CLIENT OPERATIONS

Client intake questionnaire

A practical intake worksheet for learning the goals, context, access needs, and working preferences behind a client engagement.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You need better inputs before scoping or starting an engagement.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Define the business goal**
- [ ] 02 **List the audience and stakeholders**
- [ ] 03 **Capture success measures**
- [ ] 04 **Request required access**
- [ ] 05 **Ask about voice and constraints**
- [ ] 06 **Confirm communication preferences**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.