

PROJECT INTAKE QUESTIONNAIRE

This questionnaire is provided by Clientish as a free, editable starting point. Keep the 10–15 questions that matter for your service and delete the rest, add your branding, and send it to every new client before you scope their project. The answers feed straight into your proposal and Statement of Work.

Prepared for: [Client / Company name] | **Date sent:** [Date] | **Return by:** [Date]

A short note to the client: these questions help us scope your project accurately and price it fairly. Most take a sentence or two. The more complete your answers, the better the proposal we can put in front of you.

1. Contact and Basics

Question	Your answer
Primary contact name and role	[]
Email and phone	[]
Preferred way to communicate	[email / call / portal / chat]
Time zone and working hours	[]
Is the primary contact also the final approver?	[Yes / No — if no, who is?]

2. Business and Background

Question	Your answer
In one or two sentences, what does your business do?	[]
Who are your customers / target audience?	[]
Who are your main competitors?	[]
How do you want to be positioned against them?	[]

3. Goals and Success Metrics

Question	Your answer
What is the main goal of this project?	[]
How will you know this project has succeeded? (the metric you are measuring)	[e.g. qualified leads, sign-ups, revenue, ranking]

Any secondary goals?	[]
What has been tried before, and how did it go?	[]

4. Project Scope and Deliverables

Question	Your answer
What specific deliverables or outcomes do you expect?	[]
What are the absolute must-haves?	[]
Is there anything explicitly out of scope / not wanted?	[]
Are there examples of work you like (or dislike)?	[links]

5. Budget and Timeline

Question	Your answer
What budget range are you working with for this project?	[range]
Is the budget fixed, or flexible for the right scope?	[]
Do you have a hard deadline or launch date?	[date]
What is driving that date (event, campaign, season)?	[]

6. Decision-Making and Approvals

Question	Your answer
Who gives final sign-off on the work?	[name + role]
Who else needs to approve along the way?	[]
How is feedback given (one voice, or several)?	[]
What is your typical turnaround on approvals?	[e.g. 2–3 business days]

7. Access, Assets, and Logistics

Question	Your answer
What do you already have ready (brand	[list + links]

guidelines, logo, content, photos)?	
What still needs to be created or written?	[]
What platforms / accounts will the work need access to?	[]
How do you prefer to share credentials and files?	[]

8. Wrap-Up

Question	Your answer
When would you like to start?	[date]
Any concerns or risks you want us to know about?	[]
How did you hear about us?	[]
Is there anything we have not asked that we should know?	[]

Thank you. We will use these answers to put together a proposal and a Statement of Work scoped to exactly what you need. Once we are working together, Clientish gives you a branded portal on our subdomain where you can see invoices, approve work, and open a support ticket in one place instead of over email. Learn more at the Clientish site.