



Business Discovery Intake Worksheet

Plain-English questions for understanding goals, bottlenecks, repeated work, customer experience, team needs, and first improvement

How to use this worksheet

Complete only what is useful. Short answers are fine. The goal is to identify where the business loses time, repeats work, misses follow-up, or lacks clear processes. Industry-specific questions can be added after the first conversation.

1 Business Snapshot

Business name	
Primary contact	Name, role, phone, email
Website / social pages	
What the business does	One or two plain-English sentences
Main customers	Who buys, books, calls, visits, or relies on the business?
Team size	Owner only / small team / multiple locations / remote team
Service area	Local, regional, online, mobile, or other
Current tools	Examples: email, calendar, POS, CRM, accounting, project management, spreadsheets

2 Goals and Success

These questions clarify what would actually matter to the business, not just what sounds interesting.

Top 30-90 day goal	What needs to improve soon?
Biggest current frustration	What keeps showing up as a problem?
Desired result	What would make this work feel successful?
What should not change	Any customer experience, tone, quality, or process that must be protected?
Decision-maker	Who approves changes, tools, workflows, or new processes?

3 Repeated Work and Bottlenecks

Look for work that happens often, takes longer than it should, or depends too much on one person's memory.

<input type="checkbox"/> Customer emails	<input type="checkbox"/> Follow-up messages	<input type="checkbox"/> Estimates or proposals
<input type="checkbox"/> Scheduling or reminders	<input type="checkbox"/> Social posts	<input type="checkbox"/> Review replies
<input type="checkbox"/> Website or service copy	<input type="checkbox"/> Meeting notes	<input type="checkbox"/> Internal checklists

PUBLIC COPY

<input type="checkbox"/> Training new staff	<input type="checkbox"/> Customer FAQs	<input type="checkbox"/> Reports or summaries
<input type="checkbox"/> Research	<input type="checkbox"/> Invoices or payment reminders	<input type="checkbox"/> Data entry
<input type="checkbox"/> Inventory or job notes	<input type="checkbox"/> Complaints or service recovery	<input type="checkbox"/> Other repeated task

Pick the 3-4 repeated tasks with the highest value or irritation.

Opportunity	How often?	Time spent now	Pain level	What would better look like?
			Low / Medium / High	
			Low / Medium / High	
			Low / Medium / High	
			Low / Medium / High	

4 Customer Communication and Experience

These questions help uncover missed follow-up, inconsistent tone, or repeated customer confusion.

Most common customer questions	
Where customers get stuck	Before buying, booking, paying, arriving, approving, or following instructions
Follow-up gaps	Where do leads, customers, or past clients fall through the cracks?
Tone and brand voice	How should messages sound? Friendly, direct, premium, careful, casual, formal, etc.
Reviews and feedback	What do customers praise or complain about most often?
Current response time	How quickly are messages usually answered? What slows that down?

5 Team, Knowledge, and Process

These questions reveal where simple SOPs, checklists, templates, or shared knowledge could reduce repeated explanations.

Tasks only one person knows	
Training pain points	What takes too long to explain to new or backup team members?
Missing SOPs	Which process needs a clear step-by-step guide?
Quality checks	What must be reviewed before anything goes to a customer, vendor, or public page?
Where information lives	People's heads, notebooks, email, shared drive, software, spreadsheet, paper forms, etc.
Team comfort level	Low / medium / high comfort with new tools or workflow changes

6 Tools, Information, and Readiness

This is not a technical audit. It simply checks whether the right information and access are available before any work begins.

Main software or tools	
Important files or examples	Emails, proposals, estimates, FAQs, posts, scripts, checklists, forms, job notes
Sensitive information	What should not be entered into outside tools?
Account access	Who has login access to the tools needed for the session?
Approval process	Who reviews drafts, templates, SOPs, public messages, or customer-facing content?
Constraints	Budget, time, compliance, privacy, customer expectations, staffing, seasonality

7 Where Simple AI Assistance Might Help First

Check any area that could be useful. These are practical starting points, not promises or final recommendations.

<input type="checkbox"/> Drafting clearer emails	<input type="checkbox"/> Turning messy notes into summaries	<input type="checkbox"/> Creating customer follow-up templates
<input type="checkbox"/> Writing first drafts of SOPs	<input type="checkbox"/> Building training checklists	<input type="checkbox"/> Organizing FAQs
<input type="checkbox"/> Creating social post drafts	<input type="checkbox"/> Improving website copy	<input type="checkbox"/> Preparing meeting agendas
<input type="checkbox"/> Comparing options or research notes	<input type="checkbox"/> Writing proposal or estimate language	<input type="checkbox"/> Creating review response templates
<input type="checkbox"/> Building a prompt/template library	<input type="checkbox"/> Reducing repeated internal questions	<input type="checkbox"/> Helping a team use one process

8 Opportunity Scorecard

Use this to choose a first pilot that is valuable, realistic, and low enough risk to test quickly.

Question	Low	Medium	High	Notes
How much time or money could this improve?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
How often does the problem happen?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
How easy is it to test safely?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
How clear is the owner or decision-maker?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
How ready are the examples, files, or details?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
How risky would a mistake be?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

9 First Pilot Candidate

Pilot workflow	What one task should be improved first?
Current process	How is it handled today?
Proposed first improvement	Template, checklist, prompt library, SOP, follow-up process, etc.
Success measure	Minutes saved, faster response, fewer revisions, fewer repeated questions, better consistency
Owner	Who will use it, maintain it, and give feedback?
Review rule	What must be checked by a human before use?
7-14 day follow-up	What should be reviewed after the first test period?

Simple positioning statement

The first goal is not to replace people or overhaul the business. The first goal is to find repeated work, create reusable support materials, keep humans responsible for final judgment, and prove value with a simple before-and-after measure.