Clover ERA

Prospect Discovery Template

This template guides discovery conversations to understand prospect needs, qualify fit, and identify opportunities where Clover ERA can deliver measurable ROI. Complete before and during discovery calls to ensure comprehensive understanding of prospect situation.

> **The 70% Truth: Managers control 70% of engagement but get 0% of the tools. This discovery process identifies how we can empower their managers to become retention champions.**

1. Pre-Call Research

Complete this section before the call using LinkedIn, company website, and industry research

Date:	
Company Name:	
Industry:	
Company Size (Employees):	
Estimated # of Managers:	
Website:	
LinkedIn Profile:	

Pre-Call Intel

What public information suggests engagement challenges?

(e.g., Glassdoor reviews, LinkedIn posts about culture, recent news about layoffs or restructuring)

What is their current tech stack?

(e.g., HRIS systems, communication tools, existing engagement platforms)

Who are the key decision makers and influencers?

(e.g., CHRO, VP HR, Head of People, progressive managers)

2. Contact Information & Meeting Details

Primary Contact Name:	
Title:	
Email:	
Phone:	
How did they find us:	
Meeting Type:	(Initial Discovery / Demo / Follow-up)

Other Stakeholders Present

Name & Title:	
Name & Title:	
Name & Title:	

3. Current Situation & Pain Points

The Engagement Reality Check

What's driving your interest in improving employee engagement right now?

(Look for: recent turnover spike, low engagement scores, manager effectiveness concerns, specific incidents)

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What does employee turnover look like for you currently?

(Get specifics: overall rate, voluntary vs involuntary, high-risk departments, time-to-fill)

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What's the cost when someone leaves?

(Help them calculate: Average salary × 1.5 to 2.0 for true replacement cost including lost productivity, recruiting, training)

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ROI Framework: A $50K employee actually costs $217K to replace (1.5x salary for direct costs + hidden costs). Each manager preventing 1 resignation = 73x ROI on $295/month investment.

Current Measurement Approach

How are you measuring engagement today?

(e.g., annual surveys, pulse surveys, exit interviews, nothing formal)

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What's working with your current approach? What's not?

(Look for: data delays, low response rates, lack of actionable insights, manager frustration)

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When you get engagement data, what happens with it?

(Identify: who sees it, how quickly, what actions get taken, manager empowerment level)

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4. The Manager Reality

This is where Clover ERA's unique value becomes clear

How equipped are your managers to actually improve engagement on their teams?

(Look for: training provided, tools available, confidence level, success stories)

Do your managers get their own engagement data for their specific teams?

(Identify the gap: HR gets company data, managers get nothing or delayed aggregates)

What happens when a manager senses someone might be disengaging?

(Look for: early warning systems, intervention tools, waiting until exit interview)

How much time do your managers spend on engagement activities?

(Identify: meeting frequency, one-on-one quality, proactive vs reactive time)

The Manager Gap: Gallup shows managers control 70% of engagement variance. Yet most get zero real-time data, zero specific actions, zero dashboard. This is Clover ERA's entire positioning.

5. CLOVER Framework Alignment

Identify which CLOVER elements resonate most with their challenges

Communication

How would you rate communication transparency in your organization?

(1-10 scale, then dig into: what's working, what's not, manager communication quality)

Learning

How are professional development opportunities communicated and accessed?

(Look for: visibility issues, manager coaching capability, growth path clarity)

Opportunity

Do employees know about internal opportunities before external recruiting starts?

(Identify: internal mobility rate, promotion transparency, career pathing)

Vulnerability

How comfortable are people admitting mistakes or asking for help?

(Assess: psychological safety, burnout concerns, manager vulnerability modeling)

Enablement

What obstacles prevent your people from doing their best work?

(Look for: tools, processes, decision-making authority, resource issues)

Reflection

How often do teams reflect on what's working and what needs improvement?

(Identify: retrospective frequency, learning culture, continuous improvement mindset)

Top 2-3 CLOVER elements to emphasize:

6. Budget & Decision Process

Investment Framework

What's the current budget allocated to engagement initiatives?

(Get specific: annual surveys, tools, programs, training)

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How do you typically evaluate ROI on people investments?

(Understand: metrics used, approval process, success criteria)

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Pricing Context: $295/manager/month. 5 managers = $1,475/month. Pilot: 3 managers at $750/month (15% discount). Each manager preventing 1 resignation = $150K+ saved.

Decision-Making Process

Who needs to approve this investment?	
What's the typical timeline for decisions like this?	
What other solutions are you evaluating?	
What would make this a no-brainer yes?	
What concerns might come up from leadership?	

Is there a specific budget cycle or timing we should be aware of?

(Q4 planning, fiscal year, pending budget approvals)

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7. Implementation Readiness

If we move forward, how quickly would you want to start?

(Gauge urgency: immediate crisis, Q4 planning, exploring for next year)

Which managers would you want in a pilot program?

(Look for: champions, high-risk teams, diverse departments)

What would success look like 90 days after launch?

(Define: specific metrics, qualitative outcomes, manager feedback)

What technical requirements do we need to know about?

(Identify: SSO needs, data security, IT approval process)

8. Qualification Scoring

Score each criterion 1-5 (1=poor fit, 5=ideal fit) to prioritize follow-up

Criterion	Score (1-5)	Notes
Company Size (100-500 employees ideal)		
Manager Count (5-25 ideal)		
Pain Severity (high turnover/low engagement)		
Manager Tool Gap (currently have nothing)		
Budget Authority/Timeline		
Champion Potential (progressive managers)		
Decision Process Clarity		
TOTAL SCORE (out of 35)		

Scoring Guide:
28-35: Hot prospect - prioritize immediate follow-up
21-27: Warm prospect - nurture with targeted content
14-20: Qualified but timing unclear - long-term nurture
7-13: Poor fit - politely disqualify or refer elsewhere

9. Next Steps & Action Items

Agreed Next Steps:	
Timeline:	
Who Else Needs to Be Involved:	
Materials to Send:	
Follow-up Date:	

Recommended Follow-Up Based on Discussion

10. Discovery Notes & Key Insights

Compelling Quotes or Stories

(Capture specific pain points, emotional responses, or stories that illustrate their challenges)

Red Flags or Concerns

(Note anything that might indicate poor fit, unrealistic expectations, or potential challenges)

Opportunities to Differentiate

(How can we position the 70% manager truth, daily insights, or specific CLOVER elements to stand out?)

Additional Notes

Remember: Every discovery call is about understanding if we can help them turn their managers into retention champions. Focus on their pain, not our product.