

# Faako – Client Discovery Checklist

*Introductory / Needs Assessment Meeting (Printable – 1 Page)*

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## 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

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## 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

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## 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 – Client Proposal Template

*(Generated after discovery meeting)*

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## 1. Client Summary

**Business Name:**

**Business Type:** (Sales / Rentals / Both)

**Primary Pain Points Identified:**

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**Current Tools / Process:**

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## 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

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## 3. Recommended Plan

**Plan:** Starter / Growth / Pro

**Why this plan fits your business:**

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**Users Included:**

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## 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

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## 5. Pricing Summary

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

**Total Monthly:** GHS

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## 6. Payment & Integrations

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

*Transaction fees charged by payment providers apply.*

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## 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

*Your business, all in one place.*