















THE DISCOVERY CONVERSATION FRAMEWORK

Guiding Conversations That Uncover What Matters Most



Great advisory conversations follow a clear path.
Each step *uncovers what matters most* and leads to better decisions.

	1	2	3	4	5	6	7
	LISTEN	DISCOVER	DIAGNOSE	PRIORITIZE	STRATEGIZE	EXECUTE	MEASURE
							
	Open the door and build trust.	Explore goals, challenges, and context.	Find root causes and what's really driving the issue.	Focus on the highest-impact opportunities.	Co-create the best approach forward.	Turn plans into action—align and move forward.	Measure results, learn, and improve.
ADVISOR FOCUS	✓ Be present and listen actively.	✓ Ask better questions and dig deeper.	✓ Analyze patterns and identify issues.	✓ Assess impact and focus on what matters.	✓ Develop options and recommend the best path.	✓ Align resources and execute effectively.	✓ Track impact and drive improvement.
KEY OUTCOME	Trust established. 	Clear understanding gained. 	Root causes uncovered. 	Priorities set. 	Strategy aligned. 	Plans executed. 	Results achieved. 



Better conversations. >



Better clarity. >



Better decisions. >



Better results.

Use this framework in every important conversation to deliver exceptional value every time.