

INSTRUCTIONS: Complete all applicable fields before your first client meeting or project kickoff. Use this summary as a quick-reference guide for your team. Leave non-applicable fields blank or mark N/A.

01 | CLIENT INFORMATION

Client / Customer Name: First & Last Name **Company / Organization:** Business or Org Name (if applicable)
Industry / Sector: e.g., Retail, Healthcare, Nonprofit **Date Completed:** MM / DD / YYYY

02 | KEY CONTACT INFORMATION

Primary Contact Name: Full Name & Title **Phone Number:** () -
Email Address: email@domain.com **Preferred Contact Method:** Phone / Email / Text / Other
Secondary Contact (if any): Name & Role **Secondary Email / Phone:** _____

03 | PROJECT / SERVICE DETAILS

Service / Project Type: e.g., IT Consulting, Marketing, Design **Project Name / Reference #:** _____
Project Scope / Services Requested: Briefly describe the work to be performed
Key Requirements / Deliverables: List specific outcomes, deliverables, or expectations
Special Instructions or Constraints: Access needs, compliance requirements, preferences

04 | IMPORTANT DATES & BUDGET

Project Start Date: MM/DD/YYYY **Target Completion:** MM/DD/YYYY **Key Deadline(s):** MM/DD/YYYY
Agreed Budget / Pricing: \$ _____ **Payment Terms / Schedule:** e.g., 50% upfront, net-30, monthly

05 | RISKS, CONCERNS & SPECIAL NOTES

Known Risks or Concerns: e.g., tight timeline, budget constraints, key dependencies
Special Notes / Client Preferences: Communication style, sensitivities, or other context

06 | DOCUMENTS RECEIVED / MISSING

Signed Agreement / Contract Scope of Work (SOW) NDA / Confidentiality Form
 Payment / Deposit Received Brand Assets / Files Access Credentials Provided
Outstanding / Missing Documents: List any items still needed before work begins

07 | NEXT STEPS & TEAM ASSIGNMENT

Assigned Team Member / Lead: Name & Role **Internal Review Date:** MM/DD/YYYY
Immediate Next Steps: List 2–3 actions to take within 24–48 hours of onboarding
Notes for Internal Team: Context or instructions for the team handling this project

For more workflow tools and operational resources, visit www.prevailtechconsulting.com