



CLIENT INTAKE FORM

Please complete this interactive form directly on your device to provide your project details.

1. COMPANY INFORMATION

Company Name

Website

Industry

Headcount

Location(s)

Primary Contact Name & Role

Email & Phone Number

2. PROJECT TYPE (Select all that apply)

☐ Process Automation (Workflows, AI Agents)

☐ System Optimisation (CRM / ERP / ATS)

☐ Data Insights / Dashboards

☐ Custom Tooling or Internal IP Build

☐ AI Integration (LLMs, Copilots, Chatbots)

☐ Other (please specify):

3. CURRENT SITUATION

What processes or tasks are currently manual, slow, or error-prone?

What tools or systems are currently in use? What is triggering the need for this project now?

What initiatives or solutions have already been tried (if anything)?

4. DESIRED OUTCOMES

Primary Goal

Secondary Goals

What does success look like in 90 days?

What would be a "game-changer" outcome?

5. TECHNICAL ENVIRONMENT

Systems layout: CRM / ERP / ATS / Databases / Spreadsheets / APIs

Current Systems & Data Sources (Internal, external, third-party, manual inputs)

Integrations Required

Security
Requirements
(e.g., SOC2,
ISO, GDPR)

Hosting Preference: ☐ Cloud ☐ On-Premise ☐ Hybrid

6. DATA INSIGHTS REQUIREMENTS

What decisions need better data support & what KPIs matter most?

Do you need dashboards, reports, alerts, or predictive models?

Are there any known data quality or data consistency issues to be aware of?

7. BUDGET & DECISION MAKING

Budget Range:

☐ £5k – £10k ☐ £10k – £25k ☐ £25k – £50k ☐ £50k+

Projected Timeline:

☐ Immediate ☐ 30 Days ☐ 60 – 90 Days ☐ Longer-term

Key Decision Maker(s)

Procurement or Approval Steps

8. ACCESS & CONSTRAINTS

Required Access (Systems, APIs, databases, or client/platform accounts)

Any known constraints or blockers? (IT policies, compliance parameters, internal bandwidth)

Preferred Working Style: ☐ Asynchronous ☐ Weekly Progress Calls

☐ Deeply Embedded Support

9. ADDITIONAL NOTES & MATERIALS

Is there anything else we should know prior to our engagement?

Relevant Documents, Links, or Reference Materials: