reality:

“Could you talk me through how you handle this today, and where it becomes difficult?”

That change does not mean hiding your offer. It means earning the right to explain the relevant parts of it. If you understand the process, the people involved, the constraints and the consequence of a problem, you can say one of three honest things:

1. **There is a fit.** Explain the relevant scope, assumptions and next step.
2. **There may be a fit, but more evidence is needed.** Propose a sensible assessment, trial or follow-up with the right person.
3. **There is no fit.** Say so. A poor-fit sale creates delivery problems for both parties.

Listen for facts, not just agreement

A polite “That sounds interesting” is not evidence that a problem is important or that a buyer is ready. Listen for specific examples:

- what happened the last time the issue occurred;
- who was affected and who owns the process;
- what they do now to work around it;
- what has already been tried;
- what happens if nothing changes; and

- how they will decide whether a change is worthwhile.

Write down the buyer's words where possible. They are more useful than your guess about what they mean. Do not turn a vague frustration into a confident business case on their behalf.

A short self-check before you change anything

Think about your last three sales conversations. Write a brief answer to each question.

- When did you start explaining your offer: before or after you understood the buyer's issue?
- Which question produced the most useful answer?
- Where did you fill a pause instead of letting the buyer think?
- What did you learn about the current process, the consequence of the issue and the decision process?
- Which claim, estimate or recommendation did you make without enough evidence?

The aim is not to reach a perfect talk-to-listen ratio. The aim is to leave each conversation with clearer facts, clearer uncertainty and an appropriate next step.

Prepare for a useful conversation

Preparation prevents basic questions from taking over the meeting. It also helps you decide whether a prospect is suitable before you commit time.

A simple preparation sequence

1. **Read what is publicly and legitimately available.** Look at the organisation's website, services, locations, job roles and recent public announcements. Do not pretend this research gives you inside knowledge.
2. **Decide what you need to learn.** Pick a small number of situation questions. For example: who owns the process, what happens today and what system or supplier is involved.
3. **Write two or three possible problem areas.** Treat them as hypotheses, not facts. Phrase them as questions.
4. **Prepare one credible, narrow description of your offer.** Be ready to explain what it does, what it does not do and what must be confirmed before you quote.
5. **Agree the purpose at the start of the call.** For example: "I'd like to understand how this currently works, whether there is a problem we can responsibly help with and, if there is, agree a sensible next step."
6. **Bring a note template.** Use the call record later in this guide. Notes help you avoid relying on memory and make it easier to follow up accurately.

Keep the meeting a conversation

You do not need to ask every question in every category. A long list of basic questions feels like an interrogation. Ask one useful question, listen, then use the answer to choose the next question.

A practical rhythm is:

1. Ask an open question.
2. Let the person answer without interrupting.
3. Summarise in plain words: “So the main difficulty is the handover between the office and site team — have I got that right?”
4. Ask one relevant follow-up question.
5. Only introduce a solution when you can connect it to something the buyer has actually said.

Stage 1: Situation questions — establish the facts

Situation questions build enough context to understand the current set-up. They should not become a full audit before you know whether there is a meaningful issue.

What a good situation question does

It is relevant, easy to answer and connected to a decision you may need to make. It is not a chance to show off what you have researched.

Context	Useful situation questions
Trades or field services	“How does a new enquiry reach the person who can quote?” “Who updates the customer if a job date changes?” “What tools do the office and engineers use?”
Professional services	“How does a new client move from first enquiry to onboarding?” “Which team member owns the handover?” “How do you currently know whether a client has received the next step?”
Retail, wholesale or multi-site stock	“How do staff check availability today?” “Who reconciles information between locations or systems?” “When do you discover that a record and reality differ?”

Context	Useful situation questions
B2B service provider	“What prompted you to look at this now?” “Who uses this process day to day?” “Who else needs to be comfortable with a change?”

Use preparation without pretending certainty

You might say:

“I saw that you work across several sites. To make sure I understand the day-to-day reality rather than make assumptions, how do staff currently share availability and job updates?”

This shows preparation but leaves the buyer in control of the facts.

