



# ClearSKai

TECHNOLOGIES

*Where the SKai isn't the limit, it's the starting point.*

DISCOVERY

## Discovery Form

Client interview form for goals, services, customers, market, brand, competitors, offers, and launch priorities.

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PREPARED FOR

CLIENT NAME & COMPANY

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PROJECT / BUILD NAME

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CLIENT EMAIL

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DISCOVERY

# Business Basics & Market

Use during the first serious sales call or onboarding discovery.

COMPANY

PHONE

TRADE / SERVICES

SERVICE AREA

CURRENT WEBSITE

CONTACT

EMAIL

YEARS IN BUSINESS

IDEAL CUSTOMER

TOP COMPETITOR

COMPANY STORY / WHY THEY STARTED

BEST / MOST PROFITABLE JOBS THEY WANT MORE OF



DISCOVERY

# Services, Offers & Calls to Action

Get the real sales message before copywriting begins.

## Core Services

Service	Profitability	Priority	Notes

### CURRENT OFFERS / FINANCING / WARRANTY

## Preferred CTA



Free estimate

Project walkthrough

Call now

Free audit

Financing / payment options

Other

CTA NOTES / OFFER DETAILS



DISCOVERY

# Brand, Proof & Content Inventory

Find the trust material that makes the build convert.

## Brand Direction

- Modern / premium
- Family-owned / local
- Luxury / high-end
- Rugged / trade
- Clean and professional
- Warm and personal
- Bold and aggressive
- Calm and trustworthy

## BRAND NOTES / VISUAL STYLE

## Proof Assets Available

- Logo files
- Brand colors
- Team photos
- Before/after photos
- Reviews/testimonials
- License/bond info
- Insurance info
- Videos
- Drone/hero media
- Case studies



DISCOVERY

# Strategy Notes & Next Step

*Turn discovery into an action plan.*

STRATEGY NOTES

RECOMMENDED SCOPE / PACKAGE

NEXT STEP

FOLLOW-UP DATE

ASSIGNED TO

STATUS