



"Quality Strategies. Scalable Solutions. Sustainable Success"

## Pilot Diagnostic Intake Form

### Organization Information

Organization Name: \_\_\_\_\_

Organization Address: \_\_\_\_\_

Primary Contact Name: \_\_\_\_\_

Primary Contact Title/Role: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Primary Phone Number: \_\_\_\_\_

Secondary Contact Name (Optional): \_\_\_\_\_

Secondary Contact Title/Role: \_\_\_\_\_

Secondary Email (Optional): \_\_\_\_\_

### Project Details

Project Name/Title: \_\_\_\_\_

Brief Project Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estimated Time to Complete (Max 7 hours): ☐ 2 hrs. ☐ 3 hrs. ☐ 4 hrs. ☐ 5 hrs. ☐ 5 hrs. ☐ 5 hrs.

Preferred Format(s) of Deliverable (PPT, WORD, CSV, EXL, etc.):

Desired Start Date:

Desired Completion Date:

Is this request tied to a critical external deadline? ☐ Yes ☐ No

External deadline (if applicable):



## Pilot Diagnostic Intake Form

### PD Intake Form Agreement Terms

**By submitting this form, I agree and understand that:**

- This is a one-time, complimentary engagement for a project deliverable requiring no more than 7 hours to complete the project as outlined.
- APIQ Consulting will assess the scope of work and desired TAT alignment during a complimentary Pilot Diagnostic (PD) 30-minute consultation.
- Acceptance of the project by APIQ will be provided in writing within 2-3 business days of PD consultation.
- Approved APIQ PD Projects will include:
  - One additional complimentary 30-minute call to address any final questions or changes before the outlined project start date
  - One project update email from APIQ will be sent to you or your organization's dedicated project contact, within 5-7 business days of the agreed-upon project due date.
  - Email/Client portal screenshots and/or read-only encrypted access to the final project with finalized PD Intake Form with Addendum of any agreed-upon edits since initial submission, along with the APIQ PD Testimonial Form, on the agreed-upon PD Project due date
- If satisfied, PD Project Client will return PD Testimonial Form for use on all APIQ Consulting and SM sites
- Within one business day of receipt of the APIQ PD Testimonial Form, APIQ will send the Client a full access file to the PD Project deliverable as outlined.

### Additional Mission Critical Project Details

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### Schedule Your Review Call

**Please select a PD Project Review Call date at least five business days from the date of your form submission to provide adequate time for advanced review.**

**To book your 30-minute Diagnostic Project Review Call, please click below:**

[Pilot Diagnostic Project Review Call](#)