Agile Edge Playbooks – Client Intake Form

Section 1: Contact Information

- Name:
- Email:
- Phone Number:
- Company Name:
- Website (if any):
- Preferred Method of Contact: [ ] Email [ ] Phone [ ] Text

Section 2: Business Overview

- 1. Briefly describe your business and target market:
- 2. What stage is your business currently in?
-     - [ ] Idea/Concept
-     - [ ] Startup (<2 years)
-     - [ ] Growth Phase
-     - [ ] Mature/Established
- 3. What are your top 3 business priorities in the next 90 days?

Section 3: Project Goals

- 4. What specific project or outcome do you want a playbook for?
- 5. What is your desired completion timeline?
- 6. What challenges or blockers are you currently facing?

Section 4: Operations Snapshot

- 7. How many team members will be involved in execution?
- 8. What tools or platforms are you currently using (e.g., Slack, Trello, EHRs, CRMs)?
- 9. Any compliance or regulatory considerations (HIPAA, ISO, etc.)?

Section 5: Playbook Preferences

- 10. Do you want your playbook to include:
-     - [ ] Roadmap
-     - [ ] Sprints
-     - [ ] Agile Roles and RACI Matrix
-     - [ ] Workflow Templates
-     - [ ] Metrics/KPIs
-     - [ ] Automation Ideas
- 11. Deliverable Format Preference:
-     - [ ] Notion
-     - [ ] PDF
-     - [ ] Both

Section 6: Add-Ons (Optional)

- 12. Interested in:
-     - [ ] AI Workflow Integration
-     - [ ] Process Automation Consulting
-     - [ ] Follow-up Optimization Session
-     - [ ] Branding + Website Planning

Additional Notes or Requests

- Leave any additional details that will help us customize your playbook.