# Project intake process: What is it exactly?

The **project intake process** is a structured approach organizations use to assess potential projects before the actual initiation.

It serves as a gatekeeping mechanism, as you want to work only on projects aligned with your company’s strategic objectives and available resources. However, well-structured intake processes also help you streamline client onboarding, so you can do your job faster and more efficiently.

**Project intake process vs. client intake process:**

The **client intake process** refers to the initial steps taken to onboard a new client. It typically involves gathering information about the client's needs and requirements to ensure a successful working relationship.   
On the other hand, the **project intake process** focuses specifically on the initiation of a new project within an organization. It means evaluating and prioritizing project requests, resource allocation, and the establishment of project objectives and scope.

## Challenges of project intake processes

**Inadequate project documentation**

Inadequate project documentation hinders your intake process by causing misunderstandings and misaligned expectations. Let’s say you failed to clarify and document project goals. In this case, the project team will struggle to develop accurate estimates.

To address this challenge, you need to properly manage project documentation. It’s best to use document templates, checklists, guidelines, and data collection tools to capture essential information consistently.

**No stakeholder involvement**

You can’t get the job done if you never get to reach all parties involved in the project. Failure to engage key stakeholders from the outset often results in delayed decision-making and resistance to project implementation.

A typical project manager will benefit from client onboarding automation. They could also determine one or two communication channels to foster collaboration, while project meetings and feedback sessions can also help kickstart the process.

**Lack of standardization**

The absence of standardized procedures is also problematic. In this case, you’ll have to approach each project differently, which leads to inefficiencies, confusion, and increased administrative overhead. That’s exactly why you should establish clear intake guidelines for all types of projects.

## Key steps of a successful intake process

Companies that fail to standardize intake processes spend much more time evaluating project proposals. If you still haven’t designed your project intake process, you can do it by following these nine steps:

**1. Project Request**

The first step in the intake process is receiving a project request. This can come from various sources like clients, stakeholders, or internal departments. At this stage, your only task is to properly document incoming project requests.

**2. Establish project selection criteria**

Once project requests start coming in, it's necessary to define project selection criteria. These criteria act as guidelines for assessing requests based on:

* Their alignment with organizational goals
* Available resources
* Strategic importance
* Potential impact
* Feasibility

The decision-making process becomes more objective and consistent if you establish selection criteria upfront.

**3. Create a standardized project intake form**

Creating a standardized project intake form is highly beneficial for those eager to streamline the intake process. This form includes relevant fields for capturing essential project details: project name, description, objectives, expected outcomes, timelines, budgetary requirements, and any other pertinent information.

A standardized project intake form ensures consistency, as you’ll capture all necessary information for each project request in a timely and efficient manner.

**4. Gather information with the best data collection tools**

Collecting information for new project requests often turns into the first serious bottleneck of the intake process. But there is a way out!

New technologies significantly improve the intake process, so why not take advantage of them to collect data and documents about project proposals? You should:

* Create customizable forms
* Automate reminders
* Centralize all project-related information in one place
* Reject or accept information or files
* Leave comments to clarify some aspects of your project intake form

Content Snare helps you streamline the intake process by reducing manual effort.

**Build project intake forms with Content Snare**

Simplify the way you capture project information with customizable forms and questionnaires — or use one of our growing number of ready-made templates.

**5. Conduct initial project reviews**

After receiving project requests, the next step in the intake process is to conduct initial project reviews. This involves evaluating each project request based on the established selection criteria (as explained in step 2).

The purpose of this review is to gain a better understanding of the project's scope, requirements, potential challenges, and overall feasibility. It also allows for an initial assessment of whether the project aligns with the goals or capacities of your organization.

**6. Prioritize projects**

The next step is to prioritize projects. This means ranking each project proposal based on its strategic importance, potential impact, urgency, and available resources. Prioritization enables you to focus on project requests with the highest value.

The goal of this step is to help you manage resource allocation more efficiently, so you can address the most critical projects first.

**7. Allocate resources**

Resource allocation is a critical stage of the project intake process because it tells you what you need to get the job done. A typical project requires these resources:

* Human resources
* Budget
* Equipment
* Technology

The project intake team needs to consider the availability of resources, so you can make informed decisions on how to prepare for the actual execution. However, resource allocation also means considering potential conflicts or dependencies between projects.

**8. Obtain approvals**

Another important phase of the project intake process is to obtain approvals from relevant stakeholders. These usually include project sponsors and department heads. This step serves multiple purposes:

* It ensures that the project is aligned with the overall organizational strategy
* It gives stakeholders the opportunity to review and provide feedback on the project
* It establishes a formal commitment to support the project

**9. Communicate project decisions**

Finally, you must communicate project decisions to all relevant parties.

This includes both the approval of selected projects and the rejection of others. Transparent communication walks the extra mile to explain the rationale behind each decision. That way, you can avoid confusion and reduce potential resistance or pushback.

**Benefits of building a solid project intake process**

Polishing your project intake process may seem daunting at first, but it’s necessary for a range of reasons. Here are just a few benefits of standardizing project intake processes:

**Streamlined communication and alignment**

A well-structured project intake process acts as a conduit for effective communication. Let us give you an example — imagine a software development team working on a new application without a solid project intake process.

With no clear understanding of the client's requirements, the team will likely end up building a product that fails to meet expectations, resulting in costly rework and strained relationships.

