Before you market, understand the business.

A discovery worksheet for construction owners. Use it in a planning meeting, a new agency conversation, or your own weekly review.

How to use: Bring the owner, the person who answers inquiries, and the person responsible for estimates or delivery. Write the real answer - including "we do not know yet."

The work

Prompt	Notes / decisions
Which services do we want more of?	_____ _____
Which services or projects should we avoid?	_____ _____
What makes a project a good fit?	Scope: _____ Area: _____ Timing: _____ Capacity: _____
What do buyers misunderstand?	_____ _____
What actually changes the estimate?	_____ _____

The customer

Who decides, who gathers information, and who else influences the choice? What event causes the buyer to start looking? What must they believe before a conversation?

_____
_____

Map what happens after someone reaches out.

Follow a real recent inquiry. Describe the process that actually happened before discussing the ideal one.

Step	What happens today?
Where did the inquiry come from?	Source / service / location: _____
Who saw it first?	Owner: _____ Backup: _____
What details were collected?	_____
How was the next action recorded?	System: _____ Next date: _____
What did the buyer hear next?	_____
Where did the process slow down?	_____
How was the outcome recorded?	_____

The evidence you can actually show

• A recent project with clear scope, real images, and permission to identify it.

• A customer review relevant to the decision your next buyer is making.

• The exact source, period, and definition behind any result you want to publish.

• A before-and-after example of a process, page, or handoff that improved.

The capacity conversation

If inquiries doubled next week, what would break first? Who handles calls, site visits, estimating, scheduling, and job handoff? Which improvements would help today even without more traffic?

_____

_____

Leave with a decision, not a pile of ideas.

A useful discovery conversation creates a clear next action and makes the tradeoffs visible.

Choose the first bottleneck

Our first problem to solve: _____
_____

Why it matters to the owner and customer: _____
_____

What a useful improvement looks like: _____
_____

Define a small first scope

Decision	Your answer
One change to make first	_____
Person accountable	_____
Information or access needed	_____
What we will measure	_____
Baseline and comparison period	_____
Review date and next decision	_____

Before agreeing to work: Make sure everyone understands scope, responsibilities, ownership of accounts/assets, ongoing support, and how either side can raise an issue. Keep private commercial terms in the actual agreement.

Use this worksheet to guide a conversation. It is not a specification, contract, forecast, or promise of results.