CLIENT PREPARATION · 90 MINUTES

Your Discovery Session

You asked to talk with us. This covers what the session does, what it costs, and the one thing we need from you beforehand.

We spend the ninety minutes on your problem, not on our background.

Bring one priority and the decision your team is trying to make. We work through what is actually happening, what is slowing it, and what would have to be true for an engagement to be worth doing. A short written summary is enough; no presentation is required. You get our honest read on fit, including when the answer is that you do not need us, or that another firm is better placed.

WHAT YOU LEAVE WITH

- A problem statement your leadership team will recognize
- The constraint we believe is actually binding, and why
- The evidence that would settle the decision in front of you
- Our read on fit, stated plainly
- A named next step, whether or not it involves us

TWO WAYS TO DO THIS

OPTION A

Discovery Session

$250 · 90 minutes

Everything described above, worked through together and delivered verbally in the session. No written product.

OPTION B

Session + Written Diagnostic

$1,000 · 3 business days

Everything in Option A, plus a written problem statement, an evidence summary, the options with trade-offs made explicit, and a scoped proposal with deliverables, responsibilities and price.

You can decide at the end. Start at $250. If the written diagnostic turns out to be worth having, the balance is $750. Nobody is asked to commit to the larger option before meeting us.

SCHEDULING	A calendar invite with a video link, sent within one business day of booking.
PLATFORM	Microsoft Teams, or a telephone bridge if you prefer.
PAYMENT	Invoiced at booking. The session is confirmed once payment clears.
RESCHEDULING	Any time up to 24 hours before the session, at no cost.
DIAGNOSTIC DELIVERY	Within three business days. Day one is the next business day after the session; weekends and U.S. federal holidays are excluded, so a Monday session means Thursday delivery. If something essential is missing we agree revised timing with you.
FEE CREDIT	Credited in full toward a follow-on services agreement signed within 90 calendar days of the session (Option A) or of diagnostic delivery (Option B). Maximum total credit $1,000; the $250 is never counted twice. The credit reduces the engagement fee rather than being returned as cash.
BEFORE WE MEET	Send the brief on pages 2 and 3 at least 48 hours ahead. It is the single thing that changes how useful the session is.

Fifteen minutes here buys you ninety better ones.

Send this to **dave@innotechconsulting.us** at least 48 hours before we meet, as a document or in the body of an email, whichever is faster for you. We read it beforehand so the session starts on your problem instead of on background.

There is a second reason worth knowing. If we go on to work together, what you write here becomes the opening section of the proposal and, later, of the statement of work. Nothing you tell us now gets asked for a second time.

PARTIAL IS FINE

Estimates, ranges and honest gaps are more useful than polished answers. A blank you cannot fill is itself a finding, and it is often the most productive thing we discuss.

1 · THE PRIORITY	ONE INITIATIVE, NOT A PORTFOLIO
The problem, in your words Plain language, not a solution	
If nothing changes What it costs to leave alone	
What you have tried And what it taught you	

2 · WHAT SUCCESS LOOKS LIKE	OBSERVABLE, NOT ASPIRATIONAL
The outcome Something you could point at later	
How you would measure it Current baseline if you have one	
The decision this informs And the date it has to be made	

3 · WHO DECIDES	SCOPE FOLLOWS AUTHORITY
Owns this priority Name and role	
Signs the agreement If different from above	
Must also agree Finance, legal, security, a board	

4 · CONSTRAINTS	RANGES ARE FINE
Budget under discussion A range is enough to scope against	
People available Who can give this real hours	
Data and systems What you hold, and its condition	
Commitments already made Vendors, contracts, regulatory or customer requirements	

5 · FOR SCOPING	SO A PROPOSAL TAKES ONE ROUND, NOT THREE
Legal entity and state The name that would appear on an agreement	
Type of buyer Commercial, government, or investor-backed	
If government Funding source, appropriation, vehicle, requirement status	
Sensitive information Will the work touch CUI, PII, or third-party proprietary data	

6 · WHO WILL ATTEND	TWO TO FOUR WORKS BEST
Names and roles And what each needs out of the session	

WHAT WE DO WITH THIS

We use it to prepare for the session and to write any proposal that follows. We do not share it, sell it, or add you to a mailing list, and it is destroyed on request.

WHAT NOT TO SEND

Share what you can through ordinary channels. Classified information, CUI, procurement-sensitive material, trade secrets and confidential client information should not travel by email or web form. Tell us it exists and we will agree suitable arrangements first.

Government requirements follow the applicable contracting process and are scoped separately from the commercial options on page 1. Send the notice, or a non-sensitive description of the requirement, and we respond with a capability statement and a fit assessment within three business days.