Avoid these common errors

- Asking for sensitive commercial, personal or client information you do not need.
- Asking ten background questions before explaining why the conversation may help.
- Assuming that one person speaks for every user or decision-maker.
- Treating a tool name as an explanation of the process. Ask how people actually use it.

Stage 2: Problem questions — identify what is not working

Problem questions help a buyer put a specific difficulty into words. Keep your language neutral. You are exploring a possible issue, not proving that their current team has failed.

Areas to explore

Area	Questions to adapt
Time and effort	“Which parts of this take more time than you think they should?” “Where does work tend to wait?” “What gets repeated or entered twice?”
Quality and rework	“Where do mistakes or missing details tend to appear?” “What usually has to be checked or corrected?” “What happens when information is unclear?”

Area	Questions to adapt
Cost and waste	“Which parts are costly to maintain or resolve?” “Are there avoidable rush charges, repeat visits or write-offs?” “What does the current workaround involve?”
Capacity and service	“What makes it hard to take on more of the right work?” “When demand rises, where does the process become strained?” “Which customer requests are hardest to respond to consistently?”

When a buyer names a problem, do not immediately present your solution. First, slow down:

- “Could you give me a recent example?”
- “How long has that been happening?”
- “Who spends time dealing with it?”
- “What have you tried so far?”
- “Is this an occasional nuisance or something that affects the way you work?”

The buyer may reveal that the apparent problem is actually a training issue, an unclear responsibility, a supplier limitation or a process that should be simplified before new software or a new service is considered.

Stage 3: Implication questions — understand the consequence

Implication questions trace the effect of an agreed problem. Used well, they help both parties understand why a change might be worthwhile. Used badly, they become fear-based selling. Keep them grounded in the buyer’s own experience.

Explore a logical chain

Start with the specific difficulty. Then follow its practical effects, one step at a time.

Impact area	Questions to adapt
Financial or resource impact	“What does that delay mean for staff time, overtime, repeat work or avoidable cost?” “How do you currently estimate the cost of correcting it?”

Impact area	Questions to adapt
Operational impact	“What has to wait while the team fixes this?” “What happens to a job, order or client handover when the information is late?”
Customer impact	“What does the customer experience when this happens?” “How does the team recover when a commitment cannot be met?”
Strategic impact	“What work are you unable to prioritise while this continues?” “How does this affect the service level or business goal you have set?”

Ask about numbers carefully

Numbers can make a problem clearer, but they can also create false precision. Ask for the source and treat estimates as estimates.

Instead of saying, “This must be costing you £50,000 a year,” ask:

“Do you have any way of estimating how often this happens and the time or direct cost involved? If not, would it be useful to observe it for a short period before deciding?”

Do not convert saved minutes into guaranteed revenue, profit or payroll savings. A business may gain useful capacity without reducing cost or increasing sales. The buyer should decide what a credible improvement would mean in their context.

Build an implication chain

A chain helps a buyer consider an issue beyond the first inconvenience.

1. “How often does the information get missed at handover?”
2. “When it is missed, what does the team have to do to put it right?”
3. “What work is delayed while that happens?”
4. “What does the client or customer experience?”
5. “If this carried on through a busy period, what would become difficult?”

Stop when the buyer has explained enough. The purpose is clarity, not piling up imagined risks.

Stage 4: Need-payoff questions — let the buyer define value

Need-payoff questions move from the problem to a better way of working. They are strongest when they use the buyer's own language and connect to a consequence already discussed.

Potential value	Questions to adapt
A smoother process	"If the handover were clear first time, what would that free your team to focus on?" "What would a reliable next step look like for the person doing the work?"
Less rework	"If errors were caught earlier, what would change for the team and customer?" "Which checks would still need to stay in place?"
More useful capacity	"If this took less administration, where would the saved attention be most useful?" "What would the team choose to do better or sooner?"
A clearer decision	"What would you need to see before you could judge whether a change is worthwhile?" "How would you decide that a trial had been successful?"
A strategic priority	"If this constraint were reduced, which existing priority would become easier to deliver?"

Avoid putting benefits in the buyer's mouth. "Wouldn't it be great if we doubled your revenue?" is not a discovery question. A more responsible version is: "If the bottleneck reduced, what would change, if anything, in your ability to serve the right customers?"

