

# WAIMI Client Discovery Questionnaire

## Welcome to WAIMI!

Thank you for your interest in WAIMI's AI-powered business planning solutions. To help us understand your needs and provide the most valuable insights, please take a few minutes to complete this questionnaire.

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## Section 1: Company Information

1. Company Name:

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2. Your Name & Title:

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3. Industry/Sector:  Technology/Software  Healthcare  Finance/Banking  Retail/E-commerce  Manufacturing  Professional Services  Real Estate  Hospitality/Food Service  Education  Other:

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4. Company Stage:  Pre-launch/Startup (0-1 years)  Early Stage (1-3 years)  Growth Stage (3-5 years)  Established (5+ years)

5. Number of Employees:  1-5  6-20  21-50  51-100  100+

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## Section 2: Financial Overview

6. Current Annual Revenue:  Pre-revenue  \$0 - \$100K  \$100K - \$500K  \$500K - \$1M  \$1M - \$5M  \$5M - \$10M  \$10M+  Prefer not to disclose

7. Revenue Growth Rate (Year-over-Year):  Declining  Flat (0-5%)  Moderate Growth (5-20%)  Strong Growth (20-50%)  Rapid Growth (50%+)  Not applicable/New business

8. Current Profitability Status:  Not yet profitable  Break-even  Profitable (0-10% margin)  Profitable (10-20% margin)  Profitable (20%+ margin)

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## Section 3: Business Planning Needs

9. What is your primary goal for working with WAIMI? (Select all that apply)  Create a comprehensive business plan  Develop financial projections  Conduct market analysis  Create growth strategy  Prepare for fundraising/investment  Improve operational efficiency  Strategic planning and consulting  Other:

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10. Are you currently seeking funding or investment?  Yes, actively seeking  Planning to seek within 6 months  Planning to seek within 12 months  Not currently seeking funding  Already funded

11. If seeking funding, what type?  Angel Investment  Venture Capital  Bank Loan  SBA Loan  Private Equity  Crowdfunding  Other: \_\_\_\_\_

12. Target funding amount (if applicable):

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## Section 4: Current Challenges & Opportunities

13. What are your top 3 business challenges? (Rank 1-3, with 1 being most critical)

Challenge #1: \_\_\_\_\_

Challenge #2: \_\_\_\_\_

Challenge #3: \_\_\_\_\_

14. Where do you see the greatest opportunities for improvement in your business? (Select all that apply)

Revenue generation/Sales  Marketing and customer acquisition  Operational efficiency  Cost reduction

Product/Service development  Team building and talent  Technology and systems  Customer retention

Market expansion  Strategic partnerships  Financial management  Other: \_\_\_\_\_

\_\_\_\_\_

15. What specific areas would you like WAIMI to focus on? (Please describe)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Section 5: Market & Competition

16. How would you describe your competitive position?  Market leader  Strong competitor  Growing presence  New entrant  Niche player

17. What makes your business unique? (Your competitive advantage)

\_\_\_\_\_  
\_\_\_\_\_

18. Who are your primary competitors?

\_\_\_\_\_

19. What is your target market/customer profile?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Section 6: Strategic Vision

20. Where do you see your business in 3 years?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

21. What are your revenue goals for the next 3 years?

Year 1: \$ \_\_\_\_\_

Year 2: \$ \_\_\_\_\_

Year 3: \$ \_\_\_\_\_

22. Are you planning any major initiatives in the next 12 months? (Select all that apply)  New product/service launch  Market expansion  Hiring key personnel  Technology implementation  Facility expansion  Strategic partnerships  Acquisition/Merger  Fundraising  Other: \_\_\_\_\_

\_\_\_\_\_

## Section 7: WAIMI Services Interest

23. Which WAIMI services are you most interested in? (Select all that apply)

- Comprehensive Business Plan** (\$1,499 - \$9,999)
  - Executive summary, market analysis, financial projections, growth strategy
- Subscription Planning Service** (\$2,999 - \$7,999/month)
  - Ongoing strategic planning, regular updates, continuous consulting
- Financial Projections Package**
  - 3-5 year forecasts, cash flow analysis, break-even analysis
- Market Analysis & Research**
  - Industry analysis, competitive landscape, customer segmentation
- Growth Strategy Development**
  - Expansion planning, market entry strategy, scaling roadmap
- Operational Planning**
  - Process optimization, resource allocation, performance metrics
- Strategic Consulting**
  - Executive advisory, business model innovation, change management
- Enterprise Custom Solutions**
  - Custom pricing based on specific requirements

24. What is your timeline for getting started?  Immediately  Within 2 weeks  Within 1 month  Within 3 months  Just exploring options

25. What is your budget range for business planning services?  Under \$5,000  \$5,000 - \$10,000  \$10,000 - \$25,000  \$25,000 - \$50,000  \$50,000+  Need to discuss

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## Section 8: Additional Information

26. How did you hear about WAIMI?  Google Search  LinkedIn  Referral (please specify):  
\_\_\_\_\_  Social Media  Industry Event  Other:  
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27. Have you worked with business planning consultants before?  Yes  No

If yes, what was your experience? \_\_\_\_\_

28. Is there anything else you'd like us to know about your business or needs?

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## Section 9: Contact & Next Steps

29. Best way to contact you:  Email  Phone  Video Call  In-person meeting

30. Preferred contact information:

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

31. Best time to reach you:  Morning (9am-12pm)  Afternoon (12pm-5pm)  Evening (5pm-8pm)

32. Preferred days:  Monday-Friday  Weekends  Flexible

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## Thank You!

Thank you for taking the time to complete this questionnaire. A member of our team will review your responses and reach out to you within 24-48 hours to discuss how WAIMI can help transform your business planning.

**Questions?** Contact us at:

- Email: [Tony.Wolf@Tony-Wolf.com](mailto:Tony.Wolf@Tony-Wolf.com)
  - Phone: (352) 779-7833
  - Website: <https://waimi.xyz>
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**WAIMI - Transform Your Business with AI-Powered Planning**

*This questionnaire is confidential and will only be used to better understand your needs and provide tailored solutions.*