

— CLIENT INTAKE

Before we touch the operation.

Enough context to start intelligently.
Not a 40-page homework assignment.

A short intake to understand the business, the operating pain and what success should look like. Short answers are fine. Rough ranges are fine.

01 Company

Company name + website

Who are we looking at?

Annual revenue range

A range is enough.

Team size

Full-time + key contractors.

Primary channels

Mark all that apply.

- | | |
|---------------------------------|------------------------------------|
| ☐ DTC | ☐ Amazon |
| ☐ Retail | ☐ Wholesale |
| ☐ Other | <hr/> |

02 What's going on?

IN YOUR WORDS

What prompted you to reach out now?

What feels most broken?

What problem keeps coming back?

Where are you personally spending time that you should not still be spending?

03 Operating areas

MARK ALL THAT APPLY

☐ Inventory / forecasting	☐ Manufacturing / vendors	☐ Supply chain
☐ 3PL / fulfillment	☐ Freight / shipping cost	☐ ERP / systems
☐ Amazon	☐ Ecommerce	☐ Retail / EDI
☐ Team / accountability	☐ Product development	☐ Other _____

04 Impact + urgency

What is this problem costing you?

☐ Time	☐ Cash	☐ Margin	☐ Customers
☐ Growth	☐ Team capacity	☐ Unknown	

How urgent is it?

01	02	03	04
☐ Annoying but manageable	☐ Creating real drag	☐ Becoming expensive	☐ Needs to be fixed now

What would happen if nothing changed for 6 months?

05 Current setup

ERP / inventory system

Fulfillment partner / 3PL

Who owns operations internally?

What reporting do you trust?

What data do you **not** trust?

06 Success + readiness

If this works, what should be different 90 days from now?

What would make you say, “That was worth it”?

Can you provide relevant operating data and system access?

☐ Yes ☐ No ☐ Depends

Can key team members participate in short interviews?

☐ Yes ☐ No

Is leadership prepared to change the operation if the evidence supports it?

☐ Yes ☐ No

— LAST QUESTION

What am I not asking that I should know?

[illegible]