

Intake forms

Eleven forms and a call script. Each one says which files it fills. Print or save as PDF.

Intake forms

Eleven forms and a call script. Together they produce every answer the knowledge base needs.

Each form declares which files it fills. That mapping is the quality gate in both directions: no question gets asked that has nowhere to live, and no file ends up with no question behind it.

PDF versions for sending or printing are in pdf/.

Two kinds of question

Form 00 is research. You answer most of it yourself, from outside, before you speak to anyone again. What exists, what state it is in, who controls it.

Forms 01 to 10 are conversation. These are things only someone inside the business knows. Some arrive in the discovery call, some come back as filled forms, most are a mix.

The mapping

Form	Fills
00 source inventory	No single file. Produces the harvest list and feeds <code>marketing/channels.md</code> , <code>marketing/reviews-and-reputation.md</code> , <code>operations/tools-and-systems.md</code>
01 business basics	<code>company/identity.md</code> , <code>company/people-and-roles.md</code>
02 what we sell	<code>company/offering.md</code> , <code>company/pricing.md</code> , <code>sales/quoting.md</code>
03 who buys	<code>company/customers.md</code> , <code>sales/how-inquiries-arrive.md</code> , <code>sales/objections.md</code> , <code>sales/follow-up.md</code> , <code>service/common-questions.md</code>
04 how the work gets done	all four files in <code>delivery/</code>
05 money and terms	<code>operations/money.md</code>
06 suppliers and equipment	<code>operations/suppliers-and-vendors.md</code> , <code>operations/equipment-and-assets.md</code> , <code>operations/tools-and-systems.md</code>
07 licences, insurance, safety	<code>operations/compliance-and-safety.md</code>
08 voice and vocabulary	<code>company/voice.md</code> , <code>_system/glossary.md</code>
09 marketing and reputation	all three files in <code>marketing/</code>
10 when it goes wrong	<code>service/complaints-and-callbacks.md</code>
discovery call script	Spoken version of 01, 02, 03, 04 and 08

Who fills which

Do not send all eleven to one person. You will get one document back, late, half filled, in a single voice.

Form	Best answered by
00	You, alone, before asking anything
01, 02, 03	The owner or whoever runs the business day to day
04	Whoever actually does the work, not whoever sells it
05	Whoever does the books
06	Whoever orders materials and runs the equipment
07	Whoever owns safety and licensing, which is often not the owner
08	Whoever has been there longest
09, 10	The owner, or whoever handles {{CUSTOMER_WORD}}s

Form 04 answered by the salesperson instead of the person doing the work is the most common mistake, and it produces a description of how the work is supposed to go rather than how it goes.

The order

1. **00 first**, alone. It tells you what exists and what to ask for.
2. **The discovery call**, using the script. Record it.
3. **Send 01 to 10** to the right people, with a return date.
4. **Normalize** into the knowledge base using the mapping above.

Full sequence in the build checklist.

Rules

Record "does not exist" rather than leaving a field blank. A blank looks like an oversight and gets skipped. "No website" is a finding and gets acted on.

Never guess to fill a gap. Mark it "do not know yet." A guess becomes a fact nobody rechecks.

Capture the words people use, not a tidied version. The exact phrasing is the point, especially in forms 03, 08 and 10.

Do not put passwords, account numbers or card details on any of these. Record where a credential is held and who holds it, never the credential itself.

Form 00: source inventory

Answered by: you, alone, before speaking to them again **Time:** 45 to 90 minutes **Fills:** the harvest list, plus `marketing/channels.md` , `marketing/reviews-and-reputation.md` , `operations/tools-and-systems.md`

This is a scavenger hunt, not a questionnaire. Most of it you can answer from outside. Do that first, then confirm the rest with them.

Mark every line one of three ways: **exists**, **does not exist**, or **do not know yet**. Never leave one blank and never guess. "Does not exist" is a finding worth as much as a URL.

