

Discovery Call

CHECKLIST

0-5 MINUTES

Warm-Up & Framing

Purpose: Build rapport and set expectations for the call.

Goal: Quickly understand what they do and why they're here.

- ☐ What's your business and what do you offer?
- ☐ How long have you been in business?
- ☐ Why are you looking to invest in branding right now? (*new business, rebrand, or brand refresh?*)

5-12 MINUTES

Current Brand & Challenges

Purpose: Understand their current positioning and what's prompting this change.

Goal: Spot pain points, motivations, and potential scope.

- ☐ Do you currently have branding in place? If yes, what's working and what's not?
- ☐ What's motivating you to explore a rebrand or new design?
- ☐ Who's your target audience or ideal customer?
- ☐ Where are you currently showing up or promoting your business? (*website, social, etc.*)

12-20 MINUTES

Goals & Expectations

Purpose: Learn what success looks like for them and how they like to collaborate.

Goal: Gauge their mindset and compatibility.

- ☐ What do you hope new branding will help you achieve?
- ☐ Have you worked with a designer before? How was that experience?
- ☐ How involved do you like to be in the creative process?
- ☐ Do you have any upcoming launches or timelines that would affect the project?

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20-27 MINUTES

Project Scope & Fit

Purpose: Clarify logistics to assess if you align on process, timing, and budget.

Goal: Identify project scale and readiness.

- ☐ What kind of brand assets are you looking for? (logo suite, full identity, packaging, etc.)
- ☐ When are you hoping to start?
- ☐ Do you have a budget or investment range in mind?

25-30 MINUTES

Wrap-Up & Next Steps

Purpose: Leave with clarity and confidence for both sides.

Goal: Confirm mutual fit and explain what happens next.

- ☐ Do you have any questions about my process or how I work with clients?
- ☐ Based on what we've discussed, would you like me to send a proposal or package overview?
- ☐ Confirm next steps + thank them for their time.

During or after the call, jot down:

- *Potential red flags: unrealistic expectations, unclear goals, controlling tendencies, budget mismatch.*
- *Green flags: clear communicator, values alignment, open to creative collaboration, Aligns with your style, realistic timeline.*
- *Opportunities: possible upsells (packaging, collateral), rebrand timing, strong market gap.*
- *Fit summary: yes / no / maybe, and why.*