

# Sample Intake Workflow Template

## Step 1: Initial Contact

- Client reaches out via:
  - Email
  - Phone
  - Website form
  - Walk-in
- Record the date and the staff member who received the inquiry.

## Step 2: Intake Form Completion

- Collect client details:
  - Name, contact info
  - Business/organization (if applicable)
  - Type of service or product requested
- Confirm preferred communication method.

## Step 3: Clarify Needs

- Schedule a meeting/call to discuss the project.
- Ask clarifying questions (budget, timeline, style preferences).
- Note any special requests.

## Step 4: Internal Review

- Assign staff/student team to the project.
- Check availability of resources (materials, tools, schedule).
- Identify potential challenges.

## Step 5: Proposal/Estimate

- Draft and share the proposal with the client.
  - Scope of work
  - Estimated timeline
  - Pricing (if applicable)
- Gather client approval or requested changes.

## Step 6: Confirmation

- Finalize agreement in writing.
- Set deadlines and milestones.
- Add project to tracking system/calendar.

## Step 7: Handoff to Production/Design

- Share approved intake details with the assigned team.
- Confirm who is responsible for updates and client communication.

## Step 8: Follow-Up

- Send a thank-you note/confirmation.
- Schedule progress check-in.
- Record intake completion date.