Bridge to your offer

Once the buyer has described a useful outcome, summarise it before presenting anything:

"You have said the main issue is missed information between booking and site visit. It creates follow-up calls and sometimes a poor customer experience. You would value a simple way for the office and engineer to see the same agreed job details, while keeping a person responsible for exceptions. Is that an accurate summary?"

Only then explain the relevant capability. Keep it narrow. State assumptions and exclusions. For example: “Based on that, a scoped review of the enquiry-to-job handover may be useful. I would first need to confirm the systems involved, who may access the information and whether a simpler process change would solve it.”

A complete SPIN conversation: fictional example

Scenario: Northfield Heating Services is a fictional small heating and maintenance firm. It receives enquiries by phone, web form and email. An operations manager is exploring whether its quotation and booking handover could be improved. The dialogue is an illustration, not a client record or a promise that any system will produce a particular result.

Situation

Seller: “Before we discuss any possible changes, could you talk me through what happens from a new enquiry to a booked visit?”

Operations manager: “The office takes the enquiry, checks a spreadsheet and sends details to the engineer. Some jobs need a quote first.”

Seller: “Who updates the spreadsheet and who decides whether an enquiry needs a quote, a visit or a call back?”

Operations manager: “Usually one of two office coordinators. The engineers sometimes ring in with extra details after a visit.”

Seller: “What prompted you to look at the process now?”

Operations manager: “We are busier at certain times of year and the team feels they are chasing information.”

Problem

Seller: “Where does the process become most difficult on a busy day?”

Operations manager: “A message may be in an email, a note on the system and a text from the engineer. The coordinator then has to work out which version is current.”

Seller: “What happens when the detail is unclear?”

Operations manager: “Someone rings the customer or engineer again. It is not every job, but it creates avoidable calls and a few booking errors.”

Seller: “Have you tried a different way of capturing the information?”

Operations manager: “We added fields to the spreadsheet, but people still use different wording and some urgent jobs bypass it.”

Implication

Seller: “When a booking error happens, what is the practical effect?”

Operations manager: “An engineer might arrive without the right information, or the customer may expect a time that has changed.”

Seller: “What does the office team have to do then?”

Operations manager: “They apologise, find out what happened and rearrange things. It can interrupt other bookings.”

Seller: “During your busy season, what gets harder if those interruptions increase?”

Operations manager: “The team is already trying to respond quickly. More chasing means we are less certain every customer has had a clear update.”

Need-payoff

Seller: “If the office and engineer had one agreed view of the job details and a clear route for urgent exceptions, what would that allow the team to do differently?”

Operations manager: “We could confirm bookings with more confidence and spend less time checking which message is right.”

Seller: “What would you need to see before you would consider a change worthwhile?”

Operations manager: “It would have to work with the way engineers actually communicate, be simple for the office and not make urgent jobs slower.”

Seller: “That gives us useful criteria. The next sensible step may be to map a small number of recent jobs, including an urgent one, and identify where a process change or a simple system improvement would help. I would not recommend a tool until we have checked those details.”

The seller has not promised savings, claimed a result or forced a feature demonstration. They have helped the buyer define the current situation, the problem, the consequence and the conditions for a credible next step.

Techniques for deeper, more focused discovery

Use a problem stack

Buyers often mention several problems at once. Do not try to solve everything in one meeting.

1. List the issues you heard in neutral language.
2. Ask: “Of those, which has the greatest effect on the team or customer at the moment?”
3. Explore that issue through implication and need-payoff questions.
4. Keep secondary issues in your notes for a later conversation or a separate scope.

This prevents a proposal becoming a vague answer to five different problems.

Use contrast questions

Contrast questions make the gap between today and a better state visible without claiming a particular result.

- “You said two people often check the same information. In an ideal process, what would happen instead?”
- “At the moment, a quote can wait for a clarification. What would a good customer experience look like from first enquiry to a confirmed next step?”
- “Which part of this would you want to keep exactly as it is, even if other steps changed?”

The last question is important. A buyer may value a manual check, personal contact or approval step that a seller might otherwise remove too quickly.

