COURSE OUTLINE AND DESIGN DOCUMENT

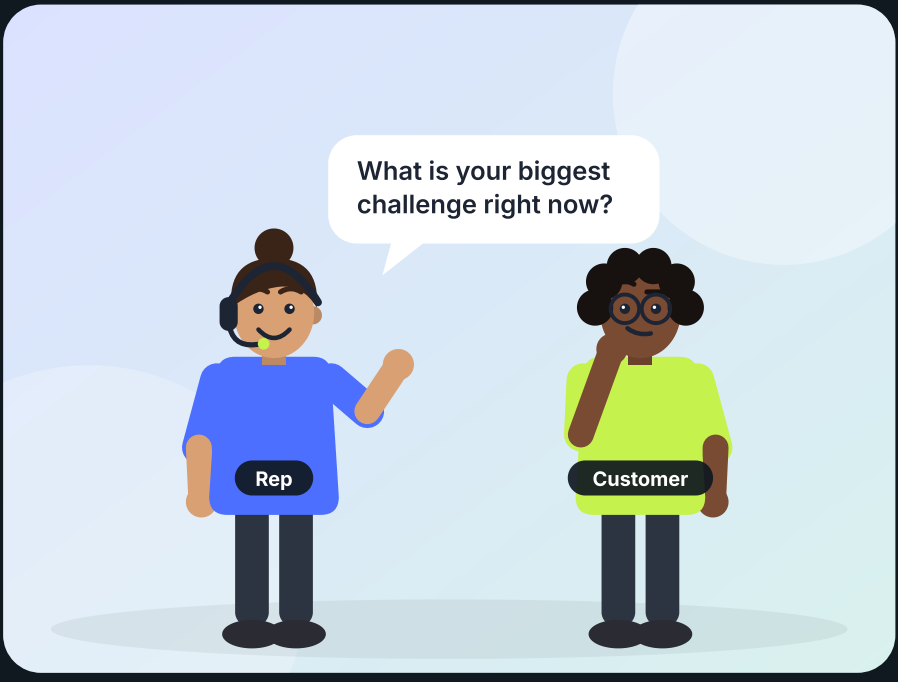
Sales Discovery Calls

Asking better questions to uncover what customers really need.

Blended: self-paced + practice | 90 minutes | New sales reps | SCORM + job aid

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Instructional design portfolio piece 05. An original example project: the organisation, learners and figures are illustrative.

1 · PROJECT SNAPSHOT

The course at a glance

New sales reps often jump to pitching before they understand the customer. This course teaches a repeatable discovery-call structure so reps ask better questions, listen more, and qualify opportunities faster.

Item	Detail
Course title	Sales Discovery Calls: Asking Better Questions
Format	Blended: three short self-paced SCORM modules, one facilitated role-play session, one job aid
Total learning time	90 minutes (45 min self-paced, 45 min practice)
Audience	New sales development reps, first 60 days
Delivery	LMS (SCORM 1.2), plus a live practice session by video or in person
Pass requirement	80% on the scenario assessment and a satisfactory role-play rubric score
Sponsor	Head of Sales Enablement (illustrative)

The performance problem

What is happening now

- Calls spend most of their time on features and price.
- Reps ask closed questions and accept vague answers.
- Opportunities reach the next stage without a clear need or decision process.

What good looks like

- Reps open with purpose and agree an agenda.
- They ask open, layered questions and summarise back.
- They record need, impact, timeline and decision process before moving on.

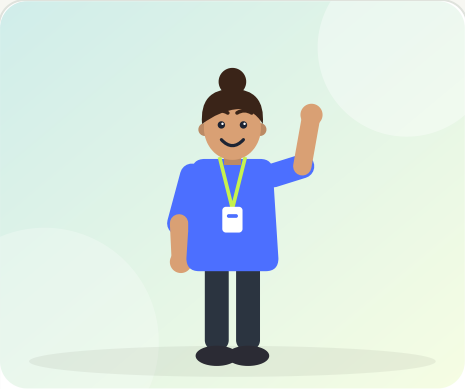
Proposed measures of success. Share of calls where the rep talks under 50% of the time, completeness of discovery notes in the CRM, and manager call-review scores. Targets would be set with the sponsor after a baseline review.

Constraints and assumptions

- Learners have LMS and CRM access; recorded calls can be reviewed with consent.
- Managers can attend one practice session per cohort; content must work on a phone.

2 · AUDIENCE ANALYSIS

Who we are designing for



Maya, new sales rep
Week 3 · inside sales · 2 years in customer support

Learners are motivated and quick to learn the product, but nervous about asking probing questions in case it feels pushy.

1. **Motivation.** Want to hit quota early and sound credible.
2. **Prior knowledge.** Strong product and customer-service skills, little formal sales method.
3. **Barriers.** Fear of silence, pressure to demo, habit of answering instead of asking.
4. **Context.** Back-to-back calls, remote, learn in short gaps.

Task analysis: what a strong discovery call involves

#	Task	Observable behaviour
1	Open and set the agenda	States purpose, checks time, confirms what the customer wants from the call
2	Explore the situation	Asks open questions about current process, goals and pain points
3	Dig into impact	Asks "what happens if..." questions and quantifies the effect
4	Understand the decision	Identifies who decides, the timeline and the budget process
5	Summarise and agree next step	Plays back needs in the customer's words and confirms a dated next step

5
core tasks to master

3
self-paced modules

1
practice session with feedback

3 · LEARNING OBJECTIVES

What learners will be able to do

Each objective is observable and measurable, and each is tied to the way it will be assessed.

#	Level	By the end of the course, the learner can…	Assessed by
1	Remember	List the five parts of the discovery-call structure in order.	Knowledge check
2	Understand	Explain why open questions uncover more than closed ones, using an example.	Scenario question
3	Apply	Open a call with a clear purpose and agenda in under 60 seconds.	Role-play rubric
4	Apply	Ask at least four open, layered questions about situation, problem and impact.	Role-play rubric
5	Analyse	Identify the missing information in a set of discovery notes and name the next question to ask.	Notes review task
6	Apply	Summarise needs back to the customer and agree a dated next step.	Role-play rubric

Writing objectives that can be tested

Weak

"Understand the importance of questions." There is no way to see or test this.

Strong

"Ask four open questions in a ten-minute call." Anyone can observe it and score it.

Design rule. If an objective has no assessment and no practice activity, it is removed. If an activity supports no objective, it is cut.

Modules, activities and timing



Module	Content	Learning activities	Time
1. Open with purpose	Why discovery matters; the five-part structure; agenda setting	Short lesson with a character guide; model-call video; sort-the-steps activity; knowledge check	12 min
2. Explore and dig	Open versus closed questions; layered follow-ups; impact questions	Interactive question builder; two decision scenarios with feedback; job aid preview	18 min
3. Summarise and agree	Playing back needs; handling vague answers; confirming next steps	"Fix the notes" task; short branching scenario; scored scenario assessment (80% to pass)	15 min
4. Practice session	Facilitated role-play with peers and a manager	Three-person role-play with observer rubric; feedback huddle; action plan	45 min

Media and interaction plan

2 videos
Model call (good) and a "what went wrong" comparison, animated with original characters.

4 scenarios
Realistic customer replies with consequences and coaching feedback.

1 job aid
One-page question bank and call checklist for use during live calls.

5 · INSTRUCTIONAL STRATEGY

How the design helps people change what they do

The strategy is built on practice and feedback, not information. Learners see a model, try it in a safe place, and get coaching before they use it on a real customer.

1. **Show a model.** A short animated call demonstrates the structure and the tone.
2. **Break it down.** Learners label each part of the call and sort mixed-up steps into the right order.
3. **Practise decisions.** Scenario questions let learners choose the next question and see the customer's reply.
4. **Give feedback that coaches.** Each choice has its own explanation, so mistakes teach something specific.
5. **Transfer to the job.** A job aid and a role-play session link the course to real calls.
6. **Reinforce.** Two short follow-up questions arrive in week two and week four.

Design principles

Principle	How it shows up in this course
One idea per screen	Short lessons that work on a phone between calls
Realistic practice	Scenarios use real objections, silences and vague answers
Immediate feedback	Every option explains why it works or does not
Spaced retrieval	Follow-up questions at one and three weeks after the course
Accessible by default	Captions on all video, colour never the only signal, keyboard-friendly controls

Why blended? Self-paced modules are efficient for knowledge and decision-making. Speaking skills need live practice, so the facilitated session is where the behaviour is built.

