



## Discovery Workbook

I'm thrilled we're working together to create your website copy. (This is going to be fun.) Plan to set aside about 60-90 minutes to fill out this questionnaire. Yes, some of these questions are meant to be challenging.

Your responses are due at least 24 hours before our intake session, and will allow us to maximize our time together.

YOUR NAME:

WEBSITE:

EMAIL:

PHONE:

ADDRESS:

BIRTHDAY:

### YOU

Share your current "about" page. (URLs and/or text are welcome.)



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What do you want people that view this page to know, feel, and do?

What qualifies you to do what you do? (Don't be shy here. What's your street cred?)

Have you won any awards or honors? Have you received any special recognition from a third party?



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How do you think you're currently perceived? How would you like to be perceived going forward?

What is your approach to the work you do? What is your philosophy on why your work matters?

Where did you grow up and why aren't you there now?

What is something that not many people know about you?



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Where can we find you when you're not working? What's your favorite way to spend a weekend?

What are you passionate about personally? What do you really enjoy? What can't you stop talking about?

What are some of your favorite colors, music groups, magazines, decades, fashion influences, foods, celebrities, and travel destinations? Give me all the different flavors of you.

What is something you're proud of that you'd never put on your resume?



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How would your best friend describe you?

What do you want people to know about you (that you haven't shared publicly before)?

What would you like to stop doing?

Do you think about your legacy? How do you want to be remembered?



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## YOUR PEOPLE

Who is your ideal client? Describe them in detail.

What is their mindset? (Describe their attitudes, values, habits, and activities.)

What are their biggest concerns and fears? What keeps them up at night?

What do you do for your clients? What problem do you solve?



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When do clients want (and need) what you offer?

How do you make your clients *feel*?

Who have you worked with in the past? And what have you done for them? (Include your client list and case studies here, if you have them.)



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How have you been connecting with clients? How do your clients find you? Are you happy with the current process, or would you like to see a change (and if so, how would you like clients to find you instead)?

Have you worked with clients recently who were *not* a good fit? If so, describe the client and why it wasn't a good match.

Fill in the blank. I want to work with more \_\_\_\_\_  
and I don't want to work with \_\_\_\_\_.





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### YOUR OFFERINGS

How can your clients work with you? (List and describe each of your services / offerings, including prices. Include future/desired services, if they're not reflected elsewhere.)

Why would a client choose to work with you instead of your competitors?

What are the features and benefits of your services? (Features are factual descriptions, while benefits are the results and the problem that your service solves.)



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What is the typical "path" that your clients take to work with you? (For example: newsletter subscriber > workshop > consulting session OR follow on social media > request quote > start project.)

Do you have a specific offer to give people who are considering working with you? (For example, a free consultation call or free e-book.)

What do clients tell you about your offerings? What do they say over and over again about your work?

What's the one problem you are best at solving for your clients?



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What do your ideal clients say about you? List any testimonials or feedback you've received. (URLs to your testimonials page are welcome.)

What words come to mind when you think of the value you provide to your clients?

What image would you like your business to project? List a minimum of 5 feelings or thoughts you'd like to evoke for your clients.



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Why would someone *not* want your service?

What are some misconceptions about your service?

Do you offer a guarantee?

What else would you like to share with me?