

Client Discovery Questionnaire

The first step toward understanding where you are, where it hurts, and where you want to go.

01 About You & Your Company

Company / Brand Name

Your Name & Title

Email

Phone

Product Categories (e.g., wovens, knits, footwear, accessories)

Team Size Involved in Product Development

Styles Developed per Season

02 Current State

How product development actually runs today.

What tools do you currently use to manage product development?

Spreadsheets (Excel / Google Sheets)

Email & shared drives

PLM software (please name it below)

Project management tool (Monday, Airtable, etc.)

ERP module

No formal system — mostly memory & habit

If a PLM or named tool: which one, and how well is it serving you?

Roughly how many hours per week go into manual status updates, chasing approvals, or re-entering the same data across systems?

03 Pain Points

Where does the process break down, slow down, or lose people money?

Which of these currently cause the most friction? (check all that apply)

Missed or unclear critical path dates

Sample tracking & version confusion

Costing accuracy & margin erosion

Fit & tech pack inconsistency

Data trapped in email threads

Color / lab dip approval delays

Vendor / factory communication gaps

Freight delays or cost overages

Visibility across brands or teams

Repeating the same mistakes season over season

Other pain point not listed above

Describe the single most painful moment in a recent season —
what happened, and what did it cost you (time, money, a relationship)?

How are decisions made today when something goes off track —
who decides, and how is that decision remembered later?

04 Aspirations

Where you want product development to be able to take you.

If this were fixed a year from now, what would be different —
for your team, your product, and your bottom line?

What would you never want to lose or change about how you work today?

What has stopped you from fixing this already?

Budget

Not sure what “good” looks like

Buy-in from leadership

Team bandwidth

Past tools/consultants didn’t deliver

Other

05 Engagement Logistics

Timeline you’re hoping to move on

Budget Range (if known)

Who else should be part of this conversation?

Anything else we should know before we talk?

Thank you — completing this helps us spend our first call on solving, not surveying.

Return this form to discovery@kestreloneos.com