



Full Discovery questionnaire

This is the complete questionnaire so you can prepare at your own pace. When you are ready, fill it out online and receive a copy by email: <https://docs.instfy.com/en/form-discovery/>

Estimated time: 40 to 60 minutes, with your draft saved automatically · Fields marked * are required in the online form. Never write passwords in this questionnaire.

Your details

So we can send your copy and get back to you.

1. Full name *

2. Email *

3. Phone or WhatsApp

4. Your role

5. Company *

6. Company website or social profile

7. City and country

1. Who you are

The nature of the business and the people behind it.

8. Business profile *

Choose one option

- ☐ Company being created ☐ Startup ☐ Small or mid-sized business ☐ Family business
☐ Established company ☐ Business group ☐ Manufacturing ☐ Retail ☐ Services ☐ Franchise
☐ Personal brand ☐ Public institution ☐ Multinational

9. Industry

10. Legal name and country of registration

11. Year founded

12. Locations, cities or countries where you operate

13. Tell the story of the business in a few lines *

14. Partners or founders and the role of each

2. Where you are: business and market

15. Main products or services *

16. How the business makes money (revenue model)

17. Who your customers are and why they buy from you *

18. Sales channels

Check all that apply

- ☐ Direct sales ☐ Physical store ☐ E-commerce ☐ Marketplaces ☐ Reps or distributors
☐ Partners and referrals ☐ Public sector bids

19. Approximate annual revenue

Choose one option

- ☐ I prefer not to say ☐ No revenue yet ☐ Up to US\$ 250k ☐ US\$ 250k to 1M ☐ US\$ 1M to 10M
☐ Over US\$ 10M

20. Over the last 12 months revenue has

Choose one option

- ☐ Grown ☐ Stayed flat ☐ Declined ☐ No revenue yet

21. How would you rate the business margin today?

Rate from 1 to 5

- Very low ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Very healthy

22. What sets you apart from competitors?

3. Where you are: operations, people and technology

23. Team size

Choose one option

- ☐ Just me ☐ 2 to 10 ☐ 11 to 50 ☐ 51 to 200 ☐ More than 200

24. How the team is organized (areas and leaders)

25. Most critical processes, or the ones that get stuck most

26. Tools and systems in use

Check all that apply

- ☐ Spreadsheets ☐ ERP ☐ CRM ☐ E-commerce or POS ☐ BI tools and dashboards ☐ AI tools
☐ In-house systems

27. Which systems (names)?

28. Which metrics do you track today?

29. How do marketing and sales work today?

30. How much does the business depend on the founder day to day?

Rate from 1 to 5

Little ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Completely

4. Where you want to go

The business should serve the company strategy and, when it makes sense, the life of the people behind it.

31. Goals for the next 12 months *

32. Where the business should be in 3 years

33. Ambitions involved

Check all that apply

- ☐ Grow revenue ☐ Improve margin ☐ New products or services ☐ New markets in the country
- ☐ Go international (e.g. United States) ☐ Digital transformation and AI ☐ Strengthen the brand
- ☐ Raise investment ☐ Succession or sale of the business ☐ Social or environmental impact

34. How will we know it worked?

35. And for you personally: what does this business need to provide?

5. Your context

We look from the outside in: world, country, region, market and business.

36. Main competitors or alternatives

37. Market changes that worry or excite you

38. Companies you admire or use as a reference

6. Your constraints

Ambition without constraints leads to unrealistic strategy.

39. Capital available for the next cycle

Choose one option

☐ Very limited ☐ Moderate ☐ Comfortable ☐ I prefer to discuss it in a call

40. Time horizon to see results

Choose one option

☐ Up to 3 months ☐ 3 to 6 months ☐ 6 to 12 months ☐ More than 12 months

41. Risk appetite

Rate from 1 to 5

Conservative ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Bold

42. Team, legal or operational limits we should consider

43. What are you not willing to do?

People and materials

44. Who we should interview (name, area and contact)

45. Links to materials (decks, reports, spreadsheets)

Use sharing links. Never send passwords here.

46. Best days and times for meetings

47. Anything else we should know?
