Laura Davis: [00:00:00] On this week's episode, we are talking all about a recent discovery call that we went on and how shockingly bad it was. And before we move on to the intro, I just want to say happy birthday to Laura Moore 'cause this is going out on her birthday.

Laura Moore: Oh, thanks. It's my birthday. Welcome back to my birthday episode of JFDI with The Two Lauras.

This is what it's officially gonna be called from now on. Um, feel free to come and send me a birthday message. You know, I, I'm always on Instagram. Um, but let's just talk about what this episode is actually about. Um, this is the podcast. I've been totally thrown off by my own birthday for this intro, just by the way.

But yeah, welcome back to the podcast for social media managers where we talk about all sorts of things that are not just birthday related, sometimes they're about marketing and winning clients and content ideas and inspiration and all sorts of things. And as Laura's just alluded to today, we're talking about discovery calls because we [00:01:00] had the worst discovery call ever recently.

It was so bad. I'm gonna tell you all about it and give you some tips and ideas on how to make sure that your discovery calls don't go as badly as this one did. So shall we get straight into the story or do you wanna sing happy birthday to me?

Laura Davis: No, let's not. My singing is not good enough for a podcast.

Um, right. So let's just give some a bit of background. So we wanted some help as generally people do. That's why they have discovery calls. But it was worth saying this wasn't a social media manager, right? But at every point in the process we were like, oh my God, like this was bad. Um, and there's so many lessons from all of those stages, right from the start of this discovery call.

So we just thought we'd have a bit of a, we haven't really made notes on this, we just thought we'd kind of talk through the process and discuss what went wrong for [00:02:00] them. Um, so –

Most of it!

So you guys cannot make those and I hope no one's making these mistakes. 'cause it was like a catalog of, of errors. So we booked the call. That went fine.



Laura Moore: It did. That was fine.

Laura Davis: That was all fine.

Laura Moore: That all went fine. That process was easy. Yeah. Very good. Can't complain.

Laura Davis: We then got on the call and it, it was Laura and I and then two other people and one person was late.

Laura Moore: Yeah. So one person probably a good 10, 15 minutes, wasn't it?

Laura Davis: Yeah.

Laura Moore: And the other person, well, let's just say Laura and I are very much of the opinion, and hopefully most people are of this opinion that a discovery call should be about trying to discover. Something about the person who wants to hire you so you know what they want. You can create a proposal, you can deliver on it, et cetera, et cetera.

And in that case, you would imagine that the person like looking to hire you, would be [00:03:00] the person doing the most talking. Like Laura and I probably sat on that call for at least half an hour and didn't say a word. We were not asked any questions. We were just being talked to for at least half an hour of, by the way, this discovery call was in our calendar for I think 30 minutes and it ended up being an hour and 15. Like it just went on and on and it was over lunchtime and I was starving. That wasn't good.

Laura Davis: That's never good.

Laura Moore: Never good. But literally for the first half an hour, he didn't ask a single question. It was just constant, like talking about how amazing they were talking about how great a sales person they were. Spoiler alert, they weren't.

Laura Davis: Yeah, this was it, there, so there's one of them who was probably more techie, one of them who was obviously responsible for sales and the sale, and he described himself as, well, and we got his backstory. We got his whole life history.

Laura Moore: Yeah. From birth.

Laura Davis: From one, one perspective. I was like, is he just killing time? Because this other geezer didn't arrive, but it was just all unnecessary. Like I honestly, we'd [00:04:00]



done our, well, we thought we'd done a bit of research into these people, so I didn't need the life history of the business. We understood what the business was delivering. That's why we'd booked a call. So we didn't need all this kind of fluff, and it was like 15 minutes and he's still got, Laura and I are just like, mm-hmm. Mm-hmm. Yeah. Mm-hmm.

Laura Moore: Smile and nod.

Laura Davis: Yeah. And then this other person then joined the call and I get it, you know? Like I hate being late and I hate it when people are late, but I do try to be sympathetic to that. Sometimes it is out of your control, but he did and he did apologise, and then he was clearly wanting to wrap it up as well.

