

Discovery Call

Playbook



Before You Hop on That Call

Hey friend,

Discovery calls can feel awkward, especially when you're juggling nerves, imposter syndrome, and the pressure to "get the client." I've been there. You open Zoom, smile too much, and suddenly find yourself agreeing to something that makes your stomach sink.

This playbook is here to change that.

We're not just going to talk about what to say, though you'll get plenty of that. We're going to reset how you think about these conversations. When you stop trying to prove yourself and start treating this call like what it really is, a professional evaluation, you show up differently and start serving as a collaborator and partner instead of an order-taker.

This playbook exists to show you how to partner with your clients, ask smart questions, and lead a professional, strategic conversation that helps both of you decide whether this is a good fit.

I'll walk you through exactly how to do that step by step.

Ready? Let's go.

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Section 1: Framing the Call

What a Discovery Call Is (and Is Not)

Let's start with what a discovery call is not. It's not a sales pitch. Or a casual chat. And it's definitely not a job interview.

It's a working conversation. Your role as a freelance business owner is to lead the call and guide the client toward a clear understanding of what you can accomplish together. You are going to uncover what they actually need (vs what they think they need, though they can be the same thing), and evaluate whether this is a collaboration worth pursuing.

Don't start the call thinking you have to impress anyone or win approval. Okay, maybe you are just a smidge. But your primary purpose is to make a sound, professional judgment.

One of the biggest objections I hear about discovery calls is, "But I don't know what to say."

We're going to fix that together! Later in this playbook, you'll get adaptable scripts, phrasing, and strategic questions for every part of the conversation.

Knowing what to say is important, but it's even more important to shift your mindset.

What do I mean by that?

We need to change how you think about the client-getting process so you show up differently.

That means a shift:

From	To
I need this client to hire me.	I'm evaluating whether we're a good fit for each other.
I hope they like me	I want to understand their needs and see if I'm the right person to meet them
I need to prove I'm worth it	I'm showing up as the expert I already am

I'll take whatever work they offer	I only take on projects that align with my strengths and boundaries
From	To
The client is in charge of this conversation	I'm leading the call to get clarity for both of us
I'm here to sell myself	I'm here to ask smart questions and listen carefully
I need to sound impressive	I need to be honest and helpful
Every call is a potential paycheck	Every call is a chance to protect my time and energy
I hope they don't ask me anything hard	I'm ready to guide them through what they really need

Making a shift from trying to “get hired” to evaluating the opportunity, **will radically change how you show up, and how seriously clients take you.**

Why Does Mindset Matter?

When we walk into a discovery call hoping to be chosen, we tend to play small. We downplay our prices, avoid direct questions, ignore the little red flags, and that can end up leading to work that feels draining, disorganized, or underpaid.

Reframing the call as a collaborative evaluation puts you in control, and makes you sound professional. It also earns trust faster than any elevator pitch ever could.

When you show that you know how to lead a conversation, ask the right questions, and spot gaps or misalignment early, clients feel safer.

And so do you.

Section 2: The 5-Part Framework for Discovery Calls

Running a discovery call can feel overwhelming, especially if you're trying to balance imposter syndrome, remembering your research about the client, active listening, asking smart questions, and looking competent while doing it.

I've created a five-part framework to help you simplify all of that.

Using a framework gives you a clear structure to guide the conversation without sounding scripted or robotic. Think of it like a map: you can take detours, but you always know approximately where you are and where you're headed.

The five stages we're going to talk about are:

Context → Goals → Scope → Fit → Close.

Let's walk through what each one means, and what you're really listening for.

Context: Who Are They?

You need to start with the big picture.

- What does the client do?
- Who do they serve?
- What's their core offer?

You're orientating the call and getting your bearings so you can understand what service would work best for them in case what they are asking for isn't actually going to solve their problem.

Listen to understand. If their answers are disjointed or surface-level, that might point to a bigger problem you'll need to address.

Goals: What Are They Trying to Achieve?

Now you start focusing on their needs.

- What's the purpose of this project or engagement?
- Why now?
- What result are they hoping for?

You are working toward an understanding of what success looks like for them.

Good discovery work often reveals that the client's stated goal ("We need someone to post for us on Instagram") won't actually solve their problem ("We're not converting and don't know why").

Your questions here get the client thinking, and you start to stand out as someone who does more than finish tasks.

Scope: What Do They Think They Need?

This is the part where you get into the shape and size of the project.

