This form helps us build a complete picture of your business before we begin. The more detail you share, the more precisely we can design your system. All information is strictly confidential.

SECTION 1
BUSINESS OVERVIEW

Who are we working with?

1. Business Name

2. Primary Decision Maker — Name & Role

3. Best Contact Email

4. Best Contact Phone

5. What are your top 3 business goals for the next 3–6 months?

- [ ] Increase reservations / bookings
- [ ] Increase event attendance
- [ ] Increase average customer spend
- [ ] Increase repeat customers
- [ ] Improve online visibility
- [ ] Launch new offer or service

Other: _____

6. What is your biggest current growth challenge?

SECTION 2
CAPACITY & REVENUE

Understanding your business size

1. What is your maximum daily capacity? (tables, sessions, clients, etc.)

2. On average, how many bookings/reservations do you currently get per week?

3. What is your average transaction value per customer?

4. What is your slowest day of the week?

5. What is your strongest revenue day of the week?

6. Do you know your customer lifetime value? (Estimate if unsure)

SECTION 3

LEAD FLOW & CONVERSION

Where customers come from — and where they drop off

1. Where do most new customers currently come from?

☐ Instagram   ☐ Word of mouth

☐ Google search   ☐ Paid ads

☐ Walk-ins   ☐ Other: _____

2. Approximately how many inquiries (DMs, calls, messages) do you receive weekly?

3. What are the top 5 questions customers ask before booking?

Question 1

Question 2

Question 3

Question 4

Question 5

4. How do customers currently book or reserve?

☐ Phone ☐ Website form

☐ Instagram DM ☐ WhatsApp

☐ Third-party platform ☐ Other: _____

5. Do you track your inquiry-to-booking conversion rate?

☐ Yes — it is: _____ ☐ No

6. Where do you feel most potential customers drop off?

☐ Inquiry → Booking ☐ Booking → Showing up

☐ First visit → Returning ☐ After event

SECTION 4

RETENTION & REPEAT BUSINESS *Turning one-time visitors into loyal customers*

1. Do you currently collect customer emails?

☐ Yes — approx. how many contacts: _____ ☐ No

2. Do you collect customer phone numbers for marketing?

☐ Yes ☐ No

3. Do you currently run any loyalty or return incentive system?

☐ Yes — describe below ☐ No

_____

4. What percentage of customers return within 30 days? (Estimate if unsure)

_____

5. Would you be open to offering a VIP incentive?

☐ Discount ☐ Free item

☐ Early access ☐ Exclusive events

Other: _____

SECTION 5

EVENTS & PROMOTIONS *If applicable*

1. Do you host recurring events or promotional nights?

☐ Yes   ☐ No

2. What events are planned in the next 60 days?

_____

_____

3. What is your average attendance goal per event?

_____

4. What is your break-even number per event?

_____

5. What has been your most successful promotion in the past year?

_____

6. What has underperformed?

_____

AUTOMATION & EFFICIENCY   _Where we find time and money back_

1. Which repetitive tasks take the most time weekly?

_____

_____

2. Which of the following would reduce your workload immediately?

☐ Automated DM replies   ☐ Automated booking confirmations

☐ Event reminder system   ☐ Email follow-up system

☐ Review response automation   ☐ Customer re-engagement campaigns

3. Are you currently running paid ads?

☐ Yes — monthly budget: $ _____   ☐ No

Client Signature   **Date**

_____   _____

Printed Name

_____

Thank you for taking the time to complete this form. We review every answer carefully to design a system built specifically for your business.