It was so interesting watching the dynamics between the two people because it was like the one, the salesy one was very chat chat chat chat chat, and the other one was less so, was he was kind of trying to shut him up without saying, shut up mate. So it was really interesting, like I found that fascinating, obviously being one of [00:05:00] two.

It was interesting to watch two people, so we were probably about 45 minutes into the conversation and I at this point had realised they had completely not understood what we were needing.

Laura Moore: Which isn't a surprise because they hadn't once asked us.

Laura Davis: Hadn't asked. Yeah. So they kept, and then the one was going off and saying, oh, I'm gonna, whilst the other was talking, the other was like, I'm gonna get you an example that I can show you, which was fine at this point, where I was still like, maybe he does get it, maybe he doesn't get it.

And then the other person was like chatting away asking us questions that weren't really relevant. And I was like, why is he asking us this? We don't want X, Y, Z. We are here for A, B, C. And then the other person then came back, wanted to share his screen, oh, share his screen with us. And like it just wasn't relevant.

He completely not understood as Laura's just said. 'cause they never bothered to ask what it is we [00:06:00] needed or wanted or really understood our business. Understood what we were trying to achieve. Um, so –



Laura Moore: It was as though that they, it wasn't just that they had misunderstood what we want wanted, it was that they were at a totally different level than what we wanted as well.

What we wanted to talk to them about was fairly basic. Yeah. And they were coming in a very much a, a. I don't wanna say mansplaining, even though there was a lot of it. But it was very much a, this is like advanced levels to try and wow you. And to try and make them look good so that we were like, oh my God, this is like really technical.

We couldn't possibly do anything like this, but it wasn't even what we needed. So it. Because they did, they hadn't bothered to take the time to find out what we needed. So they were talking to us at a totally different knowledge level, totally different tech level. And I think that could probably happen in a, in a discovery call with a social media manager as well, because we're also in it.

Aren't we all, we all [00:07:00] know what we know. We don't know what our client doesn't know. So we are talking about it from a, a very high level, that we would have a conversation with a peer rather than with a client who has no exp, you know, no knowledge. Because they didn't find out our knowledge level, what they were talking to us about was not only irrelevant, but it was at a different knowledge level for us.

And at one point we did well, I did actually have to say to them, look, we need to stop you because this is absolutely shit and it's not relevant. And what you're telling me is like, is just pointless. And we still were on the call for about another 40 minutes after that. It just went on and on, didn't it.

Laura Davis: Because then I think then they, and to be honest, he did say, oh, I'm sorry, we have misunderstood. So then it was like everything started again. So then they were trying to like come at it from a different angle. That, and to be fair, the more correct angle. But by this point I'd like zoned out my doodling that I often do on calls had gone like my sheet was just full of doodles, like I'd zoned out. I was like these people, bearing in mind –

Laura Moore: My face hurt from my fake smiling.

Laura Davis: Yeah. [00:08:00] We'd also had a different discovery call. Was it the same day or the day before, which had –

Laura Moore: Yes, it was the, the morning, wasn't it?



Laura Davis: Which was a much better experience. Much more to the point. They clearly knew what we needed. They knew that they could deliver it, so that was much more slick. So in comparison, this was just like a shit show, but then it, we kind of started to. Couldn't be able to round up the call, thankfully. And he, he did what we would always recommend social media managers do.

They say, I'm gonna follow it with a proposal. Great. Including a price. Although they did then start fumbling saying, well, it'll be roughly this. They were like, what kind of budget have you got in mind? And I was like, it depends. I'll know whether I feel like vomiting, whether it's too much when you send it and they like.

Laughed and I, there was this kind of patronising, kind of mansplaining a bit. I think they thought we were gonna be like, oh, we are not going to spend more than £100.

Laura Moore: 50p.

Laura Davis: Yeah. Whereas actually we had a, a fairly big [00:09:00] sizable budget for this project, and they came in very low. Really? Didn't, well, he was like, yeah, it's gonna be,

Laura Moore: We were like, oh, that's a bargain. We'll have two.

