Client Intake — Test LLC

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Snapshot

- **Business name:** Test LLC
- **Service category:** other
- **Years in business:** 2
- **Team size (FT + contractors):** 2
- **Primary revenue model:** retainer
- **Last 12-month revenue:** 100k_250k
- **How they found us:** {{found_us}}

Goals

What problem is keeping you up at night right now? crm

If one thing could change in 90 days, what would it be? organized customer database

What outcomes do you most want from this engagement? same

Logistics

- **Preferred contact:** phone
- **Time zone:** mountain
- **Sessions per month:** 0