Use experience-based questions truthfully

Do not imply that you have clients, results or industry evidence that you do not have. If you have direct, relevant experience, say only what is true and anonymised where necessary.

If you do not have that experience, use a neutral question instead:

“Businesses with several handovers sometimes find that version control becomes difficult. Is that relevant here, or is your situation different?”

The buyer can confirm, correct or reject the hypothesis.

Keep a decision map in a group conversation

When a meeting includes an owner, operations lead, finance contact and users, their priorities may differ. Prepare for this rather than directing every question to the most senior person.

Role or perspective	A useful question
Day-to-day user	"Could you show or describe the point where this normally becomes difficult?"
Process owner	"What outcome are you accountable for, and what gets in the way?"
Finance or commercial lead	"What costs, commitments or approval criteria need to be understood before a change?"
Business owner	"How does this relate to the priorities you have set for the business?"

At the end, summarise the different views: "The operations team needs less rework, finance needs the cost and scope to be clear, and the owner needs to protect customer service. Have we missed anything?"

Handling common moments without losing the conversation

When the prospect gives very short answers

1. Narrow the question. Replace "Tell me about your process" with "When a new enquiry arrives after 4pm, what happens next?"
2. Give a reason for asking: "I am trying to understand whether the delay sits at the enquiry stage or the handover stage."
3. Respect the boundary: "If that is not something you can discuss today, we can keep this at a high level."
4. Offer a choice: "Would it be more useful to look at a recent example, or should we first agree who else needs to be involved?"

Do not treat reserved answers as a challenge to overcome. The person may be busy, cautious, not the right owner or simply not ready.

When the prospect wants features or price immediately

Acknowledge the question without dodging it:

“I am happy to explain the typical options and price basis. To avoid showing you irrelevant features or giving you an unsafe estimate, may I first ask what you need the change to achieve and what the current process looks like?”

If a public price or starting scope is available, state it accurately. Then explain what affects the final scope. Never use discovery as a reason to withhold essential limitations.

When several stakeholders have different concerns

Name the difference, invite each perspective and avoid assuming agreement.

“It sounds as though the office team is concerned about repeat work, while the owner is concerned about service consistency. How do you normally decide between speed, cost and customer experience when those priorities compete?”

If a key person is absent, do not pretend a decision has been made. Agree what needs to be checked and who will confirm it.

When the prospect jumps between possible solutions

Reset gently:

1. “Before we compare options, what are you trying to improve?”
2. “What would success look like in practical terms?”
3. “What have you tried before, and what did not work as expected?”
4. “What criteria will you use to compare any option?”

Then assess whether your offer meets those criteria. A feature comparison is more useful after the buyer has a decision frame.

Question libraries you can tailor

Use these as starting points. Replace the bracketed text with your own context. Keep questions you can answer with a sensible next step.

First conversation with a new prospect

Stage	Questions
Situation	“What are you using now for [process]?” “How does work move from [starting point] to [outcome]?” “Who owns this day to day?” “What prompted you to look at it now?” “Which systems, suppliers or team handovers are involved?”
Problem	“Which part of the current approach is least reliable?” “Where does the team have to chase, duplicate or correct work?” “What feedback do customers or colleagues give you?” “What requirement is not being met?” “What have you already tried?”
Implication	“What happens to service or delivery when that occurs?” “What other work gets delayed?” “Who has to resolve it?” “What evidence do you have about the cost or time involved?” “What becomes harder during a peak period?”
Need-payoff	“If the bottleneck reduced, what would improve?” “What would a workable process look like for the people using it?” “Where would the team use recovered attention?” “What would you need to test before changing anything?” “How would you judge whether the change was worthwhile?”

Conversation with an existing customer

An existing customer is not automatically ready for more work. Start with their experience of the current service and decide whether an additional conversation is relevant.

Stage	Questions
Situation	“How has the business or team changed since we last reviewed this?” “Which parts of the current service are used most?” “What new priorities have appeared?” “Who now relies on this process?” “What has stayed the same?”

