BUILDER TOOLKIT

Client intake questions

The discovery questions to ask before you quote or build for someone.

Use it: On a first call with a client, a nonprofit or your own boss.

The problem

What are you trying to fix or achieve?

e.g. In their words

How do you handle it today?

What does it cost you (time, money, missed chances)?

Users and success

Who will use it, and on what devices?

What does success look like in numbers?

What have you tried before?

Practicalities

Deadline, and why that date?

Budget range

Who decides, and who pays?

Existing accounts (domain, hosting, email, payments)

e.g. Make sure they own them

Content they'll provide (text, photos, logos) and when

Fill it in with AI

Here are my notes from a client call: [paste notes]. Summarise them as: the client's goal in their words, current process, success measure, users, deadline, budget, decision-maker, and open questions. Then draft a short 'here's what I heard' email for me to edit and send.

https://digitalbuilders757.com/university/study/toolkit/client-intake