

Mad Business Plans — Client Intake Form

SECTION 1 — Contact Information

1. Full Name:

2. Business Name (if chosen):

3. Email:

4. Phone Number:

5. Preferred Contact Method:

- **Email:**
- **Phone:**
- **Text:**

SECTION 2 — Business Concept

6. Describe your business in 2-6 sentences?

7. What problem does your business solve?

8. Who is your target customer?

SECTION 3 — Purpose of the Business Plan

9. What will this business plan be used for?

☐ **SBA Loan**

☐ **Bank Loan**

☐ **Grant**

☐ **Investor Funding**

☐ **Licensing**

☐ **Internal Planning**

☐ **Other:** _____

SECTION 4 — Business Details

10. Business Structure (LLC, Sole Prop, etc.):

11. Location / Service Area:

12. Do you have a physical property?

☐ Yes ☐ No

13. If yes, describe the property or location details:

14. Planned Opening Date:

SECTION 5 — Products & Services

15. List your main services or products:

16. Pricing (if known):

17. Future services you plan to offer:

SECTION 6 — Market & Competition

18. List your top competitors (if known):

19. What do they do well?

20. Why will customers choose you instead?

SECTION 7 — Operations

21. Hours of operation:

22. Number of employees needed:

23. Roles you plan to hire:

24. Equipment, supplies, or materials needed:

25. Vendors or suppliers (if known):

SECTION 8 — Financial Inputs

26. Estimated startup costs (if known):

27. Monthly expenses (if known):

28. Expected pricing for your services/products:

29. Expected customer volume (monthly):

30. Do you have any existing financial documents?

☐ Yes ☐ No

31. If yes, describe what you have:

SECTION 9 — Owner Background

32. Your experience in this industry:

33. Your strengths:

34. Partner's strengths (if applicable):

SECTION 10 — Branding & Vision

35. Do you have a business name?

36. Do you have a logo?

☐ **Yes** ☐ **No**

37. Describe the tone or personality you want your brand to have:

38. Long-term vision for your business:

SECTION 11 — Additional Notes

39. Anything else you want included in your business plan:
