

The 4:2 Discovery Worksheet

Four zones. Two questions each. Answer from behavior first, confirm in conversation.

01 RELATIONSHIP

Do they trust us yet?

Q1. How much time have they invested with us?

Signals to read: Return visits, session count, days since first touch, content consumed.

Q2. Are they consuming our content — or just our pricing?

Signals to read: Ratio of educational content views to pricing/availability views.

02 MOTIVATION

What's actually driving them?

Q1. What life event is behind this search?

Signals to read: Job change, marriage, growing family, retirement, downsizing, relocation.

Q2. What's the timeline pressure — self-imposed or external?

Signals to read: Move-in date, lease end, school year, closing on current home.

03 DISSATISFACTION

What's wrong with where they are today?

Q1. What are they moving AWAY from?

Signals to read: Space, location, cost, layout, neighbors, commute, condition.

Q2. How acute is the pain — annoyance or crisis?

Signals to read: Language cues, urgency in inquiries, frequency of return visits.

04 FUTURE PROMISE

What does 'solved' look like?

Q1. What does the 'after' picture look like for them?

Signals to read: Saved favorites, configurator choices, must-haves in inquiries.

Q2. Who else has to say yes to that picture?

Signals to read: Spouse, parents, financial partner, employer — multi-visitor patterns.

HOW TO USE THIS WORKSHEET

- Before the call: fill in what you can from behavior alone — CRM, analytics, site tools.
- On the call: confirm your reads with open questions. Do not re-interrogate.
- After the call: update the zone that changed most. That's your next-step trigger.
- One worksheet per opportunity, refreshed weekly. Motivation is not static.