DISCOVERY CALL PREP GUIDE

Get the most from your 30-minute conversation

WHAT TO EXPECT

Our discovery calls are conversations, not sales pitches. We'll spend most of the time understanding your situation. You'll leave knowing whether AI can help and what a realistic path forward looks like.

QUESTIONS TO CONSIDER BEFOREHAND

About your challenge:

What specific process or problem prompted you to book this call?

How much time/money does this problem cost you per month?

What have you tried so far?

About your organization:

Who else would be involved in an AI project decision?

What's your typical timeline for evaluating new solutions?

Are there any hard constraints (budget, timeline, technology)?

About your goals:

What would success look like in 6 months?

What would make this project not worth pursuing?

WHAT TO BRING (OPTIONAL BUT HELPFUL)

A brief description of your current workflow

Examples of the manual work you want to automate

Any relevant documents, spreadsheets, or screenshots

Questions you want answered

AFTER THE CALL

If there's a fit, we'll typically:

Send a brief summary of what we discussed

Provide a preliminary scope and investment range

Schedule a follow-up if you want to proceed

If there's not a fit, we'll tell you directly and point you toward better resources.

See you on the call!

Questions before then?

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