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Sales Discovery Sheet

Updated May 13, 2025

Name: _____ Already Have ☐

Project Address: _____ Already Have ☐

Home Address: _____ Already Have ☐

Phone #: _____ Already Have ☐

Email: _____ Already Have ☐

Lead Source: _____ Already Have ☐

Point #2

Tell me a little bit about what you are hoping to achieve through this project.

We want to identify a rough scope of work, type of space, level of finish, etc

Notes:

Point #3

What is causing you to decide to explore this project now?

We want to identify the pain point, the driving force

Notes:

Point #6 Tell me a little bit more about the finished space or project, and what could you tell me about the existing home and conditions (age, existing finishes / components, site conditions, unique characteristics)?
Get to second level of detail and development of project vision, refine and affirm the pain point and solution.

Notes:

Point #9 What kind of timeline are you considering for this project?
Identify any deadlines or completion dates – can be used to work backward and create urgency

Notes:

Point #10 Do you have an ideal budget that you are looking to invest in this project (tie to pain point, if possible)?
Most will not fully share budgets and that is fine – the intention is to introduce budget conversations, and to potentially begin to set budget expectations

Notes:

Additional Notes:

Discovery Completion Checklist:

Next steps identified and confirmed ☐

Follow-up email sent w/ Intro Video asset ☐

CRM updated ☐

Discovery Sheet uploaded to JobTread ☐