Client intake form templates

Three ready-to-copy intake forms from ProWorkflow. Each lists the questions to ask, the field type to use and the automation to add in the ProWorkflow Custom Form Builder (Settings > Custom Form Builder).

1. Creative brief

For design and branding agencies: logos, brand identity, print and campaign creative.

Question	Field type	Automation in ProWorkflow
Your name, company and email	Contact details	Creates the client contact on the project
What type of project is this?	Single choice: Brand identity, Print, Campaign, Other	Attach the matching project template
What is the goal of this work?	Long text	Becomes the project description
Who is the audience?	Long text	-
Do you have existing brand guidelines?	Yes / No	Yes: show a file upload for guidelines and logos
Upload logos, guidelines or reference files	File upload, multiple files	Files attach to the project
When do you need it by?	Date, at least 10 days from today, weekdays only	Sets the project due date
What is your budget?	Number with $ prefix	Over $50,000: set High priority
How many rounds of revisions do you expect?	Dropdown: 1, 2, 3+	-

2. Website brief

For web studios and digital agencies: new sites, redesigns and landing pages.

Question	Field type	Automation in ProWorkflow
Your name, company and email	Contact details	Creates the client contact on the project
Is this a new site or a redesign?	Single choice	Redesign: show "Current website URL"
Current website URL	URL, hidden by default	-
How many pages do you expect?	Dropdown: 1-5, 6-15, 16-40, 40+	Larger sites: assign a senior project manager
Which features do you need?	Multiple choice: e-commerce, bookings, blog, forms, integrations	-
Who will write and supply the content?	Single choice: We will, You will, Mix	-
Upload a sitemap, copy or examples you like	File upload, multiple files	Files attach to the project
Launch date	Date, at least 30 days from today	Sets the project due date
Budget range	Dropdown	Sets the project category or priority

3. Consulting scope

For consultancies and professional services: advisory, audits and strategy work.

Question	Field type	Automation in ProWorkflow
Your name, organisation and role	Contact details	Creates the client contact on the project

Question	Field type	Automation in ProWorkflow
What problem do you want to solve?	Long text	Becomes the project description
What does success look like in six months?	Long text	-
Which service are you interested in?	Single choice: Strategy, Operations, Finance, Technology	Assigns the right manager and team
Who are the key stakeholders?	Long text	-
Is there a hard deadline or board date?	Date, optional	Sets the project due date
What budget have you set aside?	Number with $ prefix	Set High priority over your threshold
Upload any reports, data or previous work	File upload, multiple files	Files attach to the project
How did you hear about us?	Dropdown	Tags the project with the lead source

Build these in ProWorkflow: proworkflow.com/client-intake-process/