



The Discovery Call Playbook: How to Sell Business Intelligence (BI) Services with Confidence

The Strategic Partner's Guide to Co-Selling
Business Intelligence Services

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Introduction: **Why** BI Services Are the Right Move Now

Whether you're a RevOps agency, consultant, marketing agency, or professional services firm – you know that the stakes have gotten higher. Your clients expect more than just performance execution. They want strategic insights, proactive guidance, and full visibility into how efforts are impacting business outcomes.

That's where Business Intelligence (BI) Services come in.

With Databox, Solutions Partners have the opportunity to expand beyond reporting and deliver high-value, insight-driven services that increase client trust, retention, and revenue. This playbook shows you how.

Whether you're just starting to sell analytics or want to scale a new service line, this guide gives you the exact steps to run high-impact discovery calls that uncover real client pain points and tee up advanced services.

"We've had tremendous success stories helping organizations go from 2% bottom line up to 20% bottom line, doubling the size of the organization through having solid business practices revolving around metrics that drive value.

And Databox has helped us do that."

– Andrew Wood, Principal, Wood Consulting Group



The Opportunity:

Co-Selling BI Services

With Databox, if you're [a Solutions Partner](#), you don't have to go it alone. First, you and your Partner Manager need to make sure the client is a good fit and that we can help them achieve their goals. To do that, we have a few options:

Option 1: You Lead Selling, We Coach

If you're not already comfortable running effective client discovery calls, we'll help you get there. This playbook is intended as a reference for you to learn discovery call best practices that will help you sell advanced analytics services or "BI Services" to your clients alongside Databox. Your Partner Manager can review this guide with you and practice different sections to help get you comfortable running discovery calls.

Option 2: We Take the Lead on Sales (For a While)

This is where we run discovery calls with your clients, with you present. Some partners find this approach helpful so that they can learn how to do this more effectively themselves in the long run. Your Partner Manager won't do this forever, but many partners find this helpful for the first 2-3 deals we work together.

Option 3: We Run Sales Cycles Behind the Scenes

For experienced sellers, your Partner Manager can work directly with you (without the client) to ask you the discovery questions and ensure a good fit for you and for Databox. Based on what you share, we'll recommend how you can proceed with the client OR that we offer a product demo with the Databox Technical Sales Consulting team.



Step 1: **Identify** the Right Clients

Before we get into the mechanics of running a client discovery call, it's important to remember **not ALL of your clients and/or prospects are going to be ready for advanced analytics or BI as a Service.**

For example, you might discover that a client isn't ready and they just want you to help them analyze one part of their business. Maybe they just want help improving some key marketing metrics, and they're using the request as a way to make sure your work is producing ROI.

But, there will also be clients and companies who are much more strategic. They use data to make both short and long-term decisions. They might highly value one place where they can monitor, analyze, track goal progress, hold their teams accountable, report out, benchmark, forecast, etc their performance. These are the ones that are more likely to be a good fit for BI as a Service.



BI Services Qualification Checklist

To find clients who would be interested, start by reviewing your client base, asking yourself (current Partners should do this with their Partner Manager):

- ✓ Are they measuring part of their business beyond marketing/sales performance?
- ✓ How savvy are they with data? (analysis, goal setting)
- ✓ Do they have goals, financial models, or an annual plan built?
- ✓ Are they already making decisions based on data?
- ✓ Do you think they'd be interested in a more comprehensive view of their performance?
- ✓ Do you think they'd benefit from tracking goals across their whole team in one place?
- ✓ Do they need to report results to internal stakeholders or an external board of directors?
- ✓ Do they practice transparency to empower their team, or are they top down and guarded?
- ✓ Would they value Slack or email alerts for the metrics they're responsible for, and their direct reports (or their direct reports) are responsible for?
- ✓ Would they be interested in building their own dashboards or reports?

If the answer to all or most of these questions is “yes,” then you’re on the right track.

If not, then BI Services probably aren't the right fit for them yet. You'll need to start with more basic reporting to show them the value of your work and expand the relationship over time (we can help here, too!).



Step 2: **Prepare** for the Discovery Call

You've identified a great-fit client. Now it's time to run masterful discovery calls with those clients/prospects.

There are likely two scenarios:

- Engaging existing clients, and
- Selling new prospects

This section covers how to engage with your current clients. For prospects, you can use this conversation flow, but you'll want to modify the opening to set the stage.

Identify Your Objective for the Call

Identify client pain points and opportunities for advanced analytics/BI support, while framing BI Services as a natural next step in the relationship.

