



Initial Discovery Conversation Guide



Company Name _____

Contact Name _____

Cold Open [Tone > Words]: *“This is [Name] from Beemac, and I was pointed in your direction. I work in logistics, and I service your [market/area/city/industry] and I’m hoping to have a conversation to understand your operation to see if it makes sense for us to potentially do some business together. I have available capacity and I’m hoping to get them loaded!”*

Expected Rebuttals

CUSTOMER/VENDOR ROUTED/OWN TRUCKS

- “Is that for inbound and outbound?”
- “Is there ever a time you need to find a truck yourself?”
- “If something misses, how does that affect your operation/you personally?”
- “How often are you experiencing issues?”
- “Have you explored alternative options to make everything easier/cheaper/faster?”

SLOW RIGHT NOW

- “What volume are you shipping now per day/week/month?”
- “When does your busy season pick up?”
- “I’m going to have capacity in your area, I’d like to keep the dialog open just in case.”

WE DON’T USE BROKERS/!” ASSETS ONLY”

- DO NOT PROMISE ASSETS, ALWAYS DEFAULT TO NEEDING A FOLLOW UP MEETING!**
- “We would be happy to see if our Assets could be a match, but would need to get some additional information first”
- “Is that personal preference, or company policy?”
- “We’re happy to provide whichever option makes the most sense”

Listen – Assess – Isolate – Reframe

| | |
|--|--|
| Where are your shipping locations? | |
| Main markets you ship to? | |
| Specific commodity details? | |
| What type of service and equipment do you require? | |
| What is your tendering method and who routes your freight? | |
| What is estimated total volume? | |
| Seasonal peaks/valleys? | |
| Estimated transportation spend? | |
| Biggest issues currently faced with? | |
| What is most important for you/your company when it comes to awarding freight? | |
| Additional Comments: | |

Initial Benefit Statement: Wrap up the call by indicating that you believe you can add specific *value* to one of their pain points and arrange a follow up meeting to review the strategically sourced solution. **DON'T JUMP TO FULFILLMENT.**

Mutually Agreed Upon, In the Calendar, Next Step Follow-Up [Time Agenda Outcome]: