Client Strategy & Goals Discovery Guide

A structured conversation guide for EA Analytics Consulting engagements. Use this to understand where a client is, where they want to go, and what it will take to get there.

1. Business snapshot

What does the business do, and how does it make money?

What tools and data sources are already in use (POS, CRM, spreadsheets, Excel, etc.)?

What's the single biggest pain point right now?

2. Goals & success metrics

Where do you want this business to be in 12 months?

What does success look like in numbers (revenue, cost, time, retention)?

What are the top 3 priorities for this year?

3. Constraints & resources

Budget and timeline expectations for this engagement:

Who's involved, and who makes the final call?

What's already been tried, and why didn't it stick?

4. Key challenges & risk

What is this problem currently costing in money, time, or missed opportunity?

What's the risk of doing nothing for another 6 to 12 months?

5. Prioritization: impact vs. effort

List the initiatives discussed, then rate each so the highest-impact, lowest-effort items surface first.

Initiative	Impact (H/M/L)	Effort (H/M/L)	Priority

6. Roadmap & action plan

Action	Owner	Timeframe (30/60/90)	Status

7. Ownership & next steps

Who owns what after this call, and what's the check-in cadence?

Next step: Confirm scope and send proposal within 2 business days.