Business: {{BUSINESS_NAME}} · Researched by: _____ · Date: _____

Website

Finding
Does a website exist
Address
What it is built on
Roughly when it was last updated
Is it secure, does it load, does it work on a phone
Who can make changes
Where the domain is registered, and who controls it
Where it is hosted
Is analytics installed
Honest condition in one line

Maps and local listings

Finding
Google Business Profile exists
Claimed or unclaimed
Review count and average
Date of most recent review
Has anyone replied to any review
Photos, how many and how recent
Hours correct
Apple Maps, Bing Places
Name, address and phone consistent everywhere

Reviews beyond Google

Check the platforms that matter in this trade specifically, not just the general ones.

Platform	Exists	Count	Average	Last one

What do the negative reviews have in common:

Social accounts

Platform	Exists	Handle	Last post	Followers
Facebook				
Instagram				
LinkedIn				
YouTube				
TikTok				
Other				

Any account abandoned but still visible:

Directories, associations and registers

Trade associations, chambers, licensing registers, sector directories, marketplaces, co-ops.

Where	Listed	State of the listing

Systems they run on

Ask about these; you cannot see them from outside.

Finding
Scheduling or job management
Quoting and invoicing
Accounting
{{CUSTOMER_WORD}} records
Payments
Email platform
Phone and messaging
File storage
Anything industry specific
Email list, and roughly how big

For each, note who holds the login. Logins held by a former employee or a lapsed agency are common and nobody finds out at a good moment.

Documents they already have

	Exists	Where	Condition
Price list			
Written procedures			
Safety documentation			
Employee handbook			
Standard contract or terms			
Warranty terms			
Licences and certificates			
Insurance certificates			
Product or service catalogue			
Previous marketing material			
Brand or logo files, originals			

Images and video

	Finding
Photos of the work, how many and how good	
Photos of the team or premises	
Video of any kind	
Who owns the rights	
Where they are kept	

Data we could get access to

Available
Website analytics
Search console
Advertising accounts
{{CUSTOMER_WORD}} list export
Sales history
Enquiry records

Recordings

Finding
Was the first call recorded
Is it transcribed
Any other recorded calls or meetings
Do they record calls as a matter of course

The gap list

The most valuable output of this form. Everything that does not exist, is broken, abandoned, or controlled by the wrong person.

1. 2. 3. 4. 5.

What to ask for

Specific things to request, and who to request each from.

1. 2. 3. 4. 5.

Form 01: business basics

Best answered by: the owner, or whoever runs it day to day **Time:** 20 minutes **Fills:** `company/identity.md`, `company/people-and-roles.md`

Answer in your own words. Short is fine. Sounding professional is not the goal here, and polished answers are usually less useful than blunt ones.

Completed by: _____ · Date: _____

The basics

Legal name:

Name you trade under:

Year you started:

Where you are based:

How far you travel for work:

How the business is structured:

Website, or "none":

In one sentence

What does the business do? Say it the way you would to a stranger at a counter, not the way it would appear on a website.

How it started

Why does this business exist? What were you doing before?

What makes you different

What can you do, or do better, than the others around you? Be specific. If the honest answer is "nothing much, we just do it properly," that is a real answer and more useful than most.

What you are not

What do people assume you do that you do not? What work do you turn down?

What you are proud of

The thing you would mention without being asked.

Where it is heading

Growing, holding steady, changing direction, winding down toward a sale or handover? Be honest. Nobody outside sees this and it changes what advice is worth giving.

The people

How many people, and what is the split between full time, part time and seasonal?

List every role and what it covers. Roles, not names.

Role	Responsible for	Can decide on their own

Who can approve a discount, authorize spending, or turn down a job? Include the limits.

Who deals with {{CUSTOMER_WORD}}s, and who does not?

Outside help you rely on. Accountant, bookkeeper, subcontractors, seasonal workers, whoever does the website.

Who	What they do	How often

What can only one person do? Every business has something. What breaks if they are away for a month?

Does the headcount change through the year? When, and by how much?

Form 02: what we sell and what it costs

Best answered by: the owner, or whoever sets prices **Time:** 30 minutes **Fills:** `company/offering.md` , `company/pricing.md` , `sales/quoting.md`

Prices go out of date. Put the date on this form and it stays useful.

Completed by: _____ · Date: _____

What you sell

What is the main thing, and roughly what share of the money does it bring in?

