

Client Intake Form

Collect the information needed before a kickoff or proposal so vague interest becomes a clear next step.

OpsKit Library — editable operating template

Client basics

Client/company: _____

Primary contact: _____

Email: _____

Phone: _____

Website: _____

Decision maker: _____

Budget range: _____

Target start date: _____

Project context

What problem are you trying to solve?

Notes / Draft

Why now?

Notes / Draft

What happens if this is not solved?

Notes / Draft

What have you already tried?

Notes / Draft

What would a successful outcome look like?

Notes / Draft

Fit screen

Done	Item	Owner / Notes
☐	Decision maker is involved	
☐	Budget range is plausible	
☐	Timeline is realistic	
☐	Scope can be explained in plain English	
☐	Client has capacity to provide inputs	
☐	Next step is clear	

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