

Discovery Form

Name	Title
Email	Phone
Company Name	Company Website

Employees

Company Type

For Profit

Nonprofit

Introduction and Background

What products or services does your company offer?

Where can customers purchase your products or services?

In-Person

- Brick-and-Mortar Store
- Third-Party Resellers
- Local Events

Remote

- E-commerce Websites or Marketplaces
- Your Website or Mobile Application
- Phone
- Mail-order catalogs or Television Shopping Channels

Current Challenges

What are the main challenges or pain points your business is currently facing?

Are there any specific areas where you're struggling to achieve your goals? *(Check all that apply)*

Marketing *(website, branding, social media, ads, analytics, content creation, printed materials, SEO, etc.)*

Event Planning *(any kind—conferences, workshops, webinars, fundraisers, employee, team, etc.)*

Experience or People Operations *(Regarding Customers, Employees, Volunteers, Board, Donors, etc.)*

Sales Enablement *(sales collateral, processes, CRM set up/management, sequences/script writing, etc.)*

Fundraising Campaigns *(Annual giving, sponsorships, online, crowdfunding, planned giving, fundraisers, etc.)*

Partner Programs & Community Relations *(Identify affiliate, referral, strategic, or reseller relationships, service opportunities, networking opportunities, etc.)*

Strategic Planning *(Organization wide or department-specific)*

Operations *(Efficiencies, technology, processes, etc.)*

How fast do you need support?

ASAP/This Month

Next Month

Next Quarter

6+ Months

Not Sure - Just getting ideas

What is your estimated monthly budget available at that time?

\$0 - \$25 /month

\$25 - \$250/month

\$250 - \$500/month

\$500 - \$1500/month

\$1500 - \$3000/month

\$3000 - \$5000/month

>\$5000

1-time budget of

Project budget of for

Notes