- What kind of work do they expect?
- How often?
- How long?
- How fast?
- Who else is involved?

You're gathering practical information, but you're also stress-testing their expectations. Not asking the right questions in this stage is often where misalignment and scope creep starts.

Don't just listen to what they say. Listen for what they assume.

Fit: Is This the Right Match?

Not every potential client is your client.

I think all of us need a sign on the wall near our computer that says, "They're Not Your Client" to remind us that sometimes we need to say no.

Fit means more than liking the project. It means aligning on expectations, process, values, and working style.

- Have they worked with freelancers or consultants before?
- Do they give clear feedback?
- Are they looking for a partner or a pair of hands?

This part of the conversation helps you understand whether the relationship would be productive or frustrating.

Close: What's the Next Step?

The final stage is about making sure you're both clear on what's happening next.

You summarize what you've learned, repeat back the key goals and scope points, and lay out what happens next, whether that's a proposal, a wait-and-see, or a pass.

Clients should leave the call knowing exactly what to expect. So should you.

Let's look at each of these more in-depth.

Stage 1: Context

“Who are they, and what's the situation?”

Discovery call, sales call, client call. Whatever you call them, this is your first real communication with your potential client and it sets the tone for your entire relationship. Yes, this call has a practical purpose of learning about the client and the project. It's also an important part of client management and onboarding and gives you the opportunity to establish yourself as a strategy partner instead of a task-completer.

Every discovery call should start by establishing **context**. This is the foundation of the call. You're listening to understand what the client does, who they serve, and where this project fits into the bigger picture of their business.

You're also listening for clarity. Can they explain their work in a way that makes sense? Do they sound confident, or a little all over the place? Are they well-rooted in their industry and audience, or feeling their way through it? These early signals tell you a lot about how easy (or difficult) they'll be to work with.

Don't rush this part. Even if you think you already know what they do, ask anyway. Clients often reveal details they didn't include in their initial inquiry, and those details can change how you frame the entire engagement.

What You're Listening For

- What business are they in, really? (Industry ≠ business model)
- Who are their clients or customers?
- What's their core product or service?
- What's working right now, and what's not?

You're also starting to sense the **tone** of the relationship. Are they collaborative? Commanding? Vague? Distracted? You're observing the energy and starting to get a sense of fit.

Sample Questions (Use and Adapt)

These aren't meant to be a script you use as-is. Adapt and use what fits your voice and service area.

- "Can you tell me a little about your business and the work you do?"
- "Who do you serve, and what kinds of problems are you helping them solve?"
- "How would you describe your brand or business in a few sentences?"
- "Where does this project fit into what you're building or offering right now?"

This stage helps you understand whether the project request makes sense, and whether it's likely to evolve into something bigger (or fall apart quickly).

Bonus: A Strong Opening Sets the Tone

If you don't take control of the call right away, the client will. And that will seriously limit your ability to collaborate and partner with them. It puts you firmly in task-completer status. I like to start with something like:

"Thank you for making the time to talk with me today. I'm looking forward to learning more about your business and your [content, strategy, marketing, etc] needs. I'd like to start with introductions, spend a few minutes talking about your business and your needs, look at project scope, discuss communication and working style preferences, and then discuss next steps. Does that sound okay to you?"

Those first sentences are so important that I recommend you put them on a post-it and put them right under your camera so you can set the tone for your call.

Stage 2: Goals

"What are they trying to achieve?"

Once you understand the context, the next move is to start looking at the why: What's the *point* of this project? What outcome are they hoping for? Why now?

This is where you start separating real opportunities from reactive flailing. Clients often come in asking for a deliverable ("We need a new website" or "We want blog posts twice

a week”), but what they really want is a result: more leads, more clarity, more authority, more sales.

Your role is to help them get specific. Vague goals and a lack of a deeper understanding lead to vague projects. And vague projects become chaotic very fast.

What You’re Listening For

- Is the goal clear, or a bit scattered?
- Is it business-driven (growth, sales, leads) or personal (burnout, bandwidth)?
- Is it short-term urgency or long-term strategy?
- Do they have a clear reason for starting this now?

You’re also testing whether they understand how your work contributes to that goal, or whether they’re hoping you’ll figure it out for them.

Sample Questions (Use and Adapt)

- “What are you hoping this project will help you accomplish?”
- “Is there a particular result or outcome you’re aiming for?”
- “How will you know this was successful? Are there any metrics or signals you’ll be tracking?”

