

VIDEO DISCOVERY CALL KIT

12 questions to uncover the business problem, quantify its value, and stop competing on price.

A practical field guide for commercial videographers and production studios.

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START HERE

Before you quote the video, diagnose the business

Most video inquiries begin with a deliverable:

"How much for a two-minute brand video?"

If you answer with a number, the client can only compare you on price, gear, turnaround time, and production quality.

A discovery call changes the conversation. Instead of immediately quoting the requested video, you uncover:

- Who the video needs to influence
- What action the client wants that audience to take
- What is preventing that action today
- What the problem is costing the business
- What solving it would make possible

THE RULE

Do not send a custom proposal before discovery.

Your goal is not to pitch. Your goal is to understand the client well enough to determine whether video is the right solution.

This kit gives you a practical 30-minute structure and 12 questions distilled from the complete Discovery framework, plus a call notes sheet, a quick client-fit check, and two follow-up messages.

BEFORE YOU BEGIN

Built for inbound opportunities

Use this kit when a potential client has already contacted you about a project.

INBOUND: USE THIS KIT	OUTBOUND: LEAD WITH CONTEXT
A client has submitted an inquiry, requested a quote, or agreed to discuss an active project. Use the questions in this guide to diagnose the business before proposing a solution.	For a cold or lightly engaged prospect, begin with a relevant observation, benchmark, or example. Earn the conversation before asking deeper Discovery questions.

The complete Video Sales Playbook includes a separate outbound Discovery workflow, scripts, and an annotated call transcript for prospects who agree to speak with you.

PREFER TO COMPLETE THIS DIGITALLY?

Make your own editable Google Docs copy.

Type directly into the worksheets while keeping this PDF beside you as a call guide.

OPEN THE EDITABLE WORKSHEET

The button opens a private copy prompt. A Google account is required.

USE THE KIT IN THREE PASSES

- 01 Prepare. Complete the 10-minute research before the call.
- 02 Diagnose. Follow the 30-minute map and capture the client's own words.
- 03 Decide. Score the opportunity and send the appropriate follow-up.

PREPARE

The 10-minute pre-call research

If you cannot find an answer quickly, move on. This is preparation, not a full audit.

01 What do they sell, and what does it cost?

Product or service

Typical customer value

02 Who buys it?

Ideal customer

03 How do prospects take the next step?

Current conversion action

04 Who are their main competitors?

Competitors

05 How are they currently using video?

Assets and placement

Prepare these three blanks before the call

AUDIENCE	Who needs to see the video?
ACTION	What should they do next?
PLACEMENT	Where will the video live?

30 MINUTES

The discovery map

Lead the structure, but let the conversation move naturally between stages.

STEP	STAGE	TIME	PURPOSE
01	Open	2 min	Set the agenda and shift from production to business.
02	Situation	5 min	Understand the audience, action, placement, and current process.
03	Problem	5 min	Find the business friction behind the inquiry.
04	Impact	10 min	Translate the problem into lost money, time, or capacity.
05	Need	5 min	Clarify what solving the problem would unlock.
06	Next step	3 min	Check investment alignment and agree on what happens next.

Use this opening

"Thanks for reaching out about [requested video]. Before we discuss production, I would like to understand the business behind it: who it needs to influence, what result you want, and what is getting in the way today. That will help us determine whether we are the right fit and build the right solution if we are. Does that sound good?"

Talk less than the client. Do not rush to fill silence.

Your job is not to mechanically ask every question. Your job is to leave the call with specific information about the problem, its impact, and the desired outcome.

THE 12 QUESTIONS

Situation

Understand what the video must do before discussing how it will look.

01 WHO IS THE AUDIENCE?

"When the right person watches this video, who exactly are we speaking to?"

Write down the specific buyer, not a broad demographic.

Audience: _____

02 WHAT SHOULD THEY DO NEXT?

"The moment the video ends, what do you want that person to do?"

Look for a concrete action: book, buy, apply, inquire, visit, donate, or share.

Action: _____

03 WHERE WILL THE VIDEO LIVE?

"Where will this video appear, and what kind of traffic will see it there?"

Placement changes the job of the video. A homepage and a sales presentation do not solve the same problem.

Placement: _____

04 WHAT IS HAPPENING TODAY?

"Without this video in place, how are you currently getting [audience] to [action]?"

This exposes the process the new asset must improve or replace.

Current process: _____

THE 12 QUESTIONS

Problem and impact

Move from vague frustration to an observable, meaningful business cost.

05

WHERE IS THE FRICTION?

"What is holding [audience] back from taking [action] today?"

Move beyond production complaints to the business consequence.

Problem: _____

06

WHAT DOES IT LOOK LIKE IN NUMBERS?

"When you say the current process is not working, what does that mean in numbers?"

Use conversion, inquiries, cycle length, tickets, applications, or hours.

Current metric / desired metric: _____

07

WHAT IS LOST EACH WEEK?

"How much time, money, or capacity would you estimate the team loses to this problem each week?"

Let the client think. Do not answer for them.

