

Effective Discovery for Account Managers

Role: Transportation Account Manager, FHWA

Series: Example Company Business Development & Account Strategy

June 2025





Case Study

Importance of Discovery

Why is effective discovery critical for Account Managers?
What is an effective discovery?

Learning Objectives

1

Importance of Discovery

Learners will walk away understanding why discovery is a critical, ongoing stage in the Account Management process.

2

Effective Framework

Learners will know how to complete discovery through the account management process.

3

Confidence

Learners will feel confident and natural in discovery ability.

Discovery – The Why

Importance of Discovery

Recent studies reveal critical discovery gaps:

- 85% of B2B sales and account reps struggle to get clients to open up and share business information
- 78% struggle to uncover the business impact of pain points and connect them to metrics
- 72% find it very hard to identify the real business driver for change
- Account managers score lowest on discovery skills before training—but show the strongest growth potential

Importance, *continued*

FHWA Context: The Stakes Are Higher

- \$500+ billion federal contracting market where relationships and understanding matter more than technical specs
- 5+ year strategic planning cycles mean you have one shot to get it right
- Complex stakeholder environments with Congressional oversight, public accountability
- Multi-agency coordination requiring deep political and organizational awareness

Importance, *continued*

The Cost of Poor Discovery

- Wasted proposals on opportunities you were never going to win
- Missed opportunities because you didn't understand the real problem
- Commodity positioning when you could have been a strategic partner

Discovery Framework

Discovery Framework – Key Principle

Discovery isn't interrogation—it's a relationship-building process and strategic intelligence gathering that positions you as the partner who truly "gets it."

The CIRCLE – Discovery Framework

What is *The Circle Framework*?

C - Connect (Golden Circle: Start with WHY they exist)

I - Investigate (SPIN: Situation, Problem, Implication, Need-payoff)

R - Reveal (Uncover business impact AND personal motivations)

C - Clarify (Confirm understanding and true priorities)

L - Link (Connect your capabilities to their strategic goals)

E - Engage (Secure access and ongoing intelligence gathering)

The CIRCLE – Discovery Framework

Brainstorm & Resource

What are questions we can ask that align with each part of the framework?

Access desk resource [here](#).

Strategic vs. Tactical Discovery

Levels of Discovery

Two Levels of Discovery

1 - TACTICAL DISCOVERY (Everyone Does This)

Budget and timeline

Technical specifications

Procurement process

Decision criteria

Levels of Discovery

Two Levels of Discovery

2 - STRATEGIC DISCOVERY (Top Account Managers Do This)

Political pressures and external influences

Career implications for key stakeholders

Organizational goals and strategic initiatives

Success metrics beyond the project scope

Levels of Discovery – Key Principle

Map the Ecosystem

Who influences the decision?

Who actually makes the decision?

Who implements the solution?

Who benefits from success?

Who bears the risk of failure?

Levels of Discovery – Final Thoughts

When you understand both the technical requirements AND the strategic context, you can position your solution as the clear choice—even at a premium price.

Practice

Practice

Before our next session tomorrow, take 15-20 minutes with your colleagues and practice at your desks.

[Practice One-Sheet](#)

Next Session

Tomorrow we'll cover:

- Common Discovery Pitfalls to Avoid
- Your Individualized Discovery Action Plan
- Roadmap from Vendor to Strategic Partner



Any questions? Ask away!

Let's discuss any doubts or concerns.
If something comes up later, contact@tiffmryan.com

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Appendix

Citations (APA)
CIRCLE Framework One-Sheet
Homework - Practice (Scenarios)