These questions help clients clarify their own thinking. Sometimes they don’t know what they want until you ask the right question, and that alone can make you stand out.

Strategy Note

Clients don’t always use business language. That doesn’t mean they don’t have business goals. A coach might say, “I want to feel more confident sending people to my site.” That’s a lead conversion problem in disguise.

Listen closely. Translate if needed. And clarify when their stated goals don’t match the work they’re asking for.

Stage 3: Scope

“What do they think this actually involves?”

Once the goal is clear, it's time to talk about the shape and scale of the work. Skipping this can and will lead to the project falling apart *after* the call because no one actually defined what was being asked for.

Scope isn't just what the client wants done. It's how much, how often, how fast, and under what conditions. It's also what *they assume* is simple or standard, which is where a lot of hidden complexity lives.

This part of the call is where you shift from *vision* to *logistics*.

What You're Listening For

- What are they expecting you to deliver, in what format, and on what timeline?
- Is this a one-off project or ongoing engagement?
- Do they have a process in place, or will you be building one?
- Are there other people involved (decision-makers, reviewers, editors, etc.)?

You're looking for gaps, assumptions, and areas where expectations need to be corrected or clarified. Scope creep hides in the details they didn't think to tell you.

Sample Questions (Use and Adapt)

- "What does this look like in practice? What kind of deliverables or outcomes are you expecting?"
- "Is this a one-time project or something ongoing?"
- "Are there specific deadlines or publishing schedules we should be aware of?"
- "Do you already have a brief or process in place, or would you want me to shape that?"
- "Who else would be involved in reviewing or giving feedback on the work?"

These questions help you price and plan, but they also help the client see what working with you will actually involve. That is part of the value you bring.

Strategy Note

If a client struggles to define the scope, don't panic. That doesn't mean they're disorganized. It means you have a chance to lead. Offering structure, timelines, and formats is part of what makes you valuable as a collaborative partner.

You'll script proposals more effectively and avoid rework if you dig deep here. Even experienced clients will leave things out unless you ask.

Stage 4: Fit

“Is this a relationship worth building?”

You know what they want. You know what they think they need. Now you need to figure out whether *you* want to work with them.

Fit isn't about liking the person. It's about business alignment: values, working style, expectations, decision-making, and respect. This is the part most people skip, often because they feel like they're still being evaluated. But you're not. You're evaluating, too.

In fact, this might be the most important part of the whole call.

What You're Listening For

- Do they value your expertise, or just your output?
- Do they sound organized, realistic, and communicative?
- Have they worked with freelancers or consultants before?
- Are they respectful of boundaries, timelines, and scope or already testing them?

Perfection is not the point here. You're looking for a relationship that won't drain you. Even a well-paid project becomes a liability if the client constantly second-guesses your work, adds last-minute changes, or treats you like an employee.

Sample Questions (Use and Adapt)

- “Have you worked with freelancers or consultants before?”
- “What made those relationships work or not work?”
- “How do you prefer to communicate during a project?”
- “What does a good working relationship look like to you?”

These questions might feel personal or even risky, but they're the ones that protect you. A client who gets defensive here is showing you something. A client who answers with thoughtfulness and transparency is doing the same.

Strategy Note

Red flags rarely show up as obvious warnings. They show up as vagueness, inconsistency, or urgency without clarity. When someone says, “We need this yesterday but don't really have a plan,” believe them.

This is your alignment filter. You can't outsource that decision to instinct or vibes so you need to ask, listen, and decide.

Stage 5: Close

“What’s the next move, and is everyone clear?”

You've asked your questions. You've taken in their answers. Now it's time to bring the call to a clean, professional close by recapping what you heard, confirming alignment, and laying out what happens next.

When you summarize clearly, you signal that you understand their needs, that you've been listening, and that you know how to lead a project forward.

What You're Trying to Do

- Reflect their goals and needs back to them accurately
- Confirm alignment on scope, timeline, and process
- Outline your next step (proposal, offer, follow-up)
- Create closure so the client knows where things stand

This part of the call should feel calm, confident, and grounded. Don't chase a yes.

Sample Language (Adapt to Your Style)

- “Here’s what I’m hearing so far: you’re looking to [their goal] by doing [their project], and you’d like it completed by [timeline]. Does that sound right?”
- “I’ll follow up by [sending a proposal, outlining scope and price, etc.] within [X timeframe].”
- “If you have any questions or want to move forward after reviewing, just reply to that email. The proposal will be valid for 7 days. Would you like to schedule a call now to go over that in person?”

