



SALES TRAINING GUIDE

DISCOVERY QUESTIONS

Building Trust Through Curiosity, Solutions &
Strategic Conversations

VISION CARE DIRECT

SALES ENABLEMENT

SIMPLE. FLEXIBLE. AFFORDABLE.

CONTENTS

- 1 Purpose of This Guide
- 2 The VCD Discovery Framework
- 3 Discovery Questions for Brokers
- 4 Discovery Questions for Employers
- 5 Discovery Questions for Doctors & Providers
- 6 Discovery Questions for Provider Staff
- 7 Active Listening Training
- 8 Powerful Follow-Up Phrases
- 9 The Most Important Principle

How to use this guide. Sections 3 through 6 are the working question banks — one per audience. They are meant to be skimmed before a call, not memorised or read aloud in order. Sections 1, 2 and 7 are the coaching content behind them.

1 PURPOSE OF THIS GUIDE

NOT TO

- interrogate,
- pressure,
- trap,
- or rush toward a quote.

BUT TO

- understand challenges,
- uncover frustrations,
- build trust,
- identify opportunities,
- and position Vision Care Direct as a strategic partner and problem solver.

The best sales professionals are not “vision plan peddlers.”

They are:

- educators,
- consultants,
- listeners,
- and trusted advisors.

This guide helps Sales Directors:

- improve communication,
- deepen conversations,
- uncover emotional drivers,
- and create meaningful long-term relationships.

CORE SALES PRINCIPLE

“The person asking thoughtful questions controls the quality of the conversation.”

Most competitors:

- talk too much,
- pitch too early,
- and fail to truly understand the stakeholder.

VCD should be different.

2 THE VCD DISCOVERY FRAMEWORK

1

Build Comfort

GOAL

- Lower defenses
- Create a conversational atmosphere
- Show genuine interest

2

Understand Their Current Reality

GOAL

- Learn how things currently work
- Identify frustrations
- Understand decision-making processes

3

Uncover Problems & Consequences

GOAL

- Discover pain points
- Understand emotional impact
- Quantify problems where possible

4

Explore Goals & Opportunities

GOAL

- Discover what “better” looks like
- Identify unmet needs
- Position VCD naturally

5

Earn Permission to Continue

GOAL

- Avoid hard selling
- Gain trust for the next conversation
- Establish credibility

IMPORTANT TRAINING RULE

30%
TALK

70%
LISTEN

The more the stakeholder talks:

- the more trust develops,
- the more information is uncovered,
- and the more likely they are to emotionally buy in.

3 DISCOVERY QUESTIONS FOR BROKERS

GOALS:

Understand:

- broker frustrations,
- client concerns,
- gaps in current plans,
- and opportunities for differentiation.

RELATIONSHIP-BUILDING QUESTIONS

"How long have you been working in the benefits space?"

"What types of employer groups make up most of your book of business?"

"What changes have you seen in the vision market over the last several years?"

STRATEGIC DISCOVERY QUESTIONS

"What frustrations do your clients most commonly bring up regarding their current overall benefits?"

"Are you seeking strategies that can help control your clients escalating health care expenditures?"

"Are there areas where you feel traditional vision carriers fall short?"

"How important is provider satisfaction to your clients?"

"What do you wish vision carriers did better to support brokers?"

HIGH-VALUE QUESTIONS

These position VCD as a partner instead of a vendor.

"What helps you stand out most against competing brokers?"

"Where do you see the greatest opportunity to improve the employer benefits experience?"

"What types of benefit solutions create the most long-term client loyalty for you?"

QUESTIONS THAT CREATE OPPORTUNITY

"If you could introduce a new strategy to your clients that directly addressed controlling or even lowering their health care cost would that help you get their attention?"

"Are there groups where you feel the current vision solution simply isn't the right fit anymore?"

"Have you encountered employers looking for something more flexible or provider-friendly?"

WHAT SALES DIRECTORS SHOULD LISTEN FOR**KEYWORDS/PHRASES**

Skyrocketing medical premiums

Employees complain...

Network issues...

Retail pressure...

Limited flexibility...

Poor service...

Price increases...

Claims frustrations...

These are buying signals.

4 DISCOVERY QUESTIONS FOR EMPLOYERS

GOALS:

Understand:

- benefit philosophy,
- employee satisfaction,
- healthcare pressures,
- retention concerns,
- and administrative frustrations.

OPENING RELATIONSHIP QUESTIONS

"Tell me a little about your organization and your workforce."

"What's most important to your team when evaluating employee benefits?"

"How has your benefits strategy evolved over the last few years?"

EMPLOYEE EXPERIENCE QUESTIONS

"What feedback do employees typically give regarding your current healthcare benefits?"

"Do employees generally understand and utilize their benefits well?"

