Consultative Discovery for SaaS Sales

Public workshop · Live online

Tuesday 3 November 2026 · 09:30–14:30 GMT · 4 training hours

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Workshop focus

- Open a discovery call
- Probe beyond the first answer
- Check the buyer's priorities
- Agree a useful next step

SaaS Sales Training

Practical people skills for tech teams

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Workshop overview

Practise opening a discovery call about your own SaaS product, following the buyer's answers and agreeing what to do next. Replay the moment you usually find hardest.

Workshop focus

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Workshop practice

In a group of up to four, you take turns practising situations agreed during your training needs analysis. A peer or your facilitator gives you feedback on what they saw and heard. You try the difficult part again.

Preparation and follow-up

Before the workshop

For a manager-sponsored place, we first ask your manager what they want the training to help you do. In a short, private training needs analysis (TNA), you tell us about your product or solution, the people you work with and a conversation or task you want to handle better. You and your facilitator agree what the group can use for practice.

Choose an opening request you hear from buyers and a point where discovery tends to stall. Share the buyer's words and one question you usually ask.

Bring · Your agreed buyer brief and an anonymised discovery challenge you are comfortable discussing with peers.

After the workshop

Revise your question route and buyer summary using the feedback. Try your revised opening and follow-up on your next call. Record what you learned and which assumption the buyer confirmed or corrected.

Your individual report reviews question design, assumption checking and summary quality in the written work, alongside listening and follow-up behaviours observed during workshop role play. Your 30/60/90-day action plan sets 2 workplace actions and review criteria.

Workshop agenda

09:30–10:00	**Open a discovery call** A peer playing your buyer opens with a request about your product. Respond as you would at work. Replay the first minute with a different opening question. **Feedback** · The buyer tells you which opening made it easier to explain what prompted the call.
10:00–10:45	**Follow the buyer's answer** Ask the buyer to walk you through the last time the issue occurred. Pick up one detail in their answer and ask what happened next. **Feedback** · Your observer quotes the follow-up that revealed new information and flags a detail you could have pursued.
10:45–11:30	**Uncover what makes the problem worth solving** Lead a short discovery call using your agreed buyer brief. Find out who feels the effect, what they do today and what a better outcome would look like. **Feedback** · The buyer checks your account of the problem. Peers point to any conclusion you reached before asking for evidence.
11:30–12:30	**Lunch break** Optional 10-minute 1-to-1 video check-in with your facilitator to review feedback and focus your afternoon practice.
12:30–13:15	**Test priorities and assumptions** Ask the buyer what would make this change worth doing now, who else has a say and whose view you have yet to hear. Summarise their priorities aloud. **Feedback** · The buyer corrects anything you missed and identifies the question that helped them explain a trade-off.
13:15–14:00	**Replay the difficult exchange** Return to the point in your call where the answer was vague or you started pitching. Try a more specific follow-up and give the buyer time to answer. **Feedback** · Observers compare the two attempts and identify what you learned the second time that you can use in the sale.
14:00–14:30	**Close with a buyer-checked next step** Recap the buyer's priorities and agree one next action. Brief a colleague on what the buyer confirmed and what still needs checking. **Feedback** · The buyer checks the recap for accuracy. The colleague tells you whether they know who will do what next.

Free workshop resources

Before your next discovery call, use the checklist to decide what you need to learn about the buyer and which questions to ask.

- SaaS Discovery checklist
- SaaS Discovery e-learning

Browse all checklists