



OPEXEDGE CONSULTANCY

Operational Excellence | Lean Six Sigma | ISO Quality Systems

Product & Service Lifecycle Management Framework

Client Discovery Questionnaire

How this works

This questionnaire captures the real, specific facts of your business across all seven stages of the OpexEdge lifecycle framework — from initial feasibility through to customer experience. There are no right or wrong answers, and it's normal to have gaps in earlier stages if you haven't reached them yet. Answer as precisely as you can with real numbers where you have them; where you don't, your best estimate is fine.

Your answers are used to generate a personalized roadmap, project sheets, KPI dashboards, SOP templates, and stage-by-stage recommendations — benchmarked against current industry data and named operational-excellence methodologies.

Estimated completion time: 45-75 minutes. You do not need to complete it in one sitting.

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SECTION 0 · BEFORE YOU BEGIN

Business Fundamentals

The essential facts every other section will build on.

What this section produces: Business identity, industry context, and your own read on what stage you're actually at.

1. Business / brand name

2. Founder(s) name(s) and role(s)

3. Year the business/venture was started

4. Country / city of operation

5. Industry and product/service category

Business model

- ☐ B2C (selling direct to consumers)
- ☐ B2B (selling to businesses)
- ☐ B2B2C / marketplace
- ☐ Hybrid / other (please specify below)

6. If hybrid or other, please describe

Where are you today? (self-assessment)

- ☐ Idea stage only - nothing built or tested yet
- ☐ Testing demand - built something small, running early experiments
- ☐ Operating & selling - real customers, real revenue, but not yet profitable/stable
- ☐ Profitable & scaling - unit economics work, now growing
- ☐ Mature & optimizing - established, focused on efficiency and expansion

7. In one or two sentences: what specific customer pain point does your business solve?

8. In one or two sentences: what is your solution / what makes it different?

STAGE 1 · FEASIBILITY & LEAN VALIDATION

Testing Demand Before You Build

Anchored in Lean Startup (Ries) and Customer Discovery (Blank) methodology.

What this section produces: A benchmarked read on whether your demand validation was statistically credible, and which product/category signals to build on.

Market context

1. What is the total size of your target market (your best estimate, with source if you have one)? (e.g., "\$2B total furniture market in Egypt")

2. What percentage of that market is currently served online / by your type of solution?

How you validated demand

- ☐ Built a live storefront/website and drove paid traffic to it (smoke test)
- ☐ Built a simple landing page to capture interest/signups
- ☐ Ran a concierge/manual pilot with a small group of real customers
- ☐ Conducted customer interviews / surveys only, no transactions
- ☐ Took pre-orders or deposits before building
- ☐ Have not yet tested demand

3. How many months did your validation period run, and what was your approximate monthly spend (ads, tools, etc.)?

Funnel data (if you ran paid traffic)

4. Total website visits during the test period

5. Add-to-cart rate (% of visits that added an item to cart)

6. Checkout-initiation rate (% that started checkout)

7. Conversion rate (% that completed a purchase) and total orders achieved

8. ROAS (return on ad spend) or CAC (cost per order) during this period, if known

What you learned

9. Which specific product(s)/category(ies) or offer(s) performed best and became your focus?

10. What did you decide NOT to pursue based on this test, and why?

STAGE 2 · OPERATIONAL BUILD-OUT

Make-vs-Buy & Supplier Scoring

Anchored in weighted supplier scorecard methodology and make-vs-buy decision frameworks.

What this section produces: A weighted supplier scorecard, a make-vs-buy map of your functions, and a flag on any category-specific logistics risk.

Suppliers / sourcing

1. How many suppliers or manufacturing partners have you evaluated or are currently using?

Rate how important each factor is to your supplier decisions (1 = not important, 5 = critical)

Cost / unit price: 1 2 3 4 5

Quality / defect rate: 1 2 3 4 5

Minimum Order Quantity (MOQ) flexibility: 1 2 3 4 5

Lead time / delivery reliability: 1 2 3 4 5

Service / responsiveness: 1 2 3 4 5

2. Do you currently document supplier scores, or is selection informal/gut-feel?

Fulfillment & logistics

3. Do you have warehouse/fulfillment space? If yes: size (sqm) and monthly cost

4. Number of fulfillment/warehouse staff currently

5. Which courier(s)/delivery partners do you use?

6. Does your product category have any special logistics constraints (bulky, fragile, cold-chain, installation-required, limited courier options, etc.)?

Make vs. buy

7. Which functions do you currently outsource (e.g., marketing, sales, customer service, fulfillment) and to whom?

8. Which functions do you keep in-house, and why?

9. What has been your single biggest operational bottleneck so far?

10. How long (in months) have you been operating with your current setup?

STAGE 3 · UNIT ECONOMICS & CAPITAL VALIDATION

Proving the Model Before You Scale

Anchored in contribution-margin analysis and startup funding-stage taxonomy (pre-seed/seed/Series A).

What this section produces: A contribution-margin diagnosis, a funding-stage positioning read, and a 90-day proof-of-concept gate tailored to your numbers.

