CLIENT INTAKE BRIEF

BEFORE WE START

This takes about 20 minutes. Don't overthink any of it. Write what's true right now, not what you wish were true. Incomplete or messy answers are fine. Blank answers tell me something too. This document stays between us. I use it to make our first session more useful and less time spent on introductions.

THE BUSINESS

Business name:

How long have you been operating:

How many people work in or for the business, including you:

What do you sell (products, services, or both):

How would you describe what you do to someone who has never heard of you:

WHO YOU PAY INSIDE THE BUSINESS

List anyone who works in the business in any capacity, what they do, and whether they're an employee, contractor, or partner. If a role has multiple people, just list the role specifically and what the function of the role is.

Name / Role / Employee, contractor, or partner / Duties

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WHO YOU PAY OUTSIDE THE BUSINESS

List anyone you pay who is not part of your daily operations but supports the business: accountant, bookkeeper, attorney, marketing help, IT, freelancers, etc.

Name or firm / What they do for you / How often you use them

WHAT INFORMATION YOU CURRENTLY HAVE ACCESS TO

For each item below, check whether you have it, you have it but don't use it, or you don't have it. If you don't have it, write down why in the notes column.

- ☐ Bookkeeping reports (P&L, balance sheet):
  Have it / Have it but don't use it / Don't have it
  Notes:

- ☐ Business bank account separate from personal:
  Yes / No
  Notes:

- ☐ Point of sale or invoicing system:
  What system:
  Notes:

- ☐ Marketing analytics (website traffic, email, social):
  Have it / Have it but don't use it / Don't have it
  Notes:

- ☐ Google Business profile, claimed and active:
  Yes / No / Don't have one
  Notes:

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- ☐ Social media accounts, active:
  Yes / No
  Which platforms:
  Notes:

THE REAL STUFF

These are the questions most people skip. Don't skip them.

What made you start this business:

What does success look like for you personally, not just for the business:

What's the one thing about the business that keeps you up at night:

What's the one thing about the business you're most proud of:

If you could change one thing immediately, what would it be:

Is there anything about your situation I should know before we meet that you'd rather say here than in the room:

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