Everborn Productions

INTAKE PACKET · ANY INDUSTRY

What does your business do twice?

That question is the whole build. This packet is how we find the answer for your business – before anyone quotes you anything.

Roughly twenty minutes. Answer what you know and leave the rest – the gaps are useful information too. Save as PDF and send it back, and we schedule week one.

Prepared for a business we have not built in yet – which has never been the constraint.

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1. The business

Business name

Owner / main contact

Email

Phone

In one sentence, what does the business actually do?

Years in business

People on payroll

Who handles admin today

Which of these describes you? Tick all that apply.

- ☐ We sell a service, not a product
- ☐ We work off appointments
- ☐ Customers pay monthly
- ☐ We depend on referral partners
- ☐ We sell a product
- ☐ We work off jobs or projects
- ☐ Customers pay once, then come back
- ☐ Our trade is licensed or regulated

2. What you already run on

Whatever is listed here stays your system of record. We connect to it – we do not replace it and we do not ask you to migrate.

CRM or client database

Where the money is tracked

Calendar / scheduling

Phone and texting

Email platform

Anything industry-specific

3. The repeat-work inventory -- the important one

Every task somebody on your team does more than once. Chasing a document. Retyping the same email. Building the same report. Reminding a customer. Rough guesses are fine – the ranking matters more than the arithmetic.

THE TASK	WHO DOES IT	HOW OFTEN	HRS / WEEK

If you only fill out one page, make it this one. This table is what the build gets priced and sequenced from. Nothing here is a commitment – it is a map of where the hours go.

4. Where it leaks, and what winning looks like

Where do customers or deals most often go quiet on you?

What gets done late, or not at all, when the week gets busy?

If one thing were handled without you, what would it be?

Rules your industry puts on how you communicate: required disclosures, claims you are not allowed to make, consent or privacy rules, licensing language. If any apply, they get built into the templates in week one rather than left to whoever is typing.

WHEN YOU ARE DONE

STEP 1
Fill out what you can

STEP 2
Save it as a PDF

STEP 3
Send it back from the box at the bottom of the website

THEN
We schedule week one

If there isn't enough repeat work to justify a build, we will tell you that instead of selling you one.