

Client Discovery Questionnaire

Marketing & Advertising

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Generates a tailored discovery questionnaire for a sales call or kickoff — business, goals, audience, budget, current marketing and success metrics — so your proposal is on point. Use it before quoting. For the proposal itself use the Agency Proposal Writer.

Purpose of this tool & output

Ask the right questions before proposing

How the output is used

Use it to ask the right questions before proposing — a discovery questionnaire that surfaces goals, budget and constraints.

Important cautions

Adapt to the specific prospect.

Companion documents

- New-Business Pitch Deck
- Agency Proposal Writer
- RFP Response Builder
- Capabilities Deck Builder
- Case Study Writer
- Cold Outreach Sequence

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.