**Prioritization and resource allocation**

Decision-makers can only make informed choices if they define clear criteria for project selection. We are talking about factors like strategic alignment, return on investment, or resource availability.

Consider a marketing department flooded with multiple campaign ideas. With a project intake process in place, the team can assess each proposal's potential impact and allocate resources accordingly.

**Risk mitigation**

A thorough project intake form will help you identify and address potential risks early in the project lifecycle. By conducting thorough feasibility studies and risk assessments during the intake phase, organizations can proactively mitigate risks and develop effective contingency plans.

**Higher project success rates**

Improved intake processes maximize the likelihood of project success. If you set clear objectives and conduct thorough assessments before project initiation, you’ll greatly increase feasibility. In addition, this holistic approach creates a culture of achievement within the organization.

**Efficient resource utilization**

You can also optimize resource utilization by matching projects with available capacity and skill sets. The intake process prevents resource bottlenecks, so you can assign the right people to the right projects at the right time. Here’s what you get in return:

* Increased productivity
* Reduced idle time
* Efficient utilization of resources
* Streamlined client onboarding
* Cost savings
* Improved overall performance

**Continuous improvement and learning**

Formal intake processes also deliver long-term benefits. By capturing project data and lessons learned, your company can accumulate valuable knowledge for future endeavors. In addition, this knowledge repository serves as a foundation for refining the project intake process.

Over time, your organization will become more adept at selecting and executing projects.

**Improve your project intake process to streamline efficiency**

Projects come in all shapes and sizes, and that’s what makes people confused. But here’s the thing — most companies can solve intake process issues with the right data collection tool.

Content Snare improves your work by helping you design a perfect project intake form. You can use it to request project-related information, files, or documents. Your clients will see bite-size chunks instead of bulk requests, so they can give you accurate information in a timely manner.

## Project intake form: The definition

A project intake form is a well-structured questionnaire that one must use to collect information about proposed projects or initiatives. This form typically includes questions about:

* The project’s purpose
* Its scope and objectives
* Budget
* Target audience
* Timeline

You can also design a project intake form template that requests details about the resources needed, potential risks and constraints, and the expected outcomes. In each case, the idea is to gather sufficient information from your client to successfully complete the project.

**Advantages of using project intake forms**

The project intake process gets easier if you design a comprehensive form or questionnaire. Here are the most important advantages of crafting a solid project intake form template:

**1. Intake form ensures consistency**

Using a project intake form ensures consistency in your work. Instead of starting from scratch with each client, you can immediately collect important data using a project intake form. This kind of consistency makes it easier to run your different projects.

The best thing is that you can refine the form over time to make it more relevant and efficient. That way, you are guaranteed to capture all necessary information regardless of the type of job or client. You may consider creating different project intake form templates for different types of projects.

**2. No back-and-forth emails**

A big benefit of these forms or questionnaires is the elimination of back-and-forth emails. Instead of sending multiple emails to gather information, you can simply send the project intake form to the client and ask them to fill it out.

**3. It saves your time**

Using a project intake form can save you a lot of time. You can avoid delays and reduce the need for follow-up emails or calls by collecting all the necessary information upfront. This allows you to move forward with the project more quickly and efficiently.

**4. Intake forms streamline communication**

Project intake forms can also streamline communication between you and your client. By having all the necessary information in one place, you can easily refer back to it throughout the project.

This helps you avoid miscommunication and ensures that everyone is on the same page from day one. In addition, the document can serve as a reference point for any future discussions or project-related decisions.

**Questions to ask in a project intake form template**

A typical project comes with countless tasks and requirements, but you should only focus on key elements in your client intake process. We compiled a comprehensive list of questions to ask in a professional project intake form.

**Start with the basics**

The basic details tell you more about the client you’re working with. It’s a simple set of questions, but it’s mandatory for successful project management.

* What is your name?
* What is your job title and department?
* Your email address
* Your phone number
* Your company’s website URL
* What is your preferred communication method?
* What industry/niche are you in?
* What services or products do you sell?

**Define the project type**

The next step is to define the type of project you’re working on. This will help you plan resources for the proposed project.

* What type of project is this?
* What is the scope of the project?
* What is the purpose of the project?
* What is the level of complexity of the project?
* What are the technical requirements of the project?
* What are the functional requirements of the project?
* Who is your target audience?

**Determine project goals**

A questionnaire form must focus on project goals. Potential clients should answer the following questions about their objectives:

* What is the main goal of the project?
* What specific outcomes would you like to achieve with the project?
* What are the key deliverables of the project?
* How will the project benefit your business or organization?
* What pain points or challenges are you trying to address with this project?
* How does this project fit into your overall business strategy?
* Are there any external factors (such as competitors or industry trends) that have influenced your decision to pursue this project?
* How will you measure progress along the way?

**Define the budget through project requests**

Budgeting questions are a major element of project intake forms. Here are a few questions to include in your intake process:

* What is the overall budget for the project?
* Are there any constraints or limitations on the budget?
* How will the budget be allocated across the various stages of the project?
* Are there any contingencies for unforeseen expenses or changes in scope?
* How will you track and manage expenses throughout the project?
* Are there any opportunities to optimize the budget?

**Ask questions about project deadlines**

Time is a precious resource, so a sample project intake form always comes with timeline-related questions. Here are a few suggestions:

* What are the expected start and end dates for the project?
* What milestones do you expect to achieve, and when?
* What is the estimated duration for each phase of the project?
* Are there any external factors (e.g. seