



FREELANCE  
**ON FIRE**



CLIENT  
**DISCOVERY CALL**  
**WORKBOOK**

FOR GRAPHIC & WEB DESIGNERS  
& CREATIVE PROFESSIONALS



# Discovery Call Workbook

**COMPANY:**

**PRIMARY CONTACT:**

**PHONE:**

**EMAIL:**

Social Media Handles and Audience/Follower Counts:

Target Demographic/Ideal Customer Avatar:

Initial Reason for the Discovery Call:

Services the client thinks they need:

Services I think they might need:



# Discovery Call Workbook

## CLIENT LISTENING WORKSHEET

### Words and Phrases the Client is Using:

### Possible solutions:

What are your goals/objectives?

What do you want to achieve?

What do you see as your primary obstacles?

What has kept you from moving forward?

Do you have a current solution? Is it working?

Why or why not?

What happens if nothing changes?

What is your biggest motivation for this project?



# Discovery Call Workbook

## SERVICE AND ACTION STEPS

Top 3 Items to Address First:

Top Services They Are Interested In:

Additional Skills/Services I Offer That Might Help:

My Next Steps/Action Items:

Client's Next Steps/Action Items:



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## PROJECT VITALS

Timeframe. When does this need to be completed?

What is the budget for the project?

What is the estimated net result of this project? (money saved, money earned, exposure generated)

Decision Making: Does the project contact make final decisions? If not, what is the approval process?