

Organizational Assessment — Discovery Intake

Prepared for: Client Leadership (Digital Marketing Agency, Confidential)

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To ground this assessment in how the organization actually operates today — rather than general industry assumptions — the items below would be genuinely useful. For each, either attach an existing document or check "N/A" and jot a one- or two-line answer; nothing here needs to be prepared from scratch. Aggregated or directional figures are perfectly fine where exact numbers are sensitive.

1. Product & Commercial Overview

How offerings are packaged, priced, and sold today

Item requested		
Current service/product catalog (packages, tiers, pricing)	☐ Attached	☐ N/A — quick answer below
Sales enablement materials (proposal templates, scoping docs, sales decks)	☐ Attached	☐ N/A — quick answer below
Documented Ideal Customer Profile(s), if formalized	☐ Attached	☐ N/A — quick answer below
Win/loss notes or data, if tracked	☐ Attached	☐ N/A — quick answer below

Quick answer / notes:

2. Economics & Performance

Profitability, retention, and known pain points by offering

Item requested		
Margin/profitability by service line (aggregated is fine)	☐ Attached	☐ N/A — quick answer below
Client retention/churn rate, average contract value & length	☐ Attached	☐ N/A — quick answer below
Known examples of margin leakage or scope creep	☐ Attached	☐ N/A — quick answer below

Quick answer / notes:

3. Operations & Delivery

How work moves across teams today

Item requested		
Org chart — Sales, Product, Delivery, Operations, Creative, Automation	☐ Attached	☐ N/A — quick answer below
Existing SOPs, scoping templates, or onboarding/handoff workflows	☐ Attached	☐ N/A — quick answer below
Examples (even anecdotal) of inconsistent delivery across	☐ Attached	☐ N/A — quick answer below

Item requested		
teams		

Quick answer / notes:

4. Technology Stack Evaluation

Full inventory to assess what to keep, consolidate, or replace

Item requested		
Full tech stack inventory by function (SEO, PPC, social, email, web dev, analytics, Amazon, creative)	☐ Attached	☐ N/A — quick answer below
Contract/licensing terms and renewal dates for major platforms	☐ Attached	☐ N/A — quick answer below
Which tools are proprietary/custom-built vs. licensed/vendor	☐ Attached	☐ N/A — quick answer below
Known pain points: integration gaps, manual workarounds, redundant/overlapping tools	☐ Attached	☐ N/A — quick answer below
Any tools already under review or being piloted as replacements	☐ Attached	☐ N/A — quick answer below
Aggregated annual technology spend (licensing/subscriptions)	☐ Attached	☐ N/A — quick answer below
Notes on AI pilots already run — what worked, what didn't	☐ Attached	☐ N/A — quick answer below
Existing reporting/KPI dashboards, if any	☐ Attached	☐ N/A — quick answer below

Quick answer / notes:

5. Talent & Skills Capability

Whether current staff can support the tech and growth roadmap

Item requested		
Headcount and skill areas by function (who owns what technically today)	☐ Attached	☐ N/A — quick answer below
Skills/competency matrix, if one exists (e.g., automation, dev, data/analytics fluency)	☐ Attached	☐ N/A — quick answer below
Recent hiring for tech/AI-related roles — outcomes, time-to-fill, gaps found	☐ Attached	☐ N/A — quick answer below
Current training/upskilling programs or certifications supported	☐ Attached	☐ N/A — quick answer below
Leadership's current view on build vs. buy vs. partner for new capabilities	☐ Attached	☐ N/A — quick answer below
Known skill gaps seen as limiting current growth or new offering plans	☐ Attached	☐ N/A — quick answer below

Quick answer / notes:

6. Client Voice

How clients experience the organization today

Item requested		
Recent client feedback, NPS/CSAT data, or internally tracked reviews	☐ Attached	☐ N/A — quick answer below
2–3 client case studies spanning different service lines	☐ Attached	☐ N/A — quick answer below

Quick answer / notes:

7. Strategic Context

Where leadership wants the business to go

Item requested		
12–24 month growth targets or OKRs, if shareable at this stage	☐ Attached	☐ N/A — quick answer below
New offerings or capabilities leadership wants to grow into	☐ Attached	☐ N/A — quick answer below

Quick answer / notes:

Thank you — happy to hop on a short call instead of written answers for any section, or to work directly with a Sales/Delivery lead if that's easier to coordinate.