Strategy Note

Don't end with “I'll send a proposal” unless you're actually going to. Don't say “Let's talk again soon” unless you mean to follow up. Be specific.

If it's not a fit, say so directly and kindly. There's no upside to leaving doors half-open out of guilt or indecision. Respect yourself, your work, and your energy by closing loops clearly.

Bonus:

Here's an example of how I'd close out a call.

"Let me recap to make sure we're on the same page and I've understood everything correctly. You want to [insert goal] by [insert timeline], and the main challenges you're facing are [briefly name them]. The project would likely involve [summary of scope]. Does that sound accurate?"

From here it can go one of two ways:

1. Pricing on call:

"For a [project type] that includes [scope] my rate is \$xxxx. That falls within your budget range, and I believe this is a good fit. If you'd like to move ahead with the project, I'll send you the contract/scope of work for your approval along with the invoice and we can get started as soon as that invoice is processed."

2. Proposal:

"From here, I'll [send a proposal, outline scope and pricing, etc.] by [specific day/time]. That document will include all the details we discussed—timeline, deliverables, and pricing—so you can make an informed decision and the pricing and schedule on that will remain valid for 7 days. (Optional: I'd like to schedule a quick call to answer any questions you [or you and decision maker] have. Would [date and time] work for you?)"

Then I finish up one of three ways:

1. I want to work with them and they've said yes:

"Thank you again for a great discussion. I'm excited about your project and look forward to getting started. Please let me know if you have any questions about the contract or invoice. Have a great day."

2. I want to work with them and they need to review the proposal:

"If the proposal looks good, I'll send the contract and deposit invoice as soon as I get a yes from you. As soon as that deposit is completed, we can schedule the kickoff call on the project. As I said, if you'd prefer to walk through the proposal live, I'm happy to schedule that call and I'm always available via email."

3. It's not a good fit:

“I want to thank you for your time today. At this time, I don’t think this project is a good fit for my business goals and objectives. If you’d like, I’d be happy to send you the names of a few others who might be a better fit.” OR “Thank you for making time for the call today. Based on what you need and your timeline, the project is not a good fit with my schedule right now. I know of several others who may have more immediate availability. Would you like me to connect you with them?” OR “Let me review what we’ve discussed today and I’ll respond to you by [day and time].” Followed by a nice turn down email that is similar to one of the messages.

Let’s Wrap This Up

You don’t need to be perfect on a discovery call. You just need to be honest and clear.

Clear on what you offer. Clear on what they need. Clear on what happens next.

This playbook gave you the structure, language, and mindset to lead that call like the expert you already are.

Remember: you are not auditioning. You’re assessing fit as much as they are.

Every call isn’t a “yes,” and that’s a good thing. Saying no to the wrong projects is how you make space for the right ones.

There are three more sections in this playbook to help you further customize and get the most out of your discovery calls. The first includes additional questions to help you shape your calls. The second is all about qualifying clients. The third helps you want out for those red flags.

So go lead that call with confidence. You’ve got the tools, and the structure. All you have to do is use them.

Customizable Question Sets

Each service type has its own nuances, different kinds of scope, challenges, and success signals. These question sets build on the 5-part framework, giving you plug-and-play language to adapt based on what you offer.

Use These Rules:

- **Don't use them all.** Select 1–2 per phase of the call.
- **Adapt the phrasing** to sound like you.
- **Watch for the client's language** and mirror it back where appropriate.

Content or Writing Services

Context

- “What kind of content are you currently publishing or using in your business?”
- “Is your content mostly DIY, in-house, or outsourced right now?”

Goals

- “Are you looking to grow traffic, increase leads, build trust with your audience or something else?”
- “Do you have content-related KPIs or benchmarks you're working toward?”

Scope

- “What types of content are you thinking: blog posts, email sequences, long-form guides, social posts?”
- “Do you already have topics and a brief, or would you want help shaping those?”

Fit

- “Do you typically give written feedback or prefer to talk things out?”
- “How involved do you want to be in shaping voice and tone?”

Close

- “I’ll send over a scope summary with rates and a few ideas for how we might structure this so you can review and decide what feels like the right path.”
- “I’ll follow up in a couple of days to answer any questions you may have and to customize as needed. Would you like to go ahead and schedule a call for that now?”