Pre-Call Checklist:

Before the call, you'll want to review:

- ✓ **Past work done** for the client (metrics, campaigns, projects, or systems managed).
- ✓ **Existing reporting structures**, tools, or dashboards in use.
- ✓ **Client's strategic priorities**, if known—especially beyond marketing/sales.
- ✓ **Predictability Index**, as a diagnostic resource to identify gaps or opportunity areas; if you haven't done the [Predictability Index Assessment](#) with a client, it can be a helpful next step in the conversation.

Step 3: **Run** the Discovery Call

1. Open with Purpose (2-3 minutes)

Sample Script:

"Based on some things I've observed about your company beyond just your [marketing/sales] teams, I have some suggestions on how you could operate more effectively based on our work with other firms. Specifically, I've observed that when it comes to setting goals, tracking performance, gaining cross-functional performance visibility and collaboration and future planning, there are some areas of improvement."

- Tie Down Question > **Do you agree that these are areas of improvement?"**

"Many of our clients are starting to ask deeper questions—about business predictability, goal and key initiative accountability, forecasting, and how their teams use data to make smarter decisions."

- Tie Down Question > **Is this something you've been thinking about at all?"**



2. Uncover Broader Needs (15-30 minutes)

Strategic Alignment & Cross-Functional Needs

- “Are there parts of the business outside of our current scope—like finance, sales, ops, or customer success—where you’d like better visibility into performance?”
- “Do teams across the company have a shared view of the company’s goals and progress towards an annual plan or key priorities?”
- “Is leadership asking for more cross-functional reporting or real-time insights?”

Data Maturity & Decision-Making

- “How would you describe your current level of data literacy across the team?”
- “How confident are people in interpreting data, dashboard, and reports, or is it mostly top-down?”
- “Are decisions typically made with data, or more from gut instinct?”

Tooling, Transparency, and Goals

- “Do you have a centralized place where all metrics and goals are tracked?”
- “How do you currently communicate performance updates—are people getting regular updates via Slack, email, dashboards, or something else?”
- “How are goals cascaded from leadership down to individuals or teams?”

Reporting & Accountability

- “Who do you currently need to report results to— peers, internal teams, investors, a board?”
- “How much time do you or your team spend building reports right now?”
- “What would it mean for your team to get that time back, or to automate more of this?”

Pain / Business Impact, and Expanding Client Buy-In

- “Based on what you’ve shared with me so far, which business metric or metrics are suffering the most, if any?”
- “Who else cares about that (those) metric and the impact this is having?”
- “If they were here now, what do you think they would add to the conversation?”
- “Do you think it’s worthwhile to include them in a follow up after today?”



3. Positioning BI Services (5-10 minutes)

Transition Line:

"Based on what you've shared, it sounds like there may be some real opportunity to centralize your data, automate reporting, and give your team more real-time visibility."

Then offer a brief education on what BI Services look like:

Talking Points:

- "This isn't about replacing your systems—it's about **connecting them** in one place where you can see performance holistically."
- "We can help you track company-wide goals, create team-level dashboards, and automate Slack/email alerts to keep people aligned, accountable, and on-track."
- "Our clients who do this tend to see a big boost in **accountability, transparency, and decision-making speed.**"



4. Test for Interest & Recommend Next Step (5 minutes)

Tip: Don't push all four options. Pick the one that feels best aligned based on the conversation and your relationship with the client

Soft Close Options:

- “Would it be helpful if we did a quick assessment of your current setup to identify where the biggest gaps and opportunities are?” [This is where you could use our [Predictability Index Tool](#)]
- “Would you be open to seeing how this could look in practice through a quick Databox demo?” [Work with your Partner Manager to book this]
- “We could spin up a Databox trial for you as a proof of concept—would that be helpful?” [You can create this, but also work with your Partner Manager to keep them informed]
- “If it's easier, we can just outline what this kind of engagement could look like in an SOW—want us to draft that?”



Step 4: Post Discovery Follow-Up

Immediately after the call closes, you can take the following steps.

If the client is a fit:

Step 1:

- Send the calendar invite at the agreed upon time to the influencer/decision-maker + anyone else who will be joining for a follow up.

Step 2:

- Send a Success Plan (template below), summarizing what you covered in the discovery call, where you are in the process of exploring together, and leaving room for any follow ups if needed.

If not quite ready:

- Recommend a lighter reporting approach
- Offer to revisit BI Services after initial wins



Post Discovery Email Template

Subject: Next Steps | [YOUR COMPANY NAME] + [PROSPECT COMPANY NAME]

Body:

Hi [First Name],

As I mentioned, I'm writing a brief recap of what we covered today and confirming next steps.