Laura Davis: Yeah. He was like, oh, it's gonna be roughly about this price. It's like, don't gimme a rough price. Go away. Give me an actual price because if he gave me a rough price and then came say three grand, and then the proposal comes in in a few days at four grand because they've actually sat down and done the numbers, that's not good. 'cause in my head –

Laura Moore: No. That makes four grand sound, sound expensive.

Laura Davis: Exactly.

Laura Moore: Even though it would still have been lower than our actual budget.

Laura Davis: Yeah. So not, we would never advocate for having, putting, giving anyone a price face to face. You always should be saying to people. I'm gonna go away and I'm gonna figure this out so I can give you an accurate price.

I don't wanna get it wrong now, but if you are ever un, ever put like completely under pressure and there's no way out, go higher. Go [00:10:00] higher. So then when the



proposal comes in it, they go, oh wow, that's amazing. Okay, that's a lot cheaper than I thought. So then they, the psychology behind that. People think, okay, this is more affordable than I was.

Envisaging it was gonna be, so it's a more pleasurable experience to look at that price. But they were like, oh yeah, well I think it's gonna roughly be around this price and, but we'll put a proposal together. Fine. Like, tick. And they were like, and then let's book in a follow up call next week. Which you could see both of Laura and I were like, that follow up call is not gonna be needed. But we did, we did. Go. Okay, fine. Well –

Laura Moore: Can I just say the best thing about this whole conversation about the follow-up call was that obviously this call had run on, it had been really long and he was like, it'll only be half an hour. We were like, yeah, right. And uh, he said, Laura said, can you do first thing in the morning?

He went, well, I've got a call at at 10. She was like, that's fine, let's do 9:30. Because we were like, we'd know we'd be off. No, no, no, I can't do that. So [00:11:00] she said, okay. Um, what about in the afternoon? I've gotta leave at 3:30, so shall we do three? And it was like, so it was, it was very much us putting boundaries, wasn't it?

Laura Davis: Yeah. He was like, can you do a bit earlier? And I was like, no. No, like, no. So you either wanna speak to us or you, or you don't. But yeah, there was definitely a bit of kind of strategy involved, just trying to make sure it didn't run over. But to be honest, knowing, booking that call in, I knew we wouldn't, yeah, we probably be doing that call, although I was intrigued.

I did wanna see the proposal. I was interested to see what they were gonna, um, suggest, um, especially towards the end of the d the discovery call where I think there was kind of getting what we needed. So, yeah. So they were gonna follow up with a proposal, he said within a a few days.

Laura Moore: Within a few days. Very specifically said, yeah, within a few days, yeah.

Laura Davis: Again, setting expectations. And then the call was for the following the, a week exactly to the day, wasn't it? So we were like, fine. Okay. I think it was on a, the, I can't remember now, [00:12:00] but can't remember. We were gonna get, I was thinking we'll get the proposal in in a few days and we'll have a couple of days to be able to consider that before this call. So, and then we ended the call. Thank God.



Laura Moore: Yeah.

Laura Davis: And then -

Laura Moore: Just have a lie down in a dark room.

Laura Davis: Yeah. And then - nothing. No proposal.

Laura Moore: No. We waited and waited and waited, didn't we? And we did. The proposal never arrived, so we thought, well, maybe they just don't wanna work with us. Yeah, that's fine. We're not upset about that.

Laura Davis: Decision made.

Laura Moore: Easy. And so the day before, and we, but we did wait, didn't we? We were like, we just wait and see what happens. And the day before the follow-up call, we cancelled it.

Laura Davis: And it's worth, it's, it's worth saying. If they'd have come to us and said, look, I'm really sorry. Something's come up. I haven't been able to get the proposal to you.

Like we're, we are normal people. Like we know shit happens. Although, would've probably subconsciously made me be a bit like, ugh, but I'd have been totally fine if they'd have just messaged us and said, look, I'm really sorry. We're gonna be a day late with this. Or [00:13:00] can we push this back? Like we are totally normal in that's –

Laura Moore: Normal humans.

