

New client questionnaire

About six minutes. Your answers help us prepare for our first conversation.

Questions marked * need an answer.

About you

1. Your name *

2. Email *

3. Phone

4. Is this for a business or for you personally? *

☐ For my business or organisation

☐ For me personally

5. Company or organisation

Only if "Is this for a business or for you personally?" is For my business or organisation.

6. Your role

Only if "Is this for a business or for you personally?" is For my business or organisation.

7. Website

Only if "Is this for a business or for you personally?" is For my business or organisation.

8. How should we contact you?

☐ Email

☐ Phone call

☐ Text message

☐ Video call

What you need

9. What do you need help with? *

Tick all that apply.

- | | | |
|---|--|---|
| ☐ Strategy and planning | ☐ Marketing and brand | ☐ Website or digital |
| ☐ Operations and systems | ☐ Finance and funding | ☐ Training or coaching |
| ☐ Other: _____ | | |

10. What made you get in touch now?

11. What do you want to achieve? *

12. What would success look like six months from now?

13. What is getting in the way at the moment?

14. Tell us about your business and who your customers are

Only if "Is this for a business or for you personally?" is For my business or organisation.

Scope and timing

15. When would you like to start? *

- ☐ As soon as possible ☐ Within a month ☐ In one to three months
☐ I have a deadline ☐ Just exploring for now

16. What is the deadline?

Only if "When would you like to start?" is I have a deadline.

Date

17. Roughly what budget do you have in mind?

A range is fine. It helps us suggest the right scope.

- ☐ Under \$2,000 ☐ \$2,000–\$5,000 ☐ \$5,000–\$15,000
☐ \$15,000 or more ☐ Not sure yet

18. Who else will be involved in the decision?

19. Have you worked with a consultant, coach or agency before?

- ☐ Yes ☐ No

20. How did it go?

Only if "Have you worked with a consultant, coach or agency before?" is Yes.

21. Anything you would like to share?

A brief, a deck or brand files, up to 10 MB each. Please do not send passwords.

Attach this separately and write what you attached below.

22. How did you hear about us?

- ☐ A friend or colleague ☐ A search engine ☐ Social media
☐ An event or talk ☐ Another business referred me ☐ Other: _____

23. Anything else we should know?

We use your answers to prepare for our first conversation and any proposal, and we do not share them. Privacy policy:

_____.

24. News and tips

☐ Send me occasional news and tips. I can unsubscribe at any time.