Discovery call and quote pack

A discovery-call script, a fit checklist to qualify out early, and a quote template tied to your packages.

01 Discovery-call script

Run every call the same way. Understand first, then confirm fit, then explain what you offer.

- [ ] Understand: ask about their business, their numbers, and what is prompting the call now.
- [ ] Confirm fit: check they match your niche, your services, and your capacity.
- [ ] Explain: walk them through the package that fits, and what it includes.
- [ ] Agree the next step: tell them a written quote follows, and by when.

02 Fit and qualify-out checklist

Saying no to the wrong client protects the ones you say yes to. Decide before you quote.

Are they the right size and type for your packages?

Can they afford, and commit to, a recurring monthly fee?

Is the work inside your scope, or does it need something you do not offer?

Any red flags: chaotic records, unrealistic expectations, chasing the cheapest price?

03 Quote template

Quote fast, in writing, and tied to the packages you built in Module 1. Consistency stops you undercharging.

PREFER THIS DONE FOR YOU?

Want enquiries arriving pre-warmed and ready to quote?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

Talk to us

Which package fits, and the monthly fee?

What is included, and what sits outside for a separate charge?

Your payment terms: monthly Direct Debit, in advance, mandate before work.

When you will follow up if you have not heard back.

PREFER THIS DONE FOR YOU?

Want enquiries arriving pre-warmed and ready to quote?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

Talk to us