Client Intake — {{business_name}}

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Snapshot

- **Business name:** {{business_name}}
- **Service category:** {{service_category}}
- **Years in business:** {{years_in_business}}
- **Team size (FT + contractors):** {{team_size}}
- **Primary revenue model:** {{revenue_model}}
- **Last 12-month revenue:** {{revenue_band}}
- **How they found us:** {{found_us}}

Goals

What problem is keeping you up at night right now? {{biggest_problem}}

If one thing could change in 90 days, what would it be? {{one_thing_90d}}

What outcomes do you most want from this engagement? {{outcomes_wanted}}

Logistics

- **Preferred contact:** {{contact_preference}}
- **Time zone:** {{timezone}}
- **Sessions per month:** {{sessions_per_month}}