SALES AND FINANCE

Discovery call notes template

A structured note sheet for turning a sales conversation into useful scoping inputs instead of a vague memory.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You have a discovery call and need details that delivery can actually use.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Capture the desired outcome**
- [ ] 02 **List current process and tools**
- [ ] 03 **Note constraints**
- [ ] 04 **Ask about stakeholders**
- [ ] 05 **Confirm timing and budget signals**
- [ ] 06 **Write the agreed next step**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.