Laura Davis: Yeah, that's fine. But no, so they, we heard nothing. So a day before this call bearing in mind, we are busy people, we have got a lot going on at the moment. We were like, no, they, we've not heard from them 24 hours before this call. There's plenty of other things we need to do with our time. So yes, Laura said we, we cancelled the call.

Laura Moore: And it was very easy to cancel the call. Great process. Just basically like a Calendly kind of link, click cancel, give a reason. I just basically said, we haven't heard from you, so therefore we don't need the follow up call. Job done. We thought that we would move on with our lives and go ahead with the other person who had been a brilliant discovery call.



Um, so that was brilliant. Like, and just so lessons from this, if you are on a discovery call and you give someone an expectation that you are going to send a proposal, well, first of all, I would follow up straight away, you know? Great. Thank you so much for the call. Just to let you know, I will get your [00:14:00] proposal over to you by X, Y, Z date. Here's a reminder of the follow up call that we've booked in. Yeah. Straight away.

Laura Davis: And this is where the phrase under deliver, no, under promise, over deliver comes into effect. I got a phrase right. Although I stumbled.

Laura Moore: Well done. Well done. Um, so we didn't get that email, but I would, I would, ideally you would send that email.

Then obviously you wanna meet that expectation and send the proposal or whatever it is that you've said that you're going to send them before that follow up call. So they've had a chance to look at it and they've got. You know, in the, their mind they've got the questions they wanna ask you because there's nothing worse.

I, I dunno about you, but I hate getting on a call where they're then delivering the proposal to me and they can see my face and like, and I have no opportunity to think of questions. 'cause it's just awkward, like, don't put anyone in that position. Horrible. So, yeah, just make sure that you are kind of.

If you're setting expectations, you're delivering on them, and if you allow somebody to cancel a call and they give you a reason for canceling that call. Pay attention to what they [00:15:00] say and learn from it. That didn't happen in this case because I got a phone call. Now I don't like it when my phone rings, but I was expecting a phone call, so I stupidly answered it, even though I didn't know the number. Probably the worst thing I did that week.

Laura Davis: It was the worst person to have, either of us, you're the worst one to call.

Laura Moore: Why call me? Yeah. Yeah. Um, and they called me. And they said, why have you canceled your call? And I'm like, I put it on the form. Like I was very clear why I canceled the call and the attitude from this guy was just, well, it was like mansplaining to the highest degree.

Like I was a piece of shit on his shoe. I explained, I, you know, I hadn't had the follow up. He kind of huffed about like as if I was gonna get a follow up when he'd plenty of times said it.



Laura Davis: Well, you know, we hadn't had the proposal.

Laura Moore: Yeah, the proposal, sorry. We hadn't had that. And I was like, we didn't get anything from you, blah, blah, blah.

And he kind of acted as though, why were we [00:16:00] expecting something? Well, because you said it mate. That's why. Then said, well, I can send you something. Should we just rebook in the call? But like, really arse-y. And I was like, no, just don't. The call ended with him saying, haha, good luck. And I was like, mm, pretty sure it's you that needs luck. Not me. I'm fine.

Laura Davis: I just cannot understand what he thought we were following up on.

Laura Moore: Yeah. Yeah. What was the follow up call for if we hadn't seen anything?

Laura Davis: 'cause we'd had no proposal, no, "this is what we can do for you". Bearing in mind we definitely did not get that on the discovery call. Because they were just like.

Talking about themselves basically, and what they've done in the past as opposed to what they can do for us. So I was thinking, right, this proposal's gonna be them saying, this is what I'm gonna do for you and, and then the follow up is look, basically, are we in or we're not in? That's what I would say to a social [00:17:00] media manager.

Those follow up calls are basically saying, right, when are we starting? You know, essentially. Um, and when you told me it was like, you never guess who's just rung me and they, they still wanted this follow up call without the proposal, and that was our problem, that we hadn't had a proposal from them. Like, it's just remarkable.

