

**SMB**  
**customer**  
**discovery**  
**template**

**with email script**

# The first question

Ask how the business works  
(I guarantee you don't know everything  
already)

“I would love it if you could lead  
me through the entire structure,  
from creating your  
product/service to selling it.  
Who does what, when?”

# Now get into the meat

What is your main source of revenue/profit?

- Do you have alternative sources of revenue?

What are your biggest costs?

- Top 3?

What takes the most time for you as the owner each week?

- What takes the most time for your employees each week?

What are your current efforts in:

- Marketing
- Sales
- Hiring / Firing
- Workflow
- Customer Service
- Money management
- Product creation
- Supply chain

What tools are you using for each of the above operations?

- How much do you pay for each tool?

Do you outsource, contract or automate any business processes?

What is the most annoying or painful thing you have to deal with daily as a business owner?

- (You want to dive deep on this)

## And to finish up

What should I have asked that I didn't?

Who else should I talk to for more insight on this?

- Follow up with "Would you be willing to introduce me?"

# Email script

Hello, **[name, if known]**!

I'm a student doing research into the **[business]** business model for a school project. The goal of my research is to create a tool to make your daily operations more efficient, and I would love it if you could give me some advice! However, as a student, I don't know much about the problems you face day-to-day.

Would the owner of **[business]** be open to an interview? I'm sure I would learn a lot!

Let me know, and if you're open to it, we can schedule something at your convenience.

Best,  
Max