

# Discovery Call Framework

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Partner enablement asset for uncovering dissatisfaction and creating next steps

Use this framework to understand the prospect's current approach, uncover gaps in engagement or reporting, and move the conversation toward a Human Risk Report, demo, or trial.

## Best used for

- First discovery calls
- Prospects already using another awareness provider
- Prospects managing training manually

## Template

### 1. Establish the current approach

- What is your current approach to security awareness training?
- How often do you run awareness training or phishing simulations?
- Is that process automated, or managed manually?
- Who is responsible for making sure staff complete training?

### 2. Identify engagement and effectiveness gaps

- How do you measure whether your training is actually effective?
- What percentage of employees complete training on time?
- Do staff engage with the content, or treat it as a tick-box exercise?
- Have you seen fewer incidents or stronger awareness as a result?

### 3. Explore compliance and risk drivers

- Do you have any compliance requirements tied to awareness training?
- Has your cyber insurance provider asked about security awareness measures?
- Can you see which employees pose the highest level of risk?
- Have you experienced phishing attacks or incidents linked to human error?

### 4. Create urgency

- What happens if staff do not complete training?
- How much time does your team spend chasing completions?
- Would a fully automated system reduce your workload?
- If I could show you a way to improve engagement, lower admin, and reduce risk, would that be worth exploring?

### 5. Close on a next step

Suggested close:

Based on what you've shared, it sounds like there may be a few gaps in visibility, engagement, and follow-up. The next step I'd suggest is a quick Human Risk Report so we can show you where the main risks sit and what improvement could look like in practice.

### **Quick tips**

- Let the prospect describe their current pain before pitching
- Use follow-up questions to uncover dissatisfaction
- End every discovery call with a clear next step