Everything you offer:

What it is	Who it is for	Sold by the...	Rough share of revenue

"Sold by the" means the unit: hour, `{{THE_WORK}}`, item, month, acre, head, seat, visit.

What you will not do

Work you turn down, and the reason for each. Too small, too far, wrong equipment, went badly last time, needs a licence you do not hold.

What people ask for that you do not offer

And where you send them, if anywhere.

Seasonal or conditional

Anything only available at certain times, or dependent on weather, supply or licensing.

Capacity

How much can you genuinely take on at once? What is the limit: people, equipment, materials, or space?

Pricing

Prices as at: _____

How do you price? Hourly, fixed, per unit, cost plus a margin, market rate, subscription, a mix?

Why that way rather than another?

The actual numbers:

What	Price	Per	Notes

If nothing is fixed, what drives the number, and what is a realistic range?

Minimum charge, call out fee, or minimum order:

What makes a price go up? Distance, urgency, access, out of hours, difficult site, small quantity.

Do you discount? What for, and what will you never discount?

When did prices last change, by how much, and how did it go?

Honestly, do you think you are priced right? Where do you suspect you are leaving money behind? Nobody outside sees this answer.

Quoting

What do you actually send: a verbal number, a written quote, a formal proposal, or a checkout?

Walk through the steps from first contact to agreed work.

1. 2. 3. 4. 5.

How long from enquiry to a quote in their hands?

How long does a quote stay valid?

What has to happen before you can quote? Site visit, measurements, photos, specifications.

What is in a quote? What is explicitly excluded? Exclusions matter most, because nearly every dispute traces back to something nobody wrote down.

Roughly what share of quotes turn into work?

Form 03: who buys and what they ask

Best answered by: the owner, or whoever talks to {{CUSTOMER_WORD}}s most **Time:** 30 minutes **Fills:**

company/customers.md , sales/how-inquiries-arrive.md , sales/objections.md , sales/follow-up.md , service/common-questions.md

Write what people actually say, in their words. Do not tidy it into business language. The exact phrasing is what makes these answers usable.

Completed by: _____ · Date: _____

Who they are

Describe your typical {{CUSTOMER_WORD}}. Real description, not a demographic bracket.

Do you have distinct types? Most businesses have two or three that behave differently.

Type 1

Who they are: What they care about most: What they worry about: How they find you: Typical value:

Type 2

Who they are: What they care about most: What they worry about: How they find you: Typical value:

Type 3

Who they are: What they care about most: What they worry about: How they find you: Typical value:

Your best {{CUSTOMER_WORD}}

Not the biggest. The one you would take ten more of. What makes them good?

Your worst

The kind that costs more than they pay, in money or patience. What is the early warning sign?

Why do they choose you?

What do they actually say? If you do not know, say so. It is the best question to ask the next five people who buy.

Why do they leave?

How they reach you

How they get in touch	Rough share	Who handles it	How fast you reply

What do you need to know before you can usefully respond?

What are the first two or three questions you ask?

What do you not respond to at all, and how do you tell?

Where do enquiries get lost? Voicemail nobody checks, a form going to an old address, a platform nobody logs into.

What they push back on

Write the objection in their words, then what they are really asking underneath it.

They say: " What they really mean: How you answer: Does it work:

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They say: " What they really mean: How you answer: Does it work:

Following up

After you send a quote and hear nothing, what do you do? "Nothing" is a common and honest answer.

After a {{THE_WORK}} is finished, does anyone check in? When, and what do you ask?

Do you contact people who used you once and never came back?

At what point do you stop chasing?

Where does a pending quote live so it is not forgotten?

Questions you get constantly

Write them the way people ask them.

Before they buy:

1. "
2. "
3. "
4. "
5. "

While the work is happening:

1. "
2. "

After it is finished:

1. "
2. "

The awkward ones

Questions you would rather not be asked, and your honest answer.

Form 04: how the work gets done

Best answered by: whoever actually does the work, not whoever sells it **Time:** 45 minutes **Fills:** all four files in delivery/

This is the most important form here and the one most often given to the wrong person. A salesperson describes how the work is supposed to go. Someone doing it describes how it goes.

