

CLIENT DISCOVERY CALL - TechVentures Inc

Dec 21 2025

attendees

- Sarah Johnson (their CMO)
- Mike Chen (COO)
- me

PROBLEM

they have no standardized client onboarding. every consultant does it differently. losing deals in discovery phase because proposals are inconsistent. Sarah said "we look unprofessional"

budget

~50k for consulting engagement

maybe more if we can prove ROI

timeline

want to start Q1 2025

ideally have new process in place by march

what they need

- discovery call framework
- proposal templates
- contract templates
- onboarding checklist
- project mgmt guidelines

competitors

tried using generic templates from internet - didn't work

looked at hiring ops consultant - too expensive

current state: everyone wings it

decision makers

Sarah signs off (CMO)

John needs to approve (operations)

legal reviews contracts

red flags??

- mentioned budget is "flexible" but then said 50k max - which is it?
- timeline seems tight for march launch
- not sure if whole team is bought in

NEXT STEPS

- send proposal by friday
- include case study from similar client
- schedule followup call for next week
- get them to fill out intake form

questions I forgot to ask

- what's their current close rate?
- how many consultants on team?
- what CRM are they using?

notes

Sarah seems like champion but Mike was quiet - need to get him engaged

they mentioned referral from Jennifer at CloudCorp (our client from last year)