

# Logical Source Consulting – Client Intake & Business Assessment Form

Please complete this form to help us understand your business needs. Get Advice. Get Resources. Get What Makes Sense.

## SECTION 1: Contact Information

Full Name: \_\_\_\_\_

Business Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

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

Business Website: \_\_\_\_\_

Preferred Contact Method (Email / Phone / Text / Virtual): \_\_\_\_\_

## SECTION 2: Business Overview

Business Type (Startup / Existing / Planning to Start / Nonprofit): \_\_\_\_\_

Industry: \_\_\_\_\_

Business Goals for the Next 12 Months:

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## SECTION 3: Current Challenges

Check all that apply:

- Business model clarity ■ Workflow issues ■ Organizational structure
- Low sales/revenue ■ Poor marketing ■ Scaling challenges
- Leadership needs ■ Change management

Describe your biggest challenge:

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## SECTION 4: Services of Interest

- Business Model Development ■ Operations Improvement

- Organizational Structure ■ Strategic Planning
- Marketing & Sales Strategy ■ Change Management
- Leadership Development ■ Guidance Needed

## **SECTION 5: Current Business Systems**

Do you have documented SOPs? (Yes / No / Partially): \_\_\_\_\_

Sales or Marketing Strategy? (Yes / No / Needs Improvement): \_\_\_\_\_

Tools / Software Used: \_\_\_\_\_

## **SECTION 6: Readiness & Investment**

Readiness (Immediate / 30 Days / Exploring): \_\_\_\_\_

Preferred Pricing (Project / Hourly / Retainer / Unsure): \_\_\_\_\_

Estimated Budget (<1k / 1-3k / 3-6k / 6k+ / Unsure): \_\_\_\_\_

## **SECTION 7: Additional Notes**

Additional information: \_\_\_\_\_

## **SECTION 8: How Did You Hear About Us?**

- Website ■ Social Media ■ Referral ■ Event/Workshop ■ Other

Thank you for completing this form. Logical Source Consulting – Where Advice Makes Sense.