

Client Pain Points and Needs Assessment Form

Instructions: Please complete this assessment to help us identify your core challenges, operational bottlenecks, and strategic goals.

1. General Client Information

Client Name:

Company / Organization:

Job Title / Role:

Date of Assessment:

2. Primary Pain Points & Challenges

What is the single biggest challenge your organization is facing right now?

How long has this challenge been ongoing, and what is its daily impact?

What temporary workarounds or quick fixes are you currently using, if any?

What are the financial, operational, or emotional costs of not solving this problem?

3. Needs Assessment & Desired Outcomes

What does an ideal solution look like for your team?

What are the top three features or capabilities you need in a new solution?

How will you measure the success of a newly implemented solution?

4. Constraints, Budget, and Timeline

What is your target timeline or deadline for implementing a solution?

What budget parameters or financial constraints should we keep in mind?

Who else within the organization needs to be involved in the decision-making process?

5. Additional Notes & Comments

Please list any other details, requirements, or concerns not covered above: