

This is a starting set of questions that guides my first discovery session with clients. I customize it based on the particular business and the specifics of the project, adding or taking away some of the questions. Often the answers lead to other questions which allows me to dig deeper. Depending on how many people are in the room on the client side and how talkative they are, it usually takes about 3 hours to get through this discussion.

Feel free to integrate these into your own process of interviewing - and listening to - clients. I'd also love to hear if you have great questions to add to this list! - Jennifer Faulkner, Proposify jennifer@proposify.com

1. Who is <BUSINESS>?
2. Why this project now?
3. What story does your brand tell now?
4. How would you describe <BUSINESS> in a sentence?
5. In two words?
6. In one word?
7. At a 10,000 ft. level, what 'business' do you think <BUSINESS> is in?
8. What is the goal/purpose of <BUSINESS>?
9. When you joined <BUSINESS>, what was its irresistible appeal? What does it offer that no one else came close?
10. What do you imagine is its NOBLE reason for being?
11. What is the compelling and unique selling point?
12. What does success look like?
13. What is your vision in 5 years?
14. What is <BUSINESS> greatest strength?
15. What is your weakness be compared to the competition?
16. What are you offering over competitors?
17. How does it benefit the customer?
18. What is <BUSINESS> an expert in? What are you NOT an expert in?
19. What promises do you make in your sales pitch? How are you going to deliver on that?
Do you deliver every time? Why not?
20. What problem do you solve for people?
21. A PERFECT <BUSINESS> would do a lot more _____ and a lot less _____.
22. What do you believe <BUSINESS> legacy to be?
23. Are there any pre-existing impressions within your industry? Positive/negative?
24. How do you fit into those?
25. Name 3 competitors

26. Who is doing it right? Wrong? How/why?
27. What is their differentiation?
28. Who are we talking to? Who are your clients? Potential new clients?
29. Where are they?
30. What results are they looking for from you?

31. What are they buying?
32. What problem are you solving for them?
33. What is their decision making process?
34. What do they value?
35. What offends them?
36. How do you think they feel about you now?
37. How do you want them to feel about you?
38. How do they want to see themselves?
39. What expected feeling attracts people to <BUSINESS>?
40. What expected feeling will keep them engaged with <BUSINESS>?
41. What expected feeling will draw them away from <BUSINESS>?
42. If you were to set up <BUSINESS> on a blind date, what human qualities would you use to describe their personality to their potential date?
43. What type of clothes does <BUSINESS> wear?
44. When <BUSINESS> goes to a party, how does it behave? Life of the party? Dance floor? Conversationalist? Wallflower? Last to leave?
45. What celebrity best represents the personality of <BUSINESS>?
46. What's the one essential thing you want to say about your business?