Describe what really happens, including the informal parts and the shortcuts. Nobody outside the business reads this.

Completed by: _____ · Role: _____ · Date: _____

Start to finish

Walk through a {{THE_WORK}} from the moment it is agreed to the moment it is finished and paid. Add or remove steps as needed.

1. 2. 3. 4. 5. 6. 7.

How long does a typical one take? And a bad one?

What sets the pace: your time, materials, weather, a third party, or the {{CUSTOMER_WORD}}?

Which role handles which step?

Before you can start

What has to be true? Access, deposit, materials, permit, weather, a signed agreement.

What happens when you start anyway without one of those?

Where it goes wrong

Which steps slip most often, and why? Be blunt.

What do you do when they do? Who gets told, how fast, and who decides?

Different kinds of work

Does a small one follow a different path from a large one? Describe both.

What gets skipped on a rush or emergency job, and what does that cost you?

What you hand over

What does the {{CUSTOMER_WORD}} end up with? Include paperwork, certificates, warranties and instructions.

What good looks like

What separates acceptable work from good work in your trade? Be concrete. Give numbers if there are numbers.

What gets checked, when, and by whom?

Check	When	Who	What passing means

What outside standards do you work to? Codes, regulations, manufacturer specifications, certification schemes. Include the year or version.

What would you never sign off, whatever the pressure to get finished?

Who decides a {{THE_WORK}} is done? Is the {{CUSTOMER_WORD}} part of that?

What happens when work does not meet the standard and it is found late?

Do you count anything? Callbacks, rework, complaints, inspection results.

Scheduling

How is work scheduled? Name the actual system, including the informal one people really use.

How far ahead are you booked? How much does that move through the year?

Busiest period, quietest period, and what drives each?

What breaks when you are at your busiest?

Do you take emergency work? What does it cost, and what gets displaced?

Who can commit to a date? Who can move one?

What causes delay most often?

How much notice does a {{CUSTOMER_WORD}} get when a date moves?

Finishing

What exactly does "finished" mean?

Does someone walk the {{CUSTOMER_WORD}} through the completed work? If not, why not?

What state do you leave the site in?

When does the final invoice go out?

What is the warranty or guarantee, and what voids it?

What do you record about a finished {{THE_WORK}}, where, and for how long? Photos, measurements, serial numbers, what was actually installed.

Form 05: money and terms

Best answered by: whoever does the books **Time:** 25 minutes **Fills:** `operations/money.md`

Do not write account numbers, card details or banking passwords on this form. Where a credential is held and who holds it is enough.

Completed by: _____ · Date: _____

Getting paid

How can people pay you? Which do you prefer, and which would you rather stop accepting?

What are your terms? Deposit, staged payments, on completion, net 30?

Do terms differ by {{CUSTOMER_WORD}} type or job size?

Invoicing

Who raises invoices?

How long after the work finishes does the invoice go out? Be honest.

What goes on an invoice?

When people do not pay

What is the chase sequence, and who does it?

At what point do you stop working for someone who owes you?

At what point does it go further, and to whom?

Roughly how much is outstanding at any given time? How old is the oldest?

As at: _____

Costs

Main costs in rough order of size:

1. 2. 3. 4. 5.

What has to be paid whether or not any work happens? Roughly how much a month?

Cash through the year

Which months are tight and which are comfortable? What causes it?

Anything you have to pay for well before you get paid?

What good looks like

What does a good month look like? Revenue, number of {{THE_WORK}}s, or whatever you actually watch.

What does a bad one look like, and how early can you tell?

Who handles it

Bookkeeper: Accountant: Who reconciles the bank: Who can authorize payments, and up to what:

Records

Which system holds the financial records? Who has access? How far back does it go?

Anything worrying you

Nobody outside sees this. Cash, a debt, a {{CUSTOMER_WORD}} who owes too much, an increase you have been putting off.

Form 06: suppliers, equipment and systems

Best answered by: whoever orders materials and runs the equipment **Time:** 30 minutes **Fills:**

operations/suppliers-and-vendors.md , operations/equipment-and-assets.md ,
operations/tools-and-systems.md

If the business owns almost nothing, say so and skip to the systems section. That is a real answer.

