



# PRE-ENGAGEMENT ALIGNMENT DOCUMENT

*Strategic Alignment Before We Begin*

*Before we ask a single question about what to build — we start with WHY. This document is designed to help us understand what you're facing, what you believe is causing it, and what success looks like to you. Your answers shape everything that follows.*

## CLIENT INFORMATION

| Company Name | Your Name & Title | Date Completed |
|--------------|-------------------|----------------|
|              |                   |                |

## HOW TO USE THIS DOCUMENT

Please complete this document and return it one week before our engagement begins. There are no right or wrong answers — only honest ones. Your responses will be used to prepare a starting point summary that we will walk through together in our first session. The more specific and candid you are, the more valuable our first conversation will be.

## YOUR STRATEGIC ALIGNMENT QUESTIONS

1

**What are the top 3 problems your business is facing today?**

*Be as specific as possible — symptoms, patterns, and how long they have been present.*



**2**

**What do you believe are the top causes of those problems?**

*List up to 5. Don't filter — include causes you suspect even if you can't fully prove them yet.*

**3**

**What are the biggest risks if these problems are not addressed?**

*Think about the consequences to revenue, customers, team, and competitive position if nothing changes.*

**4**

**What do you believe the solution looks like?**

*A new product or service? A new market? Enhanced systems or capabilities? A change in how you operate? Share your current thinking — even if it is early.*



5

**Do you see AI playing a role in the solution? If so — where and how?**

*There is no wrong answer here. If you are unsure, say so. If you have specific ideas, share them. We will help you evaluate whether and where AI creates real value.*

6

**How will you measure success?**

*What metrics, KPIs, or outcomes would tell you that this engagement delivered what you needed? Be as specific as you can.*

7

**What is the timeline you are working within?**

*Is there a hard deadline? A board commitment? A market window? Understanding the urgency helps us sequence the work appropriately.*

8

**Do you currently have the internal skills to support this effort?**

*If not — do you have a plan to acquire them? Understanding capability gaps upfront helps us build a realistic plan.*



9

### Who in your leadership team needs to be involved?

*Who are the key stakeholders, decision-makers, and influencers whose involvement will be critical to success?*

10

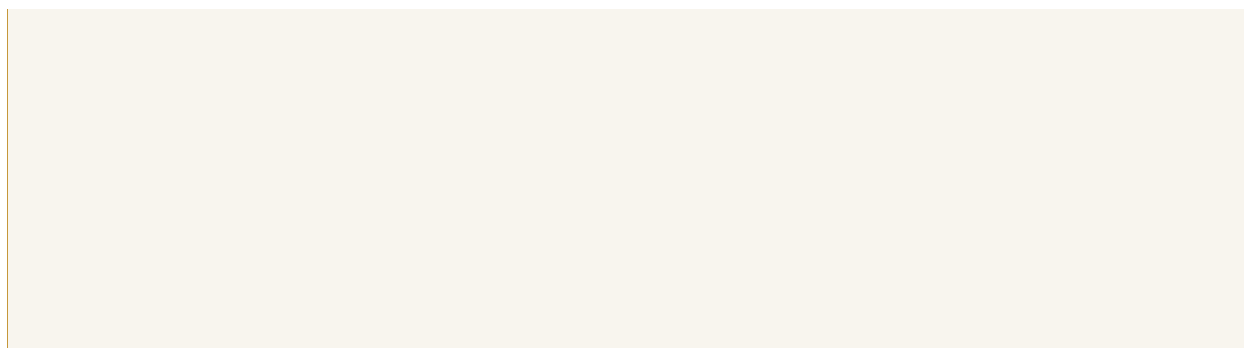
### Have you attempted to address this before? If so — what happened?

*Understanding what has been tried, what stalled, and what resistance exists is one of the most valuable things we can know before we begin.*

*One last thing — and it is the most important question of all:*

### **WHY is change necessary right now?**

*Not what needs to change — but why the moment is now. What is making this urgent? What happens if another year passes without action? Your answer to this question will shape everything we do together.*



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*The right questions change everything.*

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