Recap of Assessment for [COMPANY NAME; PARTNERS SHOULD CUSTOMIZE THIS SECTION BASED ON THEIR CLIENT]

- **Challenges** - The main pain points right now are (1) dealing with dispersed and incomplete data, (2) not being able to get insights fast enough, and (3) not knowing what to do next even if you had that data.
- **Goals** - This matters because you're in the middle of making investment decisions which will impact decisions around growth and profitably
- **Plans** - You've tried doing [previous plan/ course of action] in the past, but it didn't work because [insert why it didn't work or was ineffective]
- **Timeline** - You want to address this now because [why now]
- **Consequences** - If you don't address this, [insert the consequence you learned here]

Anything I'm missing?

Next Steps [PARTNERS SHOULD CUSTOMIZE BASED ON THEIR CLIENT]:

- [Today] Mutual Discovery, Q&A, Recommendations
- [DATE] [Insert the next Step you and your client agreed to coming out of first call]
- [DATE TBD] Databox demo and Q&A for your team
- [DATE TBD] Connect initial data sources, help with initial setup inside of Databox
- [DATE TBD] Confirm that Databox is the right solution for your team
- [DATE TBD] Co-create business case for working together
- [DATE TBD] Sign services and software contracts and get started

If you have any questions about the above, or any other lingering questions, of course let me know. Otherwise, I'm looking forward to [TAKING NEXT STEP YOU AGREED TO WITH CLIENT FROM OPTION LIST ABOVE] with you and [ANYONE ELSE COMING TO THE CALL] on [DATE YOU AGREED TO].

Regards,

[YOUR NAME]



Bonus: Pro Tips for a Great Discovery Call

Pre-Call Prep

Call Duration

Most discovery calls last 30–60 minutes. If it's clear early that a client isn't a fit, feel free to wrap up quickly. It's also okay to schedule a second session if deeper exploration is needed.

Call Flow

- 5 minutes: Rapport building and upfront contracts
- 20–30 minutes: Exploring business goals and challenges
- 5–10 minutes: Recap, recommendations, and next steps

The True Goal

It's not about pushing to the next sales stage. The real objective is to assess:

1. Do they need your company's help?
2. Do they want your company's help?
3. Are they open and able to accept help?
4. Do you want to keep engaging with them?

Running the Call

Opening the Call

Start with light rapport. This doesn't work for everyone, but it does for most. Why? Because if you go right into "business" then you may come off as desperate and hungry just to move a sale forward. That's not the energy we want our sales team giving off.

Rapport-Building Prompts

- Geo: "I saw you're based in [City]—I've been there!"
- Content: "I noticed your recent post on LinkedIn—great point about [X]."
- Mutual Connections: "We both know [X]—small world!"
- Interests: "I saw you're into [Hobby]. I am too."
- Company: "Your company's work in [Area] caught my eye—curious to learn more."

If the strategies above don't suit you, be creative and find one that does!



Running the Call

Setting an Agenda: Use the PALO Framework

To effectively bridge from “rapport” to “business,” you should use the PALO framework. It’s useful because it sets expectations for what you’ll cover on every call, how you’ll use your time, and that you’re going to ask them for an opinion on next steps at the end of the call.

Here’s what it sounds like:

Purpose:

- “The purpose of today’s call is to learn more about what brought you to Databox, your goals and challenges, and see if we can help.”

Agenda:

- “To do that I’ll have a few questions about what you’re working on, and where you would like to get to. I’ll also answer questions you have.”

Logistics:

- “We have 30 mins to cover that today - does that still work for you?”

(Upfront Outcomes Contract):

- “At the end of the call we can decide if we’re a potential mutual fit. If we’re not we can part ways. Will you feel comfortable letting me know if we’re not? ... [PAUSE, LET THEM RESPOND]... OK, me too. If we are a fit, we can open up our calendars to schedule the next steps and discuss who else we’ll need to involve in the decision – sound fair?”

Focus on the Right Problems

Acknowledge what you already know about the prospect, like why they work with you, what they want to achieve, and any “Jobs to Be Done” information you have. Then, help them also see the bigger challenges and broader use cases. It’s critical that you expand their world so that they fully understand the types of challenges we help our customers with.

Post-Call Follow-Through

If they're a fit, book the next step during the call—usually a setup or POC session. Then, send a recap email within 24 hours summarizing:

- What you heard
- Where they are in the evaluation process
- What comes next

Time kills deals, don't let it kill yours. See earlier in this playbook for an example of what a recap email should look like.



Ready to Get Started?

This playbook is just the beginning. Your Partner Manager is available to review discovery calls with you, join live sessions, or help design a scalable BI Services package for your business.

Let's help your clients (and your business) unlock more value from data.

“If you are an agency owner or someone who is reselling services, you've discovered business intelligence like Databox and you do it for yourself to understand your own business... why not help your clients with it too? I think it's a no-brainer.”

– Jeffrey Broger, Founder & CEO, J.J.B. Industries