

AI BUSINESS ASSESSMENT

Client Intake Form

IntelliTech Dynamics

CONFIDENTIALITY NOTICE

The information collected in this form is strictly confidential and will be used solely for the purpose of conducting an AI business assessment for the client named below. This form and its contents shall not be shared with any third party without the express written consent of the client. IntelliTech Dynamics maintains appropriate technical and organizational safeguards to protect all client information.

1. CLIENT INFORMATION

Company Name:

Primary Contact Name:

Job Title:

Email Address:

Phone Number:

Website URL:

Business Address:

City:

State:

ZIP:

Country:

Industry Type / Sector:

Years in Business:

Number of Employees:

Number of Locations:

2. BUSINESS OVERVIEW

Provide a brief description of the business:

Main products or services offered:

Target customers / primary market:

Primary revenue drivers:

Biggest business goals for the next 12 months:

3. CURRENT OPERATIONAL CHALLENGES

Please be as specific as possible. This information helps identify the highest-value automation opportunities for your business.

What are the biggest time-consuming tasks in the business?

What tasks are primarily repetitive or manual in nature?

Where do delays or bottlenecks typically occur in your workflows?

What tasks most frequently result in errors, rework, or corrections?

What tasks are most frustrating for your team?

Which processes rely heavily on email, spreadsheets, documents, or manual data entry?

4. TECHNOLOGY STACK

What software tools and platforms are currently in use (list all)?

Which tools are essential / mission-critical to daily operations?

Which tools are underused or rarely accessed?

Which tools do not integrate well with each other?

Are any AI tools currently in use? If yes, please describe:

Have automation tools been attempted previously?

- ☐ Yes
- ☐ No
- ☐ Currently in progress

If yes: what worked well and what did not?

5. DATA, SECURITY & COMPLIANCE

What types of data does the business handle? (e.g., customer personal identifiable information, financial records, health data)

Are there applicable privacy, security, or compliance requirements? (e.g., HIPAA, PCI-DSS, SOC 2, GDPR)

Are there any tools or platforms the organization is not permitted to use?

Are there existing internal policies related to AI, automation, or data security?

- ☐ Yes — please attach or describe below
- ☐ No
- ☐ In development

6. RETURN ON INVESTMENT GOALS

What outcome matters most to the organization? (Select up to 2 options below of the most important)

- ☐ Time savings / efficiency
- ☐ Cost reduction
- ☐ Revenue growth
- ☐ Error reduction / improved accuracy
- ☐ Improved customer experience
- ☐ Employee satisfaction

What would make this project a clear success for your organization?

7. PROJECT SCOPE & PREFERRED TIMELINE

What services are you interested in? (Select all that apply)

- ☐ AI Business Assessment only (review and recommendations report)
- ☐ Assessment plus ongoing consulting and optimization
- ☐ Assessment plus additional customized automation tools to improve inefficiencies
- ☐ Other — please specify:

Preferred project start date:

Target Start Date:

Any additional context, concerns, or questions?

8. AUTHORIZATION & CONSENT

Client Acknowledgments

- ☐ I authorize Intellitech Dynamics to review our business workflows, processes, and internal documentation as necessary to conduct the AI business assessment.
- ☐ I consent to IntelliTech Dynamics contacting relevant team members for interviews or workflow observations as part of the assessment process if necessary.
- ☐ I understand that all findings and recommendations will be presented in a written report and that actual results may vary from any estimates provided.
- ☐ I acknowledge that this form is confidential and that my information will be used solely for the purposes of this engagement.

By signing below, the authorized representative confirms that the information provided in this form is accurate to the best of their knowledge and authorizes IntelliTech Dynamics to proceed with the AI business assessment engagement.

Client Authorized SignatureDate

Printed NameJob Title

Company Name

— Thank you for completing this form. A member of our team will follow up within 1–2 business days. —