Stage	Questions
Problem	“Where does the current arrangement no longer support you well?” “What are you still handling manually?” “Which new requirement is not covered?” “What has been frustrating or unclear?” “What would you rather not change?”
Implication	“What is the effect of that gap on the team, customer or schedule?” “What happens if it remains as it is?” “What workaround are you using?” “Does it create a cost, delay or risk that you can evidence?” “Who else is affected?”
Need-payoff	“If the scope were extended, what would it enable?” “What would need to stay within the agreed boundaries?” “What level of support would be useful?” “What would make the change worth the effort?” “How would you decide whether to proceed?”

Turn discovery into an honest next step

A strong discovery call ends with a clear decision, not a vague promise to “circle back”. Choose only an outcome that matches the evidence.

If you have learned...	A responsible next step
A defined problem, an appropriate buyer and enough facts to scope work	Send a concise proposal that states deliverables, exclusions, assumptions, price basis, responsibilities and acceptance criteria.
A plausible problem but important gaps in process, data, access or stakeholder views	Propose a paid or unpaid assessment only if it has a defined purpose and output. State what it will not establish.
A problem that is better solved by a process change, training or another supplier	Say so. A useful referral or a short explanation may be more valuable than forcing your offer.
No meaningful problem or no appetite to act	Agree to stop or to reconnect only if there is a genuine future reason. Do not add someone to a marketing sequence without the appropriate basis and notice.

Follow-up message template

Adapt this to the facts; do not present a fictional call summary as though it happened.

Subject: Summary and agreed next step for [process]

Hello [Name],

Thank you for explaining how [process] currently works. My understanding is that [plain-language problem] leads to [agreed practical consequence]. You said that a useful improvement would be [buyer's desired outcome], provided that [condition or boundary].

The agreed next step is [specific action, owner and date]. This is not a commitment to a solution or price until [missing information or scope] is confirmed.

If I have misunderstood anything, please correct me.

Kind regards, [Name and business contact details]

Use outreach lawfully and respectfully

Discovery may begin with an inbound enquiry, a referral or permitted outreach. The rules for electronic marketing are not identical for every type of business contact.

The ICO currently explains that companies and LLPs are generally **corporate subscribers** under PECR, while sole traders and some partnerships are **individual subscribers**. The electronic-mail rule differs: an organisation can email or text a corporate body, but marketing electronic mail to individual subscribers normally requires specific consent unless the narrow “soft opt-in” conditions apply. UK GDPR still applies when you process personal data, such as a named work contact. The ICO also says this guidance is under review following changes made by the Data (Use and Access) Act. Recheck the current guidance before a campaign and take professional advice for your circumstances. [1](#)

Before sending a marketing message, take these practical steps:

1. Identify the business type rather than guessing from the email address.
2. Check whether you are using a named person's data and document an appropriate UK GDPR basis and privacy information where required.
3. Be truthful about who you are and why you are writing.
4. Include a valid way to opt out or object, and act on it promptly.
5. Keep a suppression or “do not contact” record and screen future activity against it.
6. Do not assume a LinkedIn connection, publicly displayed address or one previous conversation gives blanket marketing permission.

This is general business education, not legal advice or a compliance guarantee. Telephone, automated-call, messaging-platform, tracking and cookie rules can raise additional requirements. Use the ICO's current guidance and obtain suitable advice before acting.

Recording, notes and sensitive information

A call recording can help with practice, but only use it with appropriate permission and a clear purpose. Explain what will be recorded, who can access it and how long it will be kept. If recording is not appropriate, take concise notes instead.

Keep discovery notes proportionate. Do not ask prospects to email passwords, unnecessary personal data or confidential files simply to make a sales conversation easier. Store notes in the business system you have approved for the purpose, limit access and remove information you no longer need in line with your own policies and obligations.

A 30-day practice plan

This is a learning plan, not a promise of more sales, faster decisions or a particular conversion rate. Adjust it to your working pattern. Obtain permission before recording or sharing any conversation, and use a fictional role-play where real calls are not suitable.

Days	Focus	Practical activity	Review question
1–3	Learn the structure	Read the four stages. Create five candidate questions for each stage for one offer. Write a short description of the process you sell into.	Which questions are genuinely useful, and which are just filler?
4–5	Observe your current habit	Review notes from recent conversations, or listen to a permitted recording. Mark where you asked about situation, problem, implication and need-payoff.	Where did you present a solution before enough evidence existed?
6–7	Practise safely	Role-play a short discovery call with a colleague. Ask them to give brief, unclear or feature-focused answers.	Did your follow-up questions feel natural?
8–10	Improve situation questions	Use fewer, more relevant context questions. Prepare before each conversation.	Did I learn the people, process and trigger without conducting an interrogation?

