Consultation Preparation Worksheet

Prepare the concern and the decision you need help making. Complete what you know; missing records should not prevent an introductory conversation.

Name / business name / completion date

Business type / stage (planning, starting, established) / contact email

Meeting date / free 15-minute intro or 60-minute consultation

The situation

What is happening now? Include a concrete example.

When did it begin? What have you tried, and what happened?

Business impact: time, money, missed work or another consequence

Nearest deadline / what happens if the issue is not addressed

What would you like to understand or decide by the end of the meeting?

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Choose priorities and prepare only information relevant to the conversation.

Three priorities

Priority 1 / why it matters / decision needed

Priority 2 / why it matters / decision needed

Priority 3 / why it matters / decision needed

Optional preparation

Bring relevant scan results if completed, goals and deadlines, financial summaries, process or project records, names of decision-makers and questions. A completed scan is not required for an introductory call.

Available documents / missing information / person who can help locate it

Questions for Quoti / boundaries or constraints to consider

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Use this page to turn the review into a practical request for help.

What would you like Quoti to help you understand or complete?

Most important deadline / reason it matters

Information still needed / who will obtain it / target date

Choose a useful next step

For help discussing your concerns, book a free 15-minute introduction. It establishes fit; detailed review, written plans and implementation are separately scoped and priced.

Talk with Quoti: quoticonsulting.com/book-consultation

A deeper Business Health Scan uses business answers and financial figures. The online 21-item Underneath the Business checklist is a separate concern-gathering tool.

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