

CONSULTING DISCOVERY QUESTIONNAIRE & BRIEF

STRATEGIC CLIENT INTAKE | ORGANIZATIONAL DIAGNOSTIC | NEEDS & SCOPE ALIGNMENT

Client Org: _____ Lead Stakeholder: _____ Date: _____
Lead Consultant: _____ Engagement Type: _____ Status: ☐ Discovery ☐ Proposal

1. STRATEGIC CONTEXT & PROBLEM DEFINITION

What is the primary business challenge or objective prompting this consulting engagement?

Why is addressing this challenge critical now? What triggered the urgency?

2. CURRENT STATE ASSESSMENT & OPERATIONAL BOTTLENECKS

What internal initiatives, solutions, or tools have been attempted previously? What were the limitations?

What internal roadblocks or constraints exist? (e.g., bandwidth, technology stack, governance, budget)

3. TARGET OUTCOMES, METRICS & SUCCESS CRITERIA

What are the specific, quantifiable success metrics and return on investment (ROI) expected from this project?

What is the envisioned completion timeframe and key milestone schedule?

4. BUDGET ALLOCATION & GOVERNANCE STAKEHOLDERS

Allocated Budget Range: ☐ Under \$15,000 ☐ \$15,000 - \$35,000 ☐ \$35,000 - \$75,000 ☐ \$75,000 - \$150,000 ☐ \$150,000+

Key Decision Sign-off Committee: _____

Immediate Next Steps / Phase 1 Deliverables: _____