

CLIENT ONBOARDING FORM

Client Name: Evergrowth Ventures

Date Submitted: March 3, 2025

Project Scope: AI-driven document summarization workflow and Slack notifications for internal case routing.

Key Contact: Jane Doe, Head of Ops

Contract Length: 6 months

Data Source: Google Drive (PDF uploads)

Additional Notes:

The client requests GDPR-compliant handling of document summaries and audit trails stored in Airtable.