"Have you noticed whether employees value preventive healthcare benefits more today than in the past?"

COST & STRATEGY QUESTIONS

"How much pressure are you under to balance cost control with maintaining competitive benefits?"

"Have rising healthcare costs changed how you evaluate benefit partners?"

"Are you looking for benefits that improve employee satisfaction without dramatically increasing costs?"

OPERATIONAL QUESTIONS

"What tends to create the biggest administrative frustrations with benefit programs?"

"How important is simplicity and service responsiveness when evaluating vendors?"

"How much time does your HR team spend helping employees navigate benefits issues?"

HEALTH & WELLNESS QUESTIONS

These differentiate VCD from "eyeglass discount plans."

"How important is preventive healthcare in your overall benefits philosophy?"

"Do you see value in benefits that may help identify larger health concerns earlier?"

"How important is employee productivity and screen-related eye fatigue in your workforce?"

FUTURE-FOCUSED QUESTIONS

"If you could improve one aspect of your current benefits experience, what would it be?"

"What would an ideal vision benefits partner look like for your organization?"

WHAT SALES DIRECTORS SHOULD LISTEN FOR

BUYING SIGNALS

Healthcare cost pressures

Interest in wellness

Recruiting difficulties

Retention concerns

HR overload

Employee dissatisfaction

Desire for simplicity

5 DISCOVERY QUESTIONS FOR DOCTORS & PROVIDERS

GOALS:

Understand:

- provider frustrations,
- operational pain points,
- reimbursement concerns,
- and practice challenges.

Most importantly:

Show doctors that VCD genuinely understands independent practice realities.

OPENING QUESTIONS

"How long have you been practicing in this community?"

"What changes have impacted your practice the most over the last several years?"

VISION PLAN IMPACT QUESTIONS

"How have traditional vision plans affected independent practices in your opinion?"

"What frustrations do you encounter most often when working with vision carriers?"

"How much pressure have you seen regarding reimbursement reductions or retail competition?"

PATIENT EXPERIENCE QUESTIONS

"What concerns do patients most commonly bring up regarding their vision coverage?"

"Do you feel current vision plans help or complicate the patient experience?"

PRACTICE SUPPORT QUESTIONS

"What could benefit organizations do better to support independent providers?"

"What operational issues create the most frustration for your staff?"

"What would make participation in a vision network feel more worthwhile?"

TRUST-BUILDING QUESTIONS

"If you could redesign the relationship between providers and benefit organizations, what would that look like?"

This question is incredibly powerful.

WHAT SALES DIRECTORS SHOULD LISTEN FOR

EMOTIONAL DRIVERS

Loss of autonomy

Retail competition

Low reimbursements

Staff frustration

Administrative burden

Feeling unheard

6 DISCOVERY QUESTIONS FOR PROVIDER STAFF

GOALS:

Understand:

- workflow frustrations,
- patient communication challenges,
- and administrative pain points.

Provider staff are often the true operational gatekeepers.

OPENING QUESTIONS

"How long have you been with the practice?"

"What part of your role keeps you busiest?"

OPERATIONAL QUESTIONS

"What tends to create the biggest headaches when dealing with vision plans?"

"What issues frustrate patients most often?"

"What processes tend to slow your team down the most?"

SUPPORT QUESTIONS

"What can benefit organizations do better to make your job easier?"

"What helps create a smoother patient experience from your perspective?"

RESPECT-BASED QUESTIONS

"What's something people outside the office probably don't realize about how much your team handles every day?"

This creates enormous rapport.

7 ACTIVE LISTENING TRAINING

DO

- Maintain eye contact
- Take notes
- Pause before responding
- Ask follow-up questions
- Validate frustrations
- Show empathy
- Be curious

DO NOT

- Interrupt
- Rush into presentations
- Over-talk
- Argue
- Defend competitors
- Immediately pitch products

8 POWERFUL FOLLOW-UP PHRASES

These improve trust dramatically.

INSTEAD OF

"Let me tell you about VCD..."



USE

"That's interesting – can you tell me more about that?"

INSTEAD OF

"We can fix that."



USE

"It sounds like that's been frustrating for quite a while."

INSTEAD OF

"Our plan is better."



USE

"That's one of the reasons many organizations are looking for alternatives today."

9 THE MOST IMPORTANT PRINCIPLE

People rarely remember:

- statistics,
- brochures,
- or features.

They remember:

- how the conversation felt,
- whether they felt heard,
- and whether they trusted the person sitting across from them.

That is where VCD has the opportunity to differentiate itself from traditional carriers.

WHY DISCOVERY MATTERS

“The person asking thoughtful questions controls the quality of the conversation.”

Vision Care Direct · Sales Enablement · Discovery Question Guide

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