Discovery Call Notes Template

Notes from a first call with a prospect: their situation, pains in their own words, what success looks like, who decides, and the agreed next step.

Company	
Contact (name, role)	
Other stakeholders mentioned	
Date	
Source (how they found us)	

Current situation

How they do it today, which tools, team size.

Pains

Pain (their words)	Impact / cost

Desired outcome

What success looks like for them; any metric they named.

Qualification

Field	What we heard	Evidence (quote)
Budget		
Decision-maker		
Decision process		
Timeline		
Alternatives considered		

Objections and questions

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Next step

Action	Owner (us / them)	Date

How to fill it in

- **Pains in their words,** not in product terms. You'll reuse them in the recap email.
- **Empty qualification fields are a signal,** not a gap to fill. If budget wasn't discussed, leave it blank — that's what to ask next time.
- **Evidence column:** a short quote that supports the field, so others can trust it.
- **One clear next step** with a date, agreed by both sides.