

Discovery Call

CHECKLIST

0-5 MINUTES

Warm-Up & Rapport

Purpose: Build connection and ease into the call.

Goal: Make them feel comfortable and start understanding their business foundation.

- ☐ What's your business and what do you offer?
- ☐ How long have you been running your business?
- ☐ When do you launch (if applicable)?

5-10 MINUTES

Understanding the Brand & Audience

Purpose: Learn who they serve and what drives the brand.

Goal: Get clarity on their positioning and target customer.

- ☐ Who is your ideal customer or audience?
- ☐ Are they primarily local, national, or international?
- ☐ What makes your brand stand out in your space? (Unique selling point)
- ☐ Who are your main competitors?

10-15 MINUTES

Current Marketing & Social Presence

Purpose: Understand what's already being done and what's not working.

Goal: Assess their current efforts and challenges.

- ☐ Where do you currently get the majority of your sales or clients from?
- ☐ What social media platforms are you currently active on?
- ☐ What's the account history (*any bought followers etc. Only ask if they have a lot of followers*).
- ☐ Are you running any other marketing? (ads, emails, influencer, etc.)

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15-25 MINUTES

Goals, Needs & Red Flags

Purpose: Identify their goals, motivations, and fit.

Goal: Uncover what they actually need and if you can deliver that.

- ☐ What's your main reason for needing social media management?
- ☐ What are your short-term goals (next 3 months)?
- ☐ What are your current struggles with social media?
- ☐ How involved do you want to be in the content process? *(to gauge micromanagement/red flags)*
- ☐ Have you worked with a social media manager before? How was that experience?
- ☐ What does success look like for you?

25-30 MINUTES

Logistics & Next Steps

Purpose: Confirm timing, expectations, and alignment.

Goal: Determine if you want to move forward.

- ☐ When are you looking to start?
- ☐ Do you have a budget or range in mind for social media management?
- ☐ Any upcoming campaigns, launches, or events I should know about?
- ☐ Do you have any questions for me or anything else you'd like to share?
- ☐ Outline next steps if you're a good fit (e.g., I'll send a proposal)

During or after the call, jot down:

- *Potential red flags: unrealistic expectations, budget mismatch, lack of clarity, poor communication.*
- *Green flags: clear goals, trust in your expertise, consistent brand vision.*
- *Opportunities: content ideas, gaps in their current strategy, unique brand angles.*