PromptPress

CLIENT INTAKE CHECKLIST

Start every new client conversation with clarity.

Use this one-page checklist to prepare a focused intake and a confident next step.

1. THE OUTCOME

[ ] What result does the client want?

[ ] Why does it matter now?

[ ] How will they know the work succeeded?

2. THE CONTEXT

[ ] What has already been tried?

[ ] Who is involved in the decision?

[ ] What tools, materials, or access are available?

3. THE GUARDRAILS

[ ] What are the budget and timing expectations?

[ ] Are there brand, legal, or approval requirements?

[ ] What could slow the work down?

4. THE NEXT STEP

[ ] Confirm the recommended scope or next conversation.

[ ] Share one clear owner, due date, and follow-up action.

[ ] Send a short recap while the details are fresh.