Weekly impact: _____

08

WHAT IS THE HIDDEN COST?

"Besides the direct loss, what else is this costing the business?"

Explore staff time, outside fees, delayed deals, confusion, stress, or missed opportunities.

Hidden cost: _____

09

WHAT DOES THAT BECOME OVER TIME?

"When you extend that across a month or a year, what does the total impact look like?"

Use the client's assumptions. Do not invent an ROI claim.

Monthly impact / annual impact: _____

THE 12 QUESTIONS

Need and alignment

Shift from pain to the outcome the client wants, then check whether the opportunity is viable.

10 WHAT WOULD SOLVING IT UNLOCK?

"If this problem were removed, what would that make possible for the business over the next 12 months?"

Listen for growth, capacity, speed, confidence, or expansion.

Business outcome: _____

11 WHAT WOULD IT GIVE BACK TO THE TEAM?

"If the video handled this part of the process, what would that give back to you and your team?"

Time, attention, energy, and confidence can be valuable outcomes too.

Team outcome: _____

12 IS THE INVESTMENT ALIGNED?

"Projects designed to solve a problem of this size typically fall within [range]. Does that align with what you had in mind?"

Give a range, then stop talking. Do not immediately explain or discount it.

Range discussed: _____

Client response: _____

DO NOT NEGOTIATE AGAINST YOURSELF

After stating the range, let the client respond first.

WORKSHEET

Discovery call notes

Capture the opportunity in one page. Use short phrases, numbers, and the client's own words.

Client: _____

Date: _____

Company: _____

Contact: _____

Requested deliverable _____

AUDIENCE

Who needs to be influenced? _____

ACTION

What should they do after watching? _____

PLACEMENT

Where will the video live? _____

CURRENT PROCESS

How are they producing the result today? _____

PROBLEM

What is not working? _____

EVIDENCE

What numbers or examples prove the problem exists? _____

IMPACT

What is it costing in money, time, capacity, or opportunity? _____

NEED

What would solving it unlock? _____

Investment range: _____

Next step: _____

AFTER THE CALL

Quick client-fit check

Score each statement from 0 to 2. This prevents weak opportunities from consuming hours of proposal work.

CRITERIA	0	1	2
Their available investment can support profitable work.	☐	☐	☐
Video can genuinely help solve the stated problem.	☐	☐	☐
They acknowledge that the problem exists.	☐	☐	☐
They have a reason to address it now.	☐	☐	☐
They treat you as a strategic partner, not only a vendor.	☐	☐	☐
TOTAL			/10

Interpret the score

8-10	Proceed. Build the next step around the problem, impact, and desired outcome.
5-7	Clarify. Important information is missing. Resolve it before investing time in a proposal.
0-4	Walk away. A proposal is unlikely to fix a weak opportunity.

This simplified scorecard is adapted from the five criteria in the complete Client Fit Evaluator included in Video Sales Playbook.

AFTER THE CALL

Two follow-up messages

Keep the next step direct. Do not hide a weak fit behind a proposal.

GOOD FIT**Subject: Next steps for [Company] video strategy**

Hi [Name],

Thank you for walking me through the situation today. Based on what you shared, the central opportunity is to help [audience] overcome [problem] so they can [action/outcome].

I believe video could be the right tool for this. The next step is to walk you through the approach and investment options. You can choose a time here: [link].

Best,
[Your name]

NOT A FIT**Subject: Following up on [Company]**

Hi [Name],

Thank you again for the conversation. After reviewing what you shared, I do not think a custom video project is the right next step for this problem at the moment.

I would rather be upfront than recommend an investment that is unlikely to move the needle. Based on the call, I suggest starting with [helpful next step or resource].

I appreciate your time, and I would be happy to stay in touch.

Best,
[Your name]

KEEP THIS BESIDE YOU

Five rules for a better discovery call

01

Do not interrogate

Use phrases such as 'Help me understand' and 'Walk me through' so the call feels conversational.

02

Ask for specifics

Replace vague words such as 'better' or 'more' with numbers, examples, or observable behavior.

03

Stay with the problem

Do not prescribe a solution before the client has explained its impact.

04

Do not interrupt silence

The most valuable answers often come after the client pauses to think.

05

Only promise what video can influence

Strong positioning starts with an honest diagnosis.

THE STANDARD

Leave the call knowing the problem, its impact, the desired outcome, and whether the client is qualified.

DISCOVERY IS ONLY THE FIRST STEP.

This free kit is a condensed introduction to the Discover stage of Video Sales Playbook.

The complete Playbook shows you how to turn what you uncover into a profitable offer, value-based price, persuasive proposal, and signed contract.

INSIDE THE COMPLETE PLAYBOOK

- Full inbound and outbound discovery scripts
- Two complete, annotated call transcripts
- Detailed Client Fit Evaluator
- Master Offer Builder and Value Pricing Calculator
- 7-Slide Proposal Deck
- Objection Cheat Sheet and Ghosting Protocol

DISCOVER. BUILD. PRESENT. CLOSE.

Get the complete system at

videosalesplaybook.com