DISCOVERY

Your AI Assistant Discovery Questionnaire

Before we design anything, I want to understand how your business actually runs day to day: where the time goes, what slows you down, and what keeps slipping through the cracks. Your answers here will shape what we build.

NAME _____ BUSINESS _____ DATE _____

How to use this

- There are no wrong answers. Rough notes and bullet points are perfect.
- Skip anything that doesn't apply. Add anything I haven't asked about.
- Specific, real examples help most. "Last Tuesday I spent an hour chasing three quotes" tells me more than "follow-ups take time".
- Don't think about what's technically possible yet. That's my job.

01 About you and the business

The basics, so the assistant understands the world it's working in.

1 What does your business do, in a sentence or two?

2 Who are your customers, and how do they usually find you?

3 Roughly how many clients, jobs or orders do you handle in a typical week or month?

4 Who works in the business: just you, or a team? What does each person do?

02 A typical day

Walk me through a normal working day. The small, "that's just how it is" details are often the most useful.

5 **What's the first thing you do when you start work?**

Check email? WhatsApp? A to-do list?

6 **What usually fills the bulk of your day?**

7 **What are you still doing at the end of the day that you wish you weren't?**

8 **Do you work mostly at a desk, on your phone, on the road, or a mix?**

03 Repetitive work

The jobs you do over and over are usually the first candidates for automation.

9 **What tasks do you do 10 or more times a week?**

Quotes, follow-ups, booking, answering the same questions, data capture...

10 **Where do you find yourself copying information from one place to another?**

e.g. from an email into a spreadsheet, or from WhatsApp into your calendar

11 **What questions do customers or staff ask you again and again?**

04 Things that fall through the cracks

This is usually where the real money is.

12 What gets forgotten or delayed when you're busy?

Follow-ups, invoices, callbacks, reminders, admin...

13 Have you lost a sale, a client or money because something was missed? What happened?

14 What do you keep in your head that nobody else could find if you were away for a week?

05 Bottlenecks and frustrations

Be honest. Nothing here is too small or too petty to mention.

15 What slows you down most in a normal week?

16 Where are you waiting on other people before work can move forward?

17 What part of running the business do you enjoy least?

18 If you got 5 extra hours a week back, what would you spend them on?

06 Tools and information

This tells me what an assistant would need to connect to, which is a big driver of cost and complexity.

19 **Which tools and apps do you use day to day?**

Email (Gmail/Outlook), WhatsApp, calendar, accounting (Xero, Sage, QuickBooks), spreadsheets, CRM, booking system...

20 **Where does your important business information live?**

Customer details, pricing, job history, documents

21 **Is there any tool you pay for but barely use, or one you hate using?**

07 How you'd like to work with an assistant

22 **How would you prefer to interact with it?**

Typing, voice notes, a phone app, a desktop screen, WhatsApp-style chat, or a mix

23 **Should it only help you, or also your staff? Or even your customers (e.g. a chat on your website)?**

24 **Should it act on its own (send a reminder, log a task), or always ask you first?**

25 **How would you like it to keep you informed?**

e.g. a morning summary, push notifications, a weekly report

08 Privacy and comfort level

26 **Will it handle personal information about your clients or staff? What kind?**

Relevant for POPIA compliance

27 Is there anything it must never see, touch or send?

09 The wishlist

Dream a little. We'll work out what's practical together.

28 If one thing in your business just happened automatically tomorrow, what would it be?

29 What would make you say "this was worth every cent" six months from now?

30 Pick your top three priorities from everything above.

1. 2. 3.

31 Anything else you think I should know?

What happens next

Once I have your answers, we'll sit down and go through them together. From there I'll map out where an assistant can make the biggest difference, what it would need to connect to, and a clear scope and quote for building it.

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