



DISCOVERY & ASSESSMENT

Please answer all questions truthfully and accurately in a Word document and return to the consultant.

SECTION 1: ORGANIZATIONAL INFORMATION

1. What is the name of the company or organization?
2. What is your desired industry or field of service?
3. What is your legal entity type (LLC, Nonprofit, Corporation, etc.)?
4. Is your entity currently registered and in good standing with the Secretary of State?
5. What is your business registration number or EIN?
6. What is your business address, email, and contact phone number?
7. Do you have a website or digital presence? (If yes, please provide a link.)

SECTION 2: GOVERNANCE AND MANAGEMENT

1. Who are the key officers, directors, or decision-makers within your organization?
2. How often does your leadership or board meet?
3. Do you currently have bylaws or a governing document?
4. Do you have paid staff, volunteers, or consultants? Please specify roles.
5. What internal systems do you use for bookkeeping, record-keeping, or data management?
6. Do you have an accountant, attorney, or compliance advisor currently supporting your operations?

SECTION 3: FINANCIAL AND OPERATIONAL CAPACITY

1. What is your current operating or start-up budget?
2. Do you currently have a business bank account?
3. Have you previously received grants, loans, or investor funding? If yes, please specify sources.
4. What is your credit score or organizational credit rating (if applicable)?
5. What financial systems or software do you use (e.g., QuickBooks, Excel, etc.)?
6. Do you have an annual budget or financial projection prepared?

SECTION 4: STRATEGIC PLANNING AND DEVELOPMENT GOALS

1. What are your short-term goals (next 6–12 months)?
2. What are your long-term goals (3–5 years)?
3. Have you created a business or strategic plan? If yes, please attach or summarize key points.
4. What are your top three challenges as an organization?
5. What key outcomes do you hope to achieve from working with “KP & Associates, Inc.”?
6. How will success be measured for this consulting engagement?

SECTION 5: INTELLECTUAL PROPERTY AND LEGAL CONSIDERATIONS

1. Do you currently own or have any registered trademarks, copyrights, or patents?
2. Have you developed any original materials, programs, or systems? If yes, please describe.
3. Are there any pending legal issues, disputes, or compliance concerns related to your organization?
4. Do you agree to maintain the confidentiality of “KP & Associates, Inc.” materials and proprietary information shared during consultation?

SECTION 6: CONSULTANT RELATIONSHIP AND EXPECTATIONS

1. What specific services or results do you expect from “KP & Associates, Inc.”?
2. Who will be your organization’s primary contact person for communication and approvals?
3. What is your preferred method of communication (email, phone, text messaging, meetings)?
4. What timeline do you expect for project completion or deliverables?
5. Are you prepared to commit to scheduled meetings, assignments, and review sessions?
6. Have you previously worked with a consultant? If yes, describe your experience.

ACKNOWLEDGMENT

I, the undersigned, certify that the above information is true and complete to the best of my knowledge. I understand that all information provided will be used solely for evaluation and consultation purposes.

Client Name: _____

Title/Position: _____

Signature: _____

Date: _____