Design Services

Context

- “What visual assets are you currently using for your brand or marketing?”
- “Has your brand gone through any recent changes such as new offers, audience shifts, etc.?”

Goals

- “Are you looking to refresh your identity, increase engagement, improve usability, or another outcome?”
- “What kind of impression or experience do you want your audience to have visually?”

Scope

- “What deliverables do you have in mind: web design, social graphics, templates, full rebrand?”
- “Do you already have brand guidelines or assets I should work within?”

Fit

- “How do you like to review design? On calls, in tools like Figma, or async?”
- “Who else weighs in on visual decisions, if anyone?”

Close

- “I’ll map out a scope of work based on this, with clear timelines and revision rounds so you know exactly what to expect. I’ll send that by [timeline] and check in with you the following day.”

Strategy & Consulting

Context

- “What’s motivating this project? Are you trying to solve a problem or create something new?”
- “What internal capacity or capability do you already have, and where are you looking for an outside perspective?”

Goals

- “What would success’ look like to you at the end of this engagement?”
- “Are we solving an acute problem or setting you up for long-term systems and growth?”

Scope

- “Are you looking for a one-time audit, a strategy you can implement, or ongoing guidance?”
- “Do you have a team in place to execute, or would you need help building that out?”

Fit

- “Do you want high-level insight only, or hands-on help applying it?”
- “Have you worked with consultants before? What worked for you and what didn’t?”

Close

- “I’ll follow up with a proposal outlining a few engagement models so you can choose the level of support that fits your goals.”

Pre-Call Qualification System

“Should this call even happen?”

Before you ever get on a call, you should know:

- What the client wants
- Whether they have a budget
- When they need it
- Whether this fits your expertise or business model

That’s what pre-qualification does.

Many people skip this step because they don’t want to scare clients away. But skipping qualification costs far more in wasted time, awkward conversations, and misaligned expectations.

The Three Layers of Qualification

Basic Screen (always include on your intake or booking form):

- “Briefly describe what you’re looking for help with.”
- “Do you have a budget range for this project?” (Include dropdown options if possible)
- “Is there a deadline or specific timeline I should be aware of?”

Fit Filter (during discovery call and optional, especially for strategic or ongoing work):

- “Have you worked with a freelancer/consultant before?”
- “What are you hoping this partnership will help you achieve?”

Red Flag Detection (use your judgment):

- Do they avoid answering key questions?
- Are they vague about budget or urgency but pushy about timelines?
- Are they saying things like “quick project” or “shouldn’t take long”?

If a lead fails this screen, you have two options:

- Politely decline the call and (if appropriate) refer them elsewhere

- Ask clarifying questions via email before confirming the booking

Sample Decline Response

“Thanks so much for reaching out and sharing more about your project. Based on the details, this isn’t a good fit for my [business/schedule]. I want to make sure you get the right support, though. So if it helps, I can point you toward someone better suited. Wishing you the best with the project.”

This protects your time *and* builds reputation. You don’t need to take every call to be seen as helpful or professional.

Red Flags & Decision Filters

“What are the warning signs, and how do I know if this is worth it?”

Even when a lead makes it to the call, not every client should become a client. This section helps you recognize red flags early and gives you a decision-making structure that isn't based on gut feeling alone.

Red Flag Signals to Watch For

These don't always mean *run*, but they always mean *pause*.

Urgency without clarity: “We need this done by next week,” but they can't explain the goal, deliverables, or approval process.

Budget vagueness or evasion: Any version of “You tell me what it should cost” or “We'll pay if we like it.”

Disrespect for boundaries: Interrupting, dismissing your expertise, or overstepping tone in emails or messages.

Project sprawl: They're asking for “just a quick thing” but keep adding new components without defining scope.

Misalignment of values or process: They want full control and fast output but you offer collaboration and depth. That's a mismatch, not a negotiation.

Decision Filters to Use Instead of “Vibes”

When in doubt, run the project through these three filters:

1. Do I have enough clarity to quote or propose confidently? If not, the call didn't provide enough information. Follow up or pass.

2. Can I picture this project going well with this person? If you're already anxious or confused, trust that.

3. Would I regret saying yes to this if something better came along next week? That's your opportunity cost test. Respect it.

You don't need to avoid all the red flags. You just need to recognize them *before* you say yes.

Some clients will surprise you in a good way. Others will drain you in predictable, avoidable ways. Your job is to decide which is which before a contract ever gets signed.