6 · ASSESSMENT PLAN

How we will know it worked

Type	What	Evidence and pass mark
Formative	Knowledge checks and scenario questions inside each module	Immediate feedback; unlimited attempts; not scored
Summative (online)	Eight-question scenario assessment	80% to pass; score and status reported to the LMS through SCORM
Performance	Observed role-play call (ten minutes)	Rubric below; satisfactory on all four criteria
On the job	Manager review of two recorded calls in week four	Same rubric, used as a coaching tool

Role-play observer rubric

Criterion	Developing (1)	Proficient (2)	Strong (3)
Opening	Starts pitching; no agenda	States purpose and checks time	Agrees an agenda and what the customer wants from the call
Questioning	Mostly closed questions	Open questions about situation and problem	Layered follow-ups that uncover impact
Listening	Interrupts or fills silences	Lets the customer finish; some paraphrasing	Reflects back accurately and checks understanding
Next step	Ends without a plan	Suggests a next step	Summarises needs and agrees a dated next step

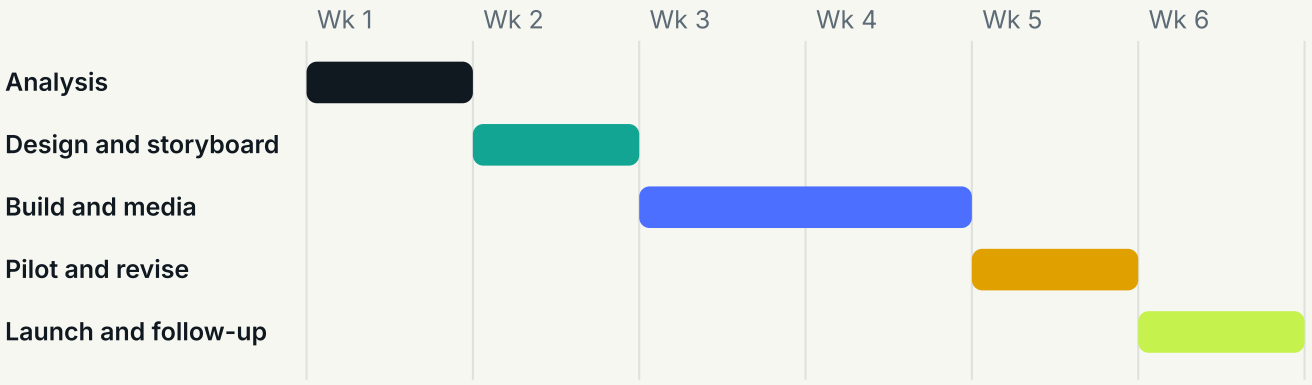
Scenario question example

The customer says, "We are happy with our current provider." Which reply keeps discovery moving? A: Offer a discount. B: Ask what they would change if they could. C: Send the brochure.

Why the rubric matters

A shared rubric makes feedback fair, consistent and specific, and it doubles as a checklist learners can use in real calls.

Timeline, roles and risks



Role	Responsibility
Instructional designer	Analysis, outline, storyboard, build, testing, packaging
Sales enablement lead (sponsor)	Approves objectives and rubric; supplies real examples
Subject-matter expert	Reviews accuracy of scenarios and question bank
Pilot cohort (6 reps)	Completes the course and gives feedback

Risks and how we manage them

Risk	Mitigation
Managers cannot attend the practice session	Peer-led version with the rubric and a recorded debrief
Scenarios feel unrealistic	SME review and real call examples in week 2
Low completion on mobile	One idea per screen, 12 to 18 minute modules, mobile testing
Skills fade after the course	Job aid plus spaced follow-up questions in weeks 2 and 4

8 · EVALUATION

Measuring impact beyond completion

Completion shows people finished. Evaluation shows whether anything changed. The plan follows four levels, from reaction to results.

Level	Question	Method	When
1 · Reaction	Was it relevant and engaging?	Three-question survey at the end	Day of course
2 · Learning	Did they learn the skills?	Scenario assessment and role-play rubric	During course
3 · Behaviour	Are they using it on calls?	Manager call review and CRM note completeness	Weeks 4 and 8
4 · Results	Is the business better off?	Stage-to-stage conversion and sales-cycle length versus the baseline	Month 3

Next steps

1. Confirm
Agree objectives, rubric and baseline measures with the sponsor.

2. Storyboard
Write the screen-by-screen storyboard and the two model-call scripts.

3. Pilot
Build modules, run a six-person pilot, and revise before launch.

Sign-off. Approving this outline confirms the audience, objectives, scope, assessment approach and timeline. Changes after approval are handled through a short change note.

Approved by	Role	Date