Completed by: _____ · Date: _____

Who you buy from

Supplier	What you get from them	Terms	What happens if they stop tomorrow

Anything you can only get from one place? What would you do?

How long do things take to arrive? What is unpredictable?

Who orders, who approves, and is there a spending limit?

How often do your costs move, and how much notice do you get?

Does that flow through to your prices, or do you absorb it?

Subcontractors and partners

Who	What they do	When you use them	Terms

Do you check their insurance and licensing? When last?

Who you sell through

Co-ops, distributors, marketplaces, agents, wholesalers. Anyone between you and the end buyer, and what they take.

Equipment

What	Age	Condition	Needs servicing or calibration	Replace when

Vehicles: what, how many, what for. Anything needing a particular licence to drive?

Premises: owned or leased, what it is, and any constraint it puts on the work. Lease end date if leased.

Stock and materials: what is held, roughly how much, and how it is tracked. Anything perishable or dated?

What piece of equipment limits what work you can take on?

What gets serviced, how often, and who tracks it?

If something critical failed tomorrow: hire, borrow, subcontract, or stop?

Systems

What do you use for each of these? Write "nothing" or "paper" where that is the answer.

For	What you use	Who holds the login	Rough cost
Scheduling			
Quoting and invoicing			
Accounting			
{{CUSTOMER_WORD}} records			
Payments			
Email			
Phone and messaging			
File storage			
Website			
Anything industry specific			

Which of these pass information to each other automatically?

Where does someone type the same thing twice?

What do you pay for and not use?

What gets backed up, where, and when was that last checked?

Who do you call when something breaks?

Form 07: licences, insurance and safety

Best answered by: whoever actually owns this, which is often not the owner **Time:** 25 minutes **Fills:** `operations/compliance-and-safety.md`

If none of this applies to your trade, write one line saying so and return the form. That is useful information and takes thirty seconds.

Record where a document is kept, not the number on it.

Completed by: _____ · Date: _____

Licences and registrations

What	Where the document is kept	Renewal date	Who is responsible

The renewal dates are the point of this table.

Certifications and qualifications

Held by the business:

Held by individuals:

Which work legally requires which qualification, and who currently holds it?

Insurance

Cover	Where the certificate is kept	Limit	Renewal date

Anything you suspect you are underinsured for?

Rules you work under

What governs your trade? Health and safety, environmental, food safety, animal welfare, data protection, building codes, transport, professional standards.

Inspections

Who inspects you, how often, and what do they look at?

How did the last one go? Anything outstanding from it?

Safety

What are the actual safety practices? Protective equipment, procedures, training, first aid.

How are incidents reported and recorded?

What training is required, who has it, and when does it expire?

What you will not do

Work refused on safety grounds. Who has the authority to refuse? It should be everyone.

Records you have to keep

What must be retained, for how long, and where? Training, inspections, incidents, certificates, disposal, traceability.

Anyone working under you

What do you require of subcontractors? When was it last verified?

Anything overdue

Expired items, gaps you know about, things you have been meaning to sort. Better written down than remembered.

Form 08: voice and vocabulary

Best answered by: whoever has been there longest **Time:** 25 minutes **Fills:** `company/voice.md` , `_system/glossary.md`

The vocabulary half of this form is the highest value thing in the whole pack. An AI that does not know your words writes brochure language, and everyone who does the work can tell instantly.

Completed by: _____ · Date: _____

Your words

What do you call the people who pay you? Customer, client, patient, member, buyer, guest, something else?

What do you never call them?

What do you call one unit of your work? Job, project, order, appointment, run, batch, season?

What do you never call it?

Trade terms

Words specific to your work that an outsider would not know. Do not stop at five. Twenty is normal.

Word	What it means	Anything worth knowing about it

Words that mean something different to you

Ordinary words that mean something specific in your trade. These cause the most confusion because nobody thinks to ask.

Word	What an outsider assumes	What it means to you

Abbreviations and units

Short	Full	Notes

Names that get mangled

Suppliers, products, places, standards. Anything autocorrect or transcription gets wrong.

