



# DTB CLIENT INTAKE & SCOPE FORM (v3.1)

**Designed To Breakthrough LLC** • inquire@dtbsolutions.tech • (570) 801-9234  
*Empowering small businesses with scalable, intelligent, and human-centered technology.*

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## 1. CLIENT & BUSINESS DETAILS

<u>Field</u>	<u>Response</u>
Client Name	<hr/>
Company / Brand Name	<hr/>
Industry / Niche	<hr/>
Website / Social Handles	<hr/>
Primary Contact (Email + Phone)	<hr/>
Preferred Communication	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text <input type="checkbox"/> Video Call
Business Type	<input type="checkbox"/> E-commerce <input type="checkbox"/> Brick-and-Mortar <input type="checkbox"/> Service-based <input type="checkbox"/> Nonprofit <input type="checkbox"/> Other
Proposed Project Dates	Initiation Date: <hr/>
( Initiation/Completion )	Completion Date: <hr/>

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## 2. PROJECT CATEGORY

*(Select all that apply.)*

- ☐ **Web Services** — Websites, brand systems, SEO
  - ☐ **Agentic / AI Systems** — Chatbots, workflow automation, analytics
  - ☐ **Marketing & Growth** — Socials, content, ad campaigns
  - ☐ **Consulting / Partnerships** — Fractional CTO, strategy, white-label
  - ☐ **Local Tech Setup** — POS, security, systems integration
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## 3. PROJECT OVERVIEW

**Describe your vision / goals in one sentence:**

*What problem are we solving or what breakthrough do you want to create?*

**Main objectives (check all that apply):**

- ☐ Generate leads   ☐ Sell products   ☐ Showcase brand   ☐ Automate workflow
- ☐ Educate / inform   ☐ Improve internal process   ☐ Enhance customer experience

**Target audience (age range, location, behavior):**

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## 4. BRANDING & CONTENT

<u>Question</u>	<u>Response / Checkbox</u>
Do you have a logo + color palette?	<input type="checkbox"/> Yes (provide link/folder) <input type="checkbox"/> Need brand kit
Written content available?	<input type="checkbox"/> Yes (client copy) <input type="checkbox"/> Need DTB copywriting
Visual assets (photo / video)?	<input type="checkbox"/> Have library <input type="checkbox"/> Need sourcing

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## 5. TECHNICAL & INTEGRATION DETAILS

<u>Area</u>	<u>Response / Checkbox</u>
Integrations / Tools	<input type="checkbox"/> CRM <input type="checkbox"/> Email automation <input type="checkbox"/> Payment gateway <input type="checkbox"/> Booking <input type="checkbox"/> Blog <input type="checkbox"/> Analytics
Existing hosting / domain	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Needs configuration
Compliance needs	<input type="checkbox"/> Standard <input type="checkbox"/> Custom (describe)

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## 6. SCOPE & BUDGET

Each project begins with a discovery consultation to determine the best-fit service package.

Service Category	Includes	Range / Starting Cost	Duration
Web Services	3–10 page builds, SEO, CMS, analytics, automation-ready	\$600–\$2,500+	~7–22 days
Agentic / AI Systems	Custom chatbots, vector search, dashboards, workflow automations	\$800–\$4,000+	~10–25 days
Marketing & Growth	Socials, content creation, campaign strategy, ads, analytics	\$400–\$1,500/mo	Ongoing
Consulting & Partnerships	Fractional CTO, process optimization, white-label dev, strategy	\$300–\$3,000/mo	1–3+ months
Local Tech Setup	POS, networking, security, CRM + system integrations	\$400–\$2,000+	Project-based

**Add-Ons:**

☐ Maintenance (\$75/mo)   ☐ Copywriting (\$200)   ☐ Photo Optimization (\$50)   ☐ Domain & Hosting Setup (\$150)

**Budget range:** ☐ Under \$1K   ☐ \$1K–\$2.5K   ☐ \$3K+   ☐ Ongoing retainer  
**Maintenance after launch?** ☐ Yes ☐ No ☐ Undecided

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## 7. DELIVERABLES & TIMELINE

<u>Phase</u>	<u>Deliverables</u>	<u>Est. Duration</u>
Discovery & Planning	Brand + goal mapping, content collection	2–3 days
Design Approval	Homepage mockups / feature flow	4 days
Development	Full build + integrations	10 days
Review & Optimization	SEO tuning, testing, revisions	4 days
Launch & Training	Deployment + walkthrough	1 day

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## 8. SUCCESS METRICS

- ☐ Time savings   ☐ Lead growth   ☐ Revenue increase   ☐ Reduced manual work  
☐ Improved UX   ☐ Analytics / visibility   ☐ Customer satisfaction

*List 2–3 measurable KPIs DTB should track (e.g., 25% increase in leads, 50% faster response time).*

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## 9. APPROVALS, ACCESS & TEAM

- Primary decision-maker: \_\_\_\_\_
- Key reviewers: \_\_\_\_\_
- Required access (domains, CRM, socials, etc.): \_\_\_\_\_

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## 10. NOTES & PRIORITIES

Top 3 must-haves for this project:

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

Additional comments / deadlines: \_\_\_\_\_

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## 11. PAYMENT OVERVIEW

- **Deposit:** 50% due at signing (non-refundable).
- **Milestones:** Per proposal.
- **Final:** Due before transfer of credentials.
- **Accepted Payments:** Zelle, CashApp, Venmo, PayPal → (570) 801-9234
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## 12. AUTHORIZATION & ACCEPTANCE

By signing below, Client authorizes **Designed To Breakthrough LLC** to begin discovery, design, and scoping activities.

This document serves as **Exhibit A: Scope of Work & Deliverables** under the DTB Client Services Agreement.

**Client Signature** \_\_\_\_\_

**Name / Title** \_\_\_\_\_

**Date** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**DTB Representative** Sage Nwanne — Lead Designer

**Signature / Date** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Notary (Opt.)** \_\_\_\_\_