

Discovery Call Notes (Template)

Capture the right information once — so quoting is faster and cleaner.

Customer + project basics

Customer name	Business	Phone	Email
Address / site	Best time to contact	Decision-maker(s)	How did they find us?

What do they want?

- Desired outcome (in their words): _____
- What matters most? (speed / quality / budget / minimal disruption / warranty):

- Ideal timeframe: _____

Scope essentials

Key scope items	Notes / assumptions

Budget + decision process

Budget range (if known)	Other quotes? (Y/N)	Decision date	Next step agreed

Risks / constraints

- Access constraints / site conditions: _____
- Compliance / approvals required: _____
- Anything that could cause variation later: _____