

Client Intake Form

Template by briefgate.dev

1. CONTACT

Client / business name

Primary contact name & role

Email address

Phone number (optional)

2. PROJECT BASICS

Project type *(website / brand identity / marketing / app / other)*

Existing site or brand? If yes, link

What's driving this project now?

3. GOALS

What should this achieve in the first few months?

Who is this for (target audience)?

What would make this a failure, even if it looks great?

4. CONTENT AND MATERIALS

Logo *(attach file — SVG or large PNG, not a screenshot)*

Brand colors *(hex codes, or a photo to sample from)*

Key copy / messaging *(headline, about paragraph, pricing/legal text)*

Photos or other assets *(attach — state minimum count/resolution)*

5. ACCESS

Do not write passwords or logins in this document. Request credentials through a one-time secure link instead — see briefgate.dev/docs/secrets.

Existing site or hosting login needed? *(yes/no — collect separately)*

Domain registrar access needed? *(yes/no — collect separately)*

Third-party accounts to connect *(analytics, email, social)*

6. TIMELINE AND BUDGET

Hard deadline, if any

Budget range

Who has final sign-off