Discovery meeting mistakes you’re (probably) making—and how fixing them boosts your bottom-line.

**CHALLENGE:** Most advisors have a home-grown, somewhat disorderly first meeting “Discovery Process” that generally works but that is also a mystery to them, despite its central importance to their practice.

The impact of an unexamined Discovery Process described as loose or not highly organized:
- Inefficient
- Inconsistent
- Uncertain
- No feedback
- Can’t be replicated

**Discovery Process survey of advisors reveals:**
- Self-created process
- True effectiveness unknown beyond simple next meeting agreement
- 1, 2, or 3 meetings? It’s your own approach but is it your best approach?

**INSIGHT #1:** There’s no widely accepted first-meeting Discovery approach that’s considered the most effective, efficient, and client-centered.

How many meetings to typical close:
- 13% close in one meeting
- 51% close in two meetings
- 30% close in three meetings
- 6% take four or more meetings to close

**Observation:** A profession that has so much agreement about the services and solutions it provides consumers has a wide range of approaches to turning prospects into clients.

**INSIGHT #2:** Because your Discovery Meetings happen in private, it’s difficult to get relevant feedback into whether your process is fully effective and could be improved since only prospects observe you.

Prospect closing rates vary widely:
- 32% close in the 90% or more range
- 50% close in the 70–80% range
- 18% close below 70%

Advisors say their Discovery Process been very changeable over the years:
- 60% say it has changed a lot
- 40% say it’s mostly the same as when they first started in this business or has changed a little bit

**INSIGHT #3:** You need an organized, replicable discovery meeting process, so it’s possible to know EXACTLY what’s working and not working.

Most advisor admit their process isn’t very organized:
- 13% rate their process as “very loose”
- 36% rate their process as “highly organized”

Most advisor have never had formal discovery training:
- Only 46% have had formal training
- 43% say their Discovery Process is “self-made”

Get your Discovery Process critiqued, finally know what really works (and why), and transform your approach to add new clients with greater ease and efficiency... See page 2 for details
The Discovery Lab is the only program of its type that helps you improve your meeting process through its three-part virtual training series.

- Get your first-meeting process recorded and critiqued by the Discovery Lab team…
- Learn what really motivates prospects to accept your offer to become a client and why…
- Gain critical insights into your process so you can boost results and revenue by 10%, 20%, 30%, or more…

Join the Discovery Lab program to get a private, objective analysis of your Discovery Meeting and go through the program’s “Discovery Meeting: Tools of Successful Advisors” workshop.

Our research with advisors has made clear there are practical solutions to running better, more effective, more profitable Discovery Meetings.

**PHASE ONE**

**Your first-meeting discovery analyzed**

We’ll start with your current process. You’ll conduct your typical first meeting with our Discovery Lab “prospects couple,” actors who will meet with you in Zoom.

- Get your first-meeting process recorded and critiqued by the Discovery Lab Team…
- Learn what really motivates prospects to accept your offer to become a client and why…
- Gain critical insights into your process so you can boost results and revenue by 10%, 20%, 30%, or more…

**PHASE TWO**

**Transform your discovery process (live virtual workshop)**

- Two-day virtual workshop, three hours each day
- On-demand workshop recordings available

**Goal:** Learn the full range of Discovery Meeting approaches

**Objective:** Identify exactly how and what changes and improvements you’ll make to your Discovery Process and how to begin introducing them into your Discovery Meetings.

**Go ahead and sign up now:** Because you are a Master Member, the Discovery Lab program fee of $3,247 will be discounted 25% for a $2,435.25, our introductory pricing for this exclusive program.

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