Traction to date

1. Total completed orders / transactions to date

2. Total revenue to date

3. Average Order Value (AOV)

Unit economics

4. COGS as a % of revenue (cost of goods sold)

5. CAC (customer acquisition cost) per order

6. Gross profit per order (price minus COGS)

7. If known: contribution margin per order (gross profit minus CAC and other variable costs). If not known, we will calculate it from your other answers.

8. What do you believe is causing your biggest unit-economics gap, if any? (*COGS too high / CAC too high / AOV too low / other*)

Capital

9. Are you currently raising, or planning to raise, capital? If yes, how much?

☐ Personal savings

- ☐ Friends & family
- ☐ Angel investor(s)
- ☐ Venture Capital fund
- ☐ Bank loan / debt financing
- ☐ Not currently raising

10. If raising, what is your intended use-of-funds breakdown? (e.g., % to inventory, % to marketing, % to operations, % to headcount, % reserves)

11. What specific number or milestone would tell you "it's time to scale"? (e.g., positive contribution margin, X% sell-through, Y months of sustained profit)

STAGE 4 · ORGANIZATION & INDUSTRIALIZATION

Building the Organization Beyond the Founder

Anchored in Greiner's organizational growth model and RACI accountability structures.

What this section produces: A functional org-chart recommendation, a RACI matrix for your core processes, and an ERP/inventory-model recommendation.

Team today

1. Current headcount, excluding founder(s)

2. List the roles/functions currently covered (in-house or outsourced)

3. What decisions or tasks currently require the founder personally, that ideally shouldn't?

4. Do you have a written organizational chart today?

Systems

5. Do you use an ERP, inventory system, or accounting software today? If yes, which one?

6. How many SKUs/products are in your current core ("hero") portfolio?

7. Is your reorder/inventory-replenishment process documented, or informal?

Production

8. Do you rely fully on external suppliers, or do you have (or want) owned production/manufacturing capability?

STAGE 5 · PROCESS STANDARDIZATION & QUALITY SYSTEMS

Making the Business Repeatable

Anchored in SOP documentation discipline and the ISO 9001 Quality Management System standard.

What this section produces: A gap analysis against ISO 9001, an SOP priority list, and a certification-vs-internal-QMS recommendation.

1. Do you have written SOPs (standard operating procedures) for your core processes today? Which exist, and which are missing?

2. Have any customers or partners ever asked whether you're ISO-certified or similar?

Interest in certification

- ☐ Yes, actively interested in ISO 9001 certification
- ☐ Interested in an internal quality system, not formal certification
- ☐ Not sure / need more information
- ☐ Not a priority right now

3. What's your biggest example of process inconsistency today? *(e.g., different staff handle the same task differently, or steps get skipped under pressure)*

4. Do you expect to sell to larger corporate, institutional, or export/B2B buyers who might require formal certification?

STAGE 6 · PERFORMANCE MANAGEMENT & SCALE

Measuring What Matters, Then Growing Deliberately

Anchored in KPI/OKR performance management and the Ansoff Product-Market Growth Matrix.

What this section produces: A consolidated KPI dashboard template, a quarterly OKR starter, and an Ansoff-based ranking of your next growth moves by risk.

What you track today

1. What KPIs/metrics do you track today, and how often (daily/weekly/monthly)?

2. Do you use any formal goal-setting system today (OKRs, quarterly targets, none)?

Where you want to grow next — rank in order of priority (1 = first priority)

- ☐ ___ More of the same: deepen share with current products in current market
- ☐ ___ New geography or new customer segment, same products
- ☐ ___ New products/SKUs for your current customers
- ☐ ___ New products AND new markets simultaneously

3. Are you considering geographic or export expansion? If yes, where?

4. Are you considering new sales channels (B2B/wholesale, retail, marketplaces, contract/institutional)? If yes, which?

STAGE 7 · CUSTOMER SERVICE & EXPERIENCE

The Capstone: Turning Customers Into Advocates

Anchored in NPS (Reichheld), CSAT, and CES (CEB/Gartner) — the three-metric customer experience system.

What this section produces: A three-metric CX dashboard (NPS/CSAT/CES) with 2026 benchmark targets, and a survey-trigger map for your customer journey.

1. How do you currently handle customer complaints and returns?

2. Do you track any customer satisfaction metrics today (reviews, ratings, NPS, other)? If yes, what are your current numbers?

3. What is your estimated return / complaint rate (%)?

4. What is the single most common customer complaint you receive?

5. Do you have a dedicated customer service resource today (person, team, or agency)?

6. On a scale of 1 (very hard) to 7 (very easy), how easy do you believe it currently is for a customer to resolve a problem with you?

Submission

Thank you for completing this questionnaire. Once submitted, OpexEdge will prepare your personalized 7-stage roadmap, including:

- A stage-by-stage assessment of where your business stands today, and the gaps between stages
- Project sheets and templates specific to your current stage (supplier scorecards, KPI dashboards, RACI matrices, SOP starters, or CX dashboards, as relevant)
- Benchmarks against current industry data, so you can see how your numbers compare
- A prioritized action plan for your next 90 days

Please return this completed questionnaire to your OpexEdge consultant, along with any supporting data you have (sales exports, ad reports, P&L, pitch materials, etc.).

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