And as I say, this was like a chunky project, you know, thousands of pounds, this isn't just like a little, a little couple of hundred quid jobby. No, this was, you know, and maybe, you know, maybe they're driving around in their Porsches and maybe 3,000, 4,000 pound project isn't enough for them and it's not worth it. But don't, therefore, don't say to us, you're gonna send a proposal and don't book us in a follow up call.

Maybe ask a budget question on an application form rather than, yeah, yeah, of course. That, because if they're normally working on 10, 20 grand projects, that's fine. [00:18:00] Excellent. But then we weren't right for them because I would not have spent 10 or 20, we didn't need that kind of size of project. So if they'd have been, their application had kind of



alluded to us, this is, this is the kind of project price we are looking at work under, does this suit your budget?

We'd have not booked that call, which again. For you as as social media managers, make sure in your application form there is budgetary related questions so people can self kind of identify whether you are the right person for them because then you remove wasted time. 'cause we'll never work with those people again. And it's likely that we could have done.

No. And we'll never recommend them.

No. And I can't even remember who they are.

Laura Moore: Yeah, I reckon if that call had gone well and everything had gone smoothly and we'd ended up working with him on that project, it would've been a long-term relationship with them. And so that, but that is no way an opportunity now.

Absolutely not. Not [00:19:00] just because of what happened on the discovery call, but because of how the follow-up was and the way that he spoke to me on the phone that just made, made me think, well, hang, who the hell do you think you are to talk down to someone who is going to give you money? It just, and like, no.

Laura Davis: Yeah. But I do think that was down to, not that I'm gonna get on my feminist high horse, but that was the mansplaining. Like, I really like when they, when they were on this discovery call, there was a couple of questions they asked us about our business that, I know surprising that they did, where you could tell they were genuinely surprised by the answer.

I think they just thought, oh, look at these two. Two women coming on this call, we're gonna be able to hook them in. Yeah, they were, that. I just didn't like that. But then that's a bigger issue, isn't it? But um.

Laura Moore: Yeah.

Laura Davis: Anyway, we came out of it better than they did. That's for sure.

Laura Moore: Absolutely. So anyway, that was what happened on our discovery call, but I think there's [00:20:00] some big lessons to take from this. Listen, more than you talk on a discovery call.



Be the one asking questions. Don't be the one just talking and making assumptions and saying that you can do stuff that you don't even know that a client potentially wants. It's not relevant. Yeah, no, a discovery call is about discovering something. So literally like. Be the question asker. Take notes about what it is they're saying.

If you're gonna promise some sort of follow up, deliver on it. Like don't just leave people hanging. And if you can't follow up because something happens, you know your dog has to go to the vet or your grandma died, whatever. Be clear and tell people, I know I said I was gonna get back to you by Thursday, but something's like, everything's gone to pot.

Can you just give me till Monday? And most people would be like, yeah, that's absolutely fine. You know, just be, but be human and, and keep in touch with people.

Laura Davis: But that's, again, just to reiterate, that's this over promise. That's it. Over promise. No.

Laura Moore: No. Under promise.

Laura Davis: Under promise, over deliver. So like, if you are a busy [00:21:00] person and you reckon you, in an ideal world, you could probably get the proposal to them in a couple of days, but you never know because, you know, life throws you, what's that phrase? Life throws you. Life throws –

Laura Moore: I don't know. What is life throwing at you? Shit?

Laura Davis: Spanners or something? Life throws you. Oh, whatever the phrase is, but shit happens –

Laura Moore: A spanner in the works is, is a phrase, I don't know.

Laura Davis: I don't know, but shit happens. So if you are hoping to get it to them in two days time, just say to them, I'll get it to you in three or four days time, because then they're not going to be disappointed when you send it early.

They're like, oh, nice. Whereas if you give yourself too tight a deadline, and then you have to miss it because shit happens, spanners happen, then it does. Although people do accept that that happens, it does subconsciously probably go, oh God.

Laura Moore: Yeah. It's much better to build a buffer in, isn't it? For sure. Yeah.



Laura Davis: Yeah. So definitely over pro-, over deliver, under promise. [00:22:00] Jesus Christ. I've got to stop saying it.

Laura Moore: Oh, tune in next week for more phrases that Laura gets wrong. Um, the other lesson is. Uh, don't talk about prices on a discovery call. You can ask about budget. You can re-, reaffirm what they've said in a budget question that don't say this is gonna cost X, Y, Z. 'cause it's just like, no.

Laura Davis: Yeah, you need to go away and do the maths and do the thinking and do the planning. Like you don't, you cannot give that number. Because bespoke prices mean that you need to go away and create those bespoke prices and based on what they need as a business.

And so just explain that to them just to say I price based on what you want. So I'm not overcharging you, so just give me a bit of time and I'm gonna sit down and make sure that it's an accurate reflection of what you need.

Laura Moore: Yeah, we've got a really good pricing resource actually that will help with this, that I wasn't planning to mention in this podcast.

So I can't actually remember the link. But if you go to thetwolauras.com/price, we'll make sure that that works. [00:23:00] Um, and you can go and grab, uh, this free pricing resource. It's got tons of information in it about how you can set your prices. It's good, um, like a really good cal, uh, calculator that will help you to know what to charge as well, make profit, et cetera.

So yeah, thetwolauras.com/price, we'll make sure that that link goes over so you can go and sign up for that for free. But yes, I think there's a lot of lessons from that. Did we miss any, any others that we wanna, don't mansplain? Hopefully you wouldn't anyway.

Laura Davis: Don't mansplain. Um, and just remember who you are talking to. They don't, they're not necessarily at the level that you are at, so don't overcomplicate things. Remember that they might not have a clue what you are talking about.

Laura Moore: Because often people will think that that will wow people, but actually it won't. It will be the opposite.

Laura Davis: Just overwhelms people.



Laura Moore: It will overwhelm and confuse people and think, actually I'm not ready for you yet.

Laura Davis: Yeah, yeah. So, be, show that you understand where they're at. Don't try to, kind of, overcomplicate things unnecessarily. It's just not worth it.

Laura Moore: Yeah, for sure. Love it. I'd love to [00:24:00] hear from people who've had terrible discovery calls, who've been on the receiving end of a terrible discovery call. So if you've got any stories that are worse than ours, come into our DMs and spill it all. We are all ears.

Laura Davis: Yeah.

Laura Moore: Love to hear all the dodgy stories. Yeah, and like, not to be sexist, but all the bad ones I've been on, have always been with men.

Laura Davis: Yeah, but you know, maybe we need to widen out the social media managers toolkit to anyone who's self-employed working as a service-based business so they can all learn the right way to do these things.

Laura Moore: Maybe, maybe.

Laura Davis: But there's that arrogance isn't there with more, more, gosh, this is such a sexist comment. But generally speaking, men have more arrogance.

Laura Moore: Yeah, sweeping statement. All the men in our world are lovely. All the social media men in our world, they would never do that sort of thing. Um, but these people were not in the social media world, which maybe just says it all.

Laura Davis: Sweeping statement, you say?

Laura Moore: I know this is, this is the podcast of sweeping statements. Um, everything we've said on this podcast [00:25:00] is just opinion, don't come after us.

Laura Davis: Yeah. But if, you know, if you've had a completely different experience and actually –

Laura Moore: And had a really good conversation with a man.



Laura Davis: Come and let us know all about it. Yeah. Let's like level out the perception that we have. We just need to have some more positive discovery calls with with men. And then maybe actually, to be fair, the other one was a man as well.

Laura Moore: That is very true actually. Yeah. So 50-50 split.

Laura Davis: 50-50 split. Yeah. And he was much nicer.

Laura Moore: Yeah, well done for bringing that back.

Laura Davis: Yeah. Okay. Right then, until next week, I hope you are all having a lovely summer and happy birthday again to Laura.

Laura Moore: Happy birthday to me. I'm gonna go eat some cake now.

Laura Davis: Go eat cake.

Laura Moore: Yeah, I will. Colin the Caterpillar. Obviously.

Laura Davis: Oh, lovely. Lovely. Okay. Until next week. Bye!

Laura Moore: Right, see you's later. Ta-ra!

