**Client Intake Form for ECFData Services**

**1. Contact Information**

* **Full Name: Sarah Johnson**
* **Company Name: InnovateTech Solutions**
* **Job Title: Chief Technology Officer**
* **Email Address:** [**sarah.johnson@innovatech.com**](mailto:sarah.johnson@innovatech.com)
* **Phone Number: +1 555-123-4567**
* **Preferred Contact Method: Email**

**2. Company Details**

* **Industry: IT Services**
* **Company Size: 51-200 employees**
* **Website URL:** [**www.innovatech.com**](http://www.innovatech.com/)
* **Current Technology Stack: Azure Cloud, .NET, React, SQL Server**

**3. Project Requirements**

* **Please describe the main business challenge you want to address:  
  We’re looking to optimize our cloud infrastructure and integrate AI-driven analytics into our existing systems to improve operational efficiency.**
* **Type of service you're interested in:**
  + **Cloud Solutions**
  + **Cybersecurity**
  + **Software Development**
  + **AI & Analytics**
  + **Other (please specify):**
* **Project timeline: 1-3 months**
* **Estimated budget range: $50,000-$100,000**

**4. Technical Needs**

* **Are there existing systems or integrations to consider?  
  Yes, we currently use Azure for cloud services and have an in-house ERP system.**
* **Do you require data migration or system upgrades?  
  Yes**
* **Preferred technologies or tools: Azure AI, Power BI, and Python for analytics.**

**5. Additional Information**

* **How did you hear about ECFData? Online Search**
* **Do you have any specific questions or requests for our team?  
  We’re particularly interested in solution plays like Azure Cost Optimization and Power BI dashboards with predictive modeling.**

**6. Consent & Follow-Up**

* **I consent to be contacted by ECFData regarding this inquiry.**
* **I would like to subscribe to the ECFData newsletter for updates.**

**Transcript:**

**ECFData Member: Hi Sarah, thank you for reaching out to us through our intake form! It’s great to hear that you’re exploring ways to optimize your cloud infrastructure and integrate AI-driven analytics. You mentioned Azure Cost Optimization and Power BI predictive dashboards—could you tell me more about what you envision for these?**

**Sarah Johnson: Sure! For Azure Cost Optimization, we’re looking for ways to reduce wastage from underutilized resources, like virtual machines and storage. We’re also curious if reserved instances would suit our workloads.**

**For Power BI, we’d love to have dashboards that not only show historical trends but also predict operational bottlenecks, like delays in order processing or capacity issues in our ERP system.**

**ECFData Member: Excellent points! For cost optimization, we can start by running an Azure Advisor report and implementing automated scaling rules. We’ll also evaluate reserved instances and leverage spot VMs where applicable.**

**For Power BI, we can integrate your ERP data to build custom dashboards with machine learning models for predictive analytics. We could also include alerts for key performance metrics.**

**Sarah Johnson: That sounds perfect! How long would it take to implement these solutions?**

**ECFData Member: For Azure Cost Optimization, we could deliver results in 2-3 weeks. The Power BI predictive dashboards would take around 6-8 weeks, depending on the data complexity.**

**Sarah Johnson: That’s within our timeline. Let’s proceed with scheduling a discovery session.**

**ECFData Member: Absolutely, I’ll send you an invite for Tuesday at 10 AM PST. In the meantime, I’ll share a brief proposal summarizing these solution plays.**

**Sarah Johnson: Sounds good. Thanks for the quick response!**

**ECFData Member: My pleasure, Sarah. Looking forward to working with you!**