

Client Intake & Brief Form

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Use one form per new client or project. Fill in every section before quoting - it prevents scope creep later.

Client background

- What does the business do?
- Who are its main competitors?
- What has / has not worked before?

Approval & sign-off

Tip: send this form before your first paid hour. If a client cannot answer the goal and scope sections, the project is not ready to start.

Client name	[Full name]
Business / brand	[Business name]
Email	[Email address]
Phone / WhatsApp	[Number]
Project title	[e.g. Logo redesign / Website copy]
Project type	[Design / Writing / Development / Marketing / Other: ____]
Project goal (one sentence)	[What success looks like]
Target audience	[Who is this for?]
Scope - included	[List every deliverable, e.g. 3 logo concepts, 1 revision round]
Scope - NOT included	[List exclusions, e.g. printing, photography]
Budget range	[Client budget or your quoted fee]
Deadline / launch date	[Date]
Start date	[Date]
Reference / inspiration links	[Links]
Brand assets provided	[Logo, fonts, colours, logins: ____]
Revision rounds included	[Number]
Preferred contact method	[Email / WhatsApp / Call]
Payment terms agreed	[Deposit %, balance on delivery]
Client signature	_____ Date: _____
Freelancer signature	_____ Date: _____