Days	Focus	Practical activity	Review question
11–14	Improve problem questions	Ask for a recent example, the current workaround and what has already been tried.	Can I name the buyer's actual problem in their words?
15–17	Explore implication	Build one short consequence chain from a real, agreed issue. Ask for evidence before using numbers.	Did I understand the impact without inventing urgency?
18–21	Improve need-payoff	Ask buyers to describe a useful future state and their decision criteria.	What would they need to see before they could judge a change?
22–25	Integrate the conversation	Use all four stages in a live or role-play conversation, but let the order flex when the buyer brings up an important issue.	Did it remain a human conversation rather than a checklist?
26–28	Get feedback	With permission, review a call with a manager, colleague or coach. Pick one behaviour to change.	What did I do that made it easier or harder for the buyer to be candid?
29–30	Set the next habit	Compare your current notes or call structure with day one. Choose one repeatable preparation and review practice.	What will I keep doing, stop doing and test next?

Measure learning without making false promises

Track measures that help you improve the conversation. Do not assume that a better question automatically causes a sale, a larger deal or a shorter sales cycle.

What to observe	A practical way to record it
Preparation	Did you identify the likely process owner, purpose and two relevant questions before the call?
Listening quality	Did you leave room for answers and accurately summarise the buyer's words? Use a self-comparison, not a universal target.
Question depth	Did you move beyond background facts to a specific problem and consequence where appropriate?
Information quality	Can you identify the process, pain point, current workaround, decision criteria, stakeholders and uncertainty?
Next-step quality	Was the next action specific, mutually understood and proportionate to the evidence?
Commercial outcomes	Track conversations, qualified opportunities, proposals, decisions and work won with clear dates and denominators. Review patterns over time; do not draw a conclusion from a handful of calls.

A declined opportunity can still be a successful discovery conversation if both parties avoided an unsuitable commitment and learned something useful.

Workbook: prepare, capture and act

Print these pages or copy them into your approved notes system. Do not record confidential information that you do not need for the next step.

Pre-call planner

Organisation / contact:

Date / meeting purpose:

What I can verify from public information:

What I need to understand, rather than assume:

Likely process owner / other stakeholders:

My concise, truthful description of the offer:

Boundary or exclusion to explain if relevant:

Situation question 1:

Situation question 2:

Possible problem hypothesis — to test, not assert:

What a useful next step could be:

SPIN call record

Situation — how does the process work now?

Problem — what is not working, and what is the current workaround?

Implication — what happens as a result, and what evidence is available?

Need-payoff — what improvement matters to the buyer, and what must remain true?

Exact words worth using in a follow-up:

Unknowns, assumptions or people still to involve:

Decision / next step:

Owner: Date:

Build your question library

Choose one offer and write at least five questions for each stage. Keep the reason for the question visible, so you can remove questions that do not support a decision.

Stage	My question	What I need to learn	When it is appropriate
Situation			
Situation			
Situation			
Situation			
Situation			
Problem			
Problem			
Problem			
Problem			
Problem			
Implication			
Implication			
Implication			
Implication			
Implication			
Need-payoff			
Need-payoff			

Stage	My question	What I need to learn	When it is appropriate
Need-payoff			
Need-payoff			
Need-payoff			

After-call reflection

One question that opened up a useful answer:

One moment where I spoke too soon or made an assumption:

One fact I need to verify before making a recommendation:

One behaviour I will practise on the next call:

When I will review it:

Your next practical step

Before your next relevant conversation, do three things: prepare two situation questions, choose one possible problem to test without assuming it is true and decide what an honest next step could look like. After the conversation, complete the call record while the details are fresh.

Better sales discovery does not remove the need to deliver well. It gives you a clearer basis for deciding whether to recommend, assess, quote, refer or stop. That is more useful to a small business than a polished pitch built on assumptions.

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References

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