ClearSkai
TECHNOLOGIES

SALES FIELD · DISCOVERY

Discovery Form

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

SL-SF-01 · Version 6.0 · Issued November 20, 2026

Document	
Document ID	SL-SF-01
Version	6.0
Issued	November 20, 2026
Library folder	Sales Field
Replaces	ClearSkai_Discovery_Form_v5-2.pdf
Classification	Sales document library · client form

Prepared for

CLIENT NAME & COMPANY

PROJECT / BUILD NAME

CLIENT EMAIL

Get back to building where it matters most.

DISCOVERY

Business Basics & Market

Use during the first serious sales call or onboarding discovery.

COMPANY

CONTACT

PHONE

EMAIL

TRADE / SERVICES

YEARS IN BUSINESS

SERVICE AREA

IDEAL CUSTOMER

CURRENT WEBSITE

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