

The Fractional CFO Discovery Call Script

How to Run High-Authority Sales Calls Without Pitching, Convincing, or Sounding Like a Salesperson — Even If You Hate Selling

HOW TO USE THIS GUIDE

This is not a script to memorize. This is a structure to follow. Use this on every discovery or strategy call so:

- You stay in control
- You avoid rambling or over-explaining
- You don't feel like you have to "sell"

The goal of the call is simple:

- Diagnose the problem
- Determine fit
- Let the client decide

If you follow this, you'll stop chasing and start getting chosen.

The CFO Discovery Call Structure

1 Step 1: Set the Frame (First 2 Minutes)

Start the call by taking control of the conversation. Say something like:
 "Here's how I like to run these calls. I'll ask a few questions to understand your situation, what's working, and what's not. Then I'll tell you if and how I can help. If it makes sense, we can talk next steps."

This does three things:

1. Removes pressure
2. Positions you as the expert
3. Sets expectations early

2 Step 2: Understand the Business (Not Just the Numbers)

Ask:

1. "Walk me through the business today — what are you focused on right now?"
2. "What's changed over the last 6–12 months?"
3. "Where do you feel the most uncertainty?"

You are not collecting data. You are identifying **decision gaps**.

3 Step 3: Surface the Real Problem

Most clients will describe symptoms. Your job is to go deeper. Ask:

1. "What happens if this doesn't get fixed?"
2. "Where is this costing you the most right now?"
3. "How confident are you in your numbers today?"

This is where urgency is created — naturally.

4 Step 4: Identify Decision Dynamics

You need to understand how decisions are made. Ask:

1. "How are financial decisions currently being made?"
2. "Who's involved when you're making big calls?"
3. "What's missing right now that would make those decisions easier?"

This positions you as a **decision partner**, not a service provider.

5 Step 5: Confirm Fit (Quietly, Not Aggressively)

Instead of pitching, validate alignment. Say:
 "Based on what you've shared, this is typically where I help clients — cash clarity, forecasting, and ongoing decision support."

Then pause. Let them respond. If they lean in, you proceed. If they don't, you don't force it.

6 Step 6: Present the Next Step (Not a Pitch)

Do not dump your services. Say:
 "The way I typically work with clients like you is through a monthly retainer where I'm helping with [outcomes]." Keep it simple:

1. No over-explaining
2. No defending price
3. No long breakdown

Then ask: "Does that sound like what you're looking for?"

7 Step 7: Let Silence Do the Work

This is where most CFOs lose control. They:

1. Keep talking
2. Start justifying
3. Drop their authority

Instead:

- Say less
- Let the client process
- Let them ask questions

Confidence converts better than explanation.

The Key Shift

You are not trying to:

1. Impress them
2. Convince them
3. Sell them

You are there to:

- Diagnose
- Clarify
- Decide if there's a fit

That's it.

Why This Matters

Most fractional CFOs don't lose deals because of pricing. They lose deals because:

1. The call felt unstructured
2. They talked too much
3. They tried to "help" instead of lead
4. They positioned themselves as a service, not a partner

When the call is structured properly:

1. You feel more confident
2. The client trusts you faster
3. Decisions happen quicker
4. Pricing becomes easier

If you want to turn this into a full system where:

1. Calls are pre-qualified before they get to you
2. Clients already see you as the expert before you speak
3. Your positioning, offer, and pipeline all work together
4. And you don't have to "sell" at all

Then let's build it properly.

Book a Free Strategy Session

We'll walk through your current sales process and show you how to structure it so clients come in ready — not skeptical.

square1grp.com/brainstormsession