Correct	Usually mistyped as

How you sound

Describe how the business should sound in one sentence.

Where do you sit? Mark each line.

Formal _____ Casual

Serious _____ Light

Technical _____ Plain

Brief _____ Thorough

Confident _____ Modest

Words that make you wince

Words you never want to see written about your business. Every business has some.

What do you say instead?

Instead of	You say

Something that sounded right

Paste a real paragraph you were happy with. An email, a quote, a sign in the window. Anything.

Something that did not

Paste something that made you uncomfortable, and say what was wrong with it.

Different audiences

Do you talk differently to a long standing {{CUSTOMER_WORD}} than to a stranger asking a price? How?

Formatting

Anything you are particular about. How you write prices, how your own service names are capitalized, whether you use contractions, punctuation you dislike.

Form 09: marketing and reputation

Best answered by: the owner, or whoever handles marketing **Time:** 25 minutes **Fills:** all three files in marketing/

Form 00 already recorded what exists from the outside. This form is about intent: what you do on purpose, what you have tried, and what you think works.

Completed by: _____ · Date: _____

Where work actually comes from

Source	Rough share	Are they good {{CUSTOMER_WORD}}s	What it costs

Word of mouth, repeat business, search, maps, social, signage, vehicle livery, directories, trade associations, referral partners, advertising.

How do you know? Do you ask people, track it, or is this an estimate? An honest estimate is fine if it is labelled as one.

What you do to be found

Everything active, including informal things. Being in an association, sponsoring a team, turning up to a market, answering questions in a local group.

What you have tried that did not work

And why, if you know.

What you spend

Roughly, and on what. As at _____

Referrals

Who sends you work?

Do you thank them, or do anything for them? Is that systematic or does it just happen?

Where you think you are invisible

Places people look for a business like yours where you do not show up.

Reviews

Who asks for reviews, and when? "Nobody" is the most common answer.

What do the good reviews say? Use the words people actually use.

What do the bad ones say? Read them as data, not as attacks. Three people describing the same problem is a process fault.

Who replies to reviews, how quickly, and in what tone?

Reputation offline

What are you known for locally or in the trade? This is often stronger than anything online and almost never written down.

References

{{CUSTOMER_WORD}}s who would act as a reference or appear in a case study. What exactly did they agree to, and when did they agree to it?

Website and channels

Anything Form 00 could not answer from outside.

Who built the website, and can you change it yourself?

Who controls the domain and the hosting?

Do you have the original logo files?

Is there an email list? How big, and when was it last used?

Any account or listing you have lost access to?

What you would fix first

If one marketing thing could be fixed tomorrow, what would you pick?

Form 10: when it goes wrong

Best answered by: the owner, or whoever fields complaints **Time:** 20 minutes **Fills:** service/complaints-and-callbacks.md

The most useful form here for improving the business, and the one people are most tempted to answer diplomatically. Answer it honestly. Nobody outside sees it.

Completed by: _____ · Date: _____

What goes wrong most

What happens	How often	Usual cause	What you do about it

How you find out

How does a complaint reach you? Phone, email, in person, a review, or through someone else?

How long before it reaches somebody who can actually do something?

Who deals with it

Who responds?

Who can authorize putting it right, and up to what value without asking?

What you do

Walk through what happens from complaint to resolution.

1. 2. 3. 4.

How quickly do you aim to respond first?

What you will do to fix things

Redo the work, refund, partial credit, replace, something else?

Where is the limit? What will you not do?

Callbacks and warranty

What counts as covered, and what is chargeable?

Who decides?

Roughly how often do you go back to a finished {{THE_WORK}}?

What you changed

Anything you actually changed because of a complaint. This is the most valuable question on the form. If the answer is nothing, that is worth knowing too.

What still bothers you

Recurring problems you have not solved. Naming them is not failure.

The worst one

The complaint that stuck with you. What happened, what you did, and what you would do differently. Nobody outside sees this, and it is usually where the most useful lesson in the business is sitting.

