

Faako - Client Discovery Checklist

Introductory / Needs Assessment Meeting (Printable – 1 Page)

1. Business Overview

- Business name:
 - Type of business (sell / rent / both):
 - Years in operation:
 - Owner only or with staff?
 - Main sales channels (Walk-in / WhatsApp / Instagram / Other):
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2. Daily Operations & Pain Points

- How do you currently track sales?
 - How do you track inventory?
 - Any current tools? (Book / Excel / POS / None)
 - Biggest daily challenge or stress point:
 - Any losses from missing stock, money, or bookings?
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3. Inventory & Rentals (Tick what applies)

Sales - Approx. number of items: - Stock runs out unexpectedly? Yes No

Rentals - Track availability by date? Yes No - Ever had double bookings? Yes No - Track damages/returns? Yes No

4. Orders & Payments

- Payment methods accepted: Cash Mobile Money Bank Transfer Other
 - Do you accept deposits or part payments? Yes No
 - Do you issue receipts/invoices? Yes No
 - How do you track profit today?
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5. Customers & Communication

- Keep a customer list? Yes No
- Repeat customers common? Yes No
- How do you notify customers? WhatsApp Calls None
- Would automated notifications help? Yes No

6. Website & Online Presence

- Do you have a website? Yes No
 - Customers ask to see items online? Yes No
 - Interest in a simple business website? Yes No
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7. Staff & Access

- Number of staff:
 - Staff responsibilities:
 - Need different access levels? Yes No
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8. Reporting & Growth

- Review sales regularly? Yes No
 - Would reports help decision-making? Yes No
 - 6-12 month business goal:
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9. Tech Comfort

- Preferred device: Phone Laptop Both
 - Comfort with new systems: Low Medium High
 - Preference: Simple & fast Detailed & flexible
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10. Budget & Readiness

- Used paid tools before? Yes No
 - Open to monthly subscription? Yes No
 - Timeline to start: Immediately Soon Exploring
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Internal Notes (Faako Only)

- Main pain point:
 - Recommended plan:
 - Setup needed:
 - Follow-up actions:
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Faako — by bynana Your business, all in one place.

Faako - Client Proposal Template

(Generated after discovery meeting)

1. Client Summary

Business Name:

Business Type: (Sales / Rentals / Both)

Primary Pain Points Identified:

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Current Tools / Process:

2. Proposed Solution (Faako)

Based on our discussion, **Faako** will help you: - Centralise your business operations in one place - Reduce manual tracking and errors - Improve visibility of sales, rentals, and stock - Save time and improve customer experience

Key Features Included

Inventory management Orders & payments tracking Rental bookings (if applicable)
Customer records Automated notifications Business website

3. Recommended Plan

Plan: Starter / Growth / Pro

Why this plan fits your business:

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Users Included:

4. Setup & Onboarding

One-Time Setup

Includes: - Business account configuration - Website branding (logo, colours) - Inventory upload - Payment setup (Mobile Money / Stripe) - Staff onboarding - Training session

Setup Fee: GHS

5. Pricing Summary

Item	Cost (GHS)
Monthly Subscription	
One-Time Setup	
Optional Add-ons	

Total Monthly: GHS

6. Payment & Integrations

- Mobile Money (MTN / Vodafone / AirtelTigo)
- Bank transfer
- Stripe (for international payments)

Transaction fees charged by payment providers apply.

7. Timeline

- Account setup: 2–3 business days
 - Data & configuration: 2–5 business days
 - Go-live: Within 7 days of approval
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8. Next Steps

1. Proposal approval
 2. Setup fee payment
 3. System setup begins
 4. Training & go-live
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9. Support & Communication

- WhatsApp / Email support
 - Priority support available on Pro plan
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Prepared by: bynana

Product: Faako

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