Client Discovery Questions

Understanding your digital presence and goals

These questions help me understand your digital presence and what you're trying to accomplish online. There are no wrong answers. Be honest about your constraints, timeline, and budget. The more I understand upfront, the better I can help (or tell you if I'm not the right fit).

Before we start:

This isn't an interrogation—it's a conversation. If a question doesn't apply to you, skip it. If you don't know the answer yet, that's useful information too.

Your Business Basics

→   What do you do, and who do you do it for?

→   How long have you been doing this?

→   What makes you different from others doing similar work?

→   How do people currently find you or hear about you?

Your Digital Goals & Challenges

→   Why are you thinking about your digital presence right now?

> *What triggered this? New opportunity? Current approach not working? Growing too fast?*

→   What's not working about your current situation?

→   What would success look like 3 months after we finish?

> *Be specific: More inquiries? Easier to update? People actually understanding what you do?*

→   If you do nothing, what happens?

> *Helps me understand how urgent this really is*

Your Current Digital Presence

→ Where do people find you online right now? (Website, social media, Google, directories?)

→ Do you have a website? If yes, what's the URL?

→ What platform is it on? (Squarespace, WordPress, custom, etc.)

If you don't know, that's fine—just tell me who built it or where you log in

→ What do you like about your current site? What frustrates you?

→ Are you active on social media? Which platforms?

Instagram, Facebook, TikTok, LinkedIn, etc. How often do you post?

→ Do you have a Google Business Profile? Is it up to date?

→ Do you send emails or newsletters to customers?

→ Do you update it yourself, or does someone else handle it?

→ What have customers or visitors said about your site?

Even casual comments count: "I couldn't find your hours" or "looks professional"

What You're Trying to Accomplish

→ What do you want your digital presence to DO for you?

> *Examples: Get more customers? Build credibility? Save time answering questions? Showcase work? Take bookings?*

→ Where do most of your customers/clients come from right now?

> *Referrals, walk-ins, Google searches, social media, etc.*

→ What's working well in how you currently connect with people online?

→ What feels like a waste of time or isn't working?

→ If you're thinking about a website: What's the most important thing people should be able to do there?

→ Do you want to manage and update content yourself, or have someone handle it?

→ For a website, what pages or sections do you definitely need?

> *Home, About, Services, Contact, Blog, Portfolio, Menu, Booking, etc.*

→ Do you need bilingual content (English/Spanish)?

Your People & How They Find You

→ Who is your typical customer/client/visitor?

> *Don't say "everyone"—pick your most common type of person*

→ How do people usually discover you? (Referral, Google, social, walking by?)

→ What's the typical path someone takes before becoming a customer?

> *Do they Google you? Check Instagram? Read reviews? Visit in person first?*

→ What questions do people always ask you?

> *Your digital presence should answer these without them needing to call*

→ What would make someone choose you over a competitor?

Brand & Visual Identity

→ Show me 2-3 examples of digital presence you like (websites, Instagram accounts, etc.). What appeals to you?

> *I'm looking for patterns—clean vs busy, colorful vs minimal, professional vs casual*

→ Do you have a logo? Brand colors? Fonts?

→ How would you describe your business's personality in 3 words?

> *Examples: professional/warm/approachable, bold/creative/edgy, calm/trustworthy/expert*

→ What should people FEEL when they interact with you online?

Content & Assets

→ Do you have photos you can use? (Products, space, team, work samples?)

→ Who's writing the content? You or me?

> *If you, I can provide a template. If me, that's a separate scope.*

→ What content do you already have that we can use or adapt?

> *Old site text, brochures, social media bios, business cards?*

Tools & Technical Setup

→ What digital tools are you currently using? (Scheduling, email marketing, payment processing, etc.)

→ What's working well? What's frustrating or confusing?

→ Do you own a domain name? What is it?

→ Do you have hosting? (Or should I recommend something?)

> *If you don't know what this means, say so—I'll handle it*

→ Do you need email addresses at your domain? (like you@yourbusiness.com)

→ What systems need to work together? (Booking, e-commerce, email, social media, CRM?)

Timeline & Constraints

→ When do you need this done?

Be real: Is this "ASAP" or "sometime this year"? Hard deadline or flexible?

→ What's driving the timeline? (Event, season, opportunity?)

→ How much time can YOU dedicate to this project?

For feedback, content review, photo gathering, etc.

Budget Reality Check

→ What's your budget range for this project?

Honesty helps us both. If it doesn't match my rates, I can recommend other options.

→ Are you open to a phased approach? (Launch with essentials, add features later)

→ What's your monthly budget for ongoing costs? (Hosting, domain, platform fees)

Usually $10-50/month depending on platform

Ongoing Management

→ Do you want to manage your digital presence yourself, or have someone help?

Updates, posts, responding to messages, monitoring reviews, etc.

→ How much time can you realistically spend on digital stuff each week?

→ How comfortable are you with technology and learning new tools?

Honest answer—this helps me recommend the right solutions for your comfort level

→ Do you need training or documentation on managing things?

The Honest Questions

➜ Have you worked with someone on your digital presence before? How'd it go?

➜ What are you worried about with this project?

➜ What would make you feel confident that this is going well?

➜ Is there anything I haven't asked that I should know?

What happens next:

After we talk through these, I'll send you a clear proposal with scope, timeline, and cost. If it's a fit, great. If not, I'll be honest about that too and can point you toward better options.