Discovery call script

Time: 60 to 90 minutes **Covers:** the spoken version of forms 01, 02, 03, 04 and 08 **Before you start:** Form 00 filled in as far as you can get it alone

Do form 00 first. This call goes badly if you spend it asking things you could have found out yourself, and it goes well if you spend it confirming what you found.

Before the call

- Recording tool tested, not just opened
 - Form 00 filled in, with your gap list to hand
 - This script open, so you can follow rather than remember
 - Ninety minutes clear, and tell them it might take that long
-
-

Opening

Start recording before the conversation properly begins.

"Before we get into it, I record these so I can build your notes properly instead of scribbling while you talk. Is that alright?"

Wait for the answer. It is now captured in the same file as the conversation.

"This is going to be a lot of questions, and some of them will sound basic. That is deliberate. I would rather ask something obvious than assume it."

Then put the pen down. Do not take notes. The recording is taking notes. Your job is to notice.

1. The business itself

Form 01

- Tell me what the business does. Say it the way you would to someone at a counter.
 - How long have you been doing this?
 - What were you doing before?
 - Why did you start it?
 - How many people, and who does what?
 - Who can make decisions without asking you?
 - Is there anything only one person knows how to do?
-

2. What you sell

Form 02

- What do you sell? Start with whatever brings in the most money.
 - What else?
 - Which of those do you actually enjoy?
 - What do people ask for that you do not do?
 - What do you turn down, and why?
 - Does any of it depend on the season or the weather?
 - How much can you take on at once? What is the thing that limits it?
-

3. The work itself

Form 04. Slow down here. This is the richest part of the call.

- Walk me through a typical {{THE_WORK}}, from agreed to finished.
- How long does that take? And when it goes badly, how long?
- What has to be in place before you can start?
- What happens when you start without it?
- Where does it most often go wrong?

- What do you do when it does?
- What separates a good one from an acceptable one? Would somebody outside the trade notice?
- Who decides it is finished?
- What do you leave them with?

Ask "and then what happens" repeatedly. People compress the middle of a process without noticing, and the compressed part is usually where the real work lives.

4. Who buys

Form 03

- Describe a typical {{CUSTOMER_WORD}}.
 - Are there different types? How do they differ?
 - Who is your best one? Not biggest. Best.
 - Who do you regret taking on? What was the early sign you ignored?
 - Why do people choose you rather than someone else? What do they say?
 - Why do they leave?
 - How do they usually find you?
 - What do they push back on? Give me their words.
 - What do you say back? Does it work?
-

5. What people ask

Form 03

- What question do you answer over and over?
 - What do people always get wrong about you?
 - What do you get asked that you would rather not?
-

6. When it goes wrong

Form 10. Ask this once they are comfortable, not at the start.

- What goes wrong most often?
 - How do you find out?
 - What do you do about it?
 - Has a complaint ever changed how you work?
 - Is there one that still bothers you?
-

7. Words

Form 08. Ask this throughout, not only here.

Every time they use a word you do not know, stop and ask. Do not save it for the end.

- You said {{term}}. What does that mean exactly?
 - Is that what everyone in the trade calls it, or is that yours?
 - What do you call the people who pay you? Do you mind the other word?
 - Is there any word about your business that makes you wince?
-

8. Confirming the research

Form 00. Confirm rather than ask.

Go through your gap list as statements.

- You have thirty four reviews across two sites and I could not find a reply to any of them. Is

that deliberate?

- Your Google listing has the old hours on it. Does anyone have access to it?
- The website was last updated in 2021 as far as I can tell. Who built it?

This part sounds different from every other conversation they have had with someone selling to them, and it is the part they remember.

9. Closing

- What have I not asked that I should have?

- If one thing about the business got fixed tomorrow, what would you pick?
- Who else should I be speaking to about any of this?

That last question is how you find out that the person who actually knows the work, the books, or the safety file is somebody else. It is usually the most useful ninety seconds of the call.

After

- Stop the recording and confirm the file saved
- Transcribe within 24 hours, while you can still repair garbled words from memory
- Read it once, marking anything that surprised you
- Pull the vocabulary out first, into `_system/glossary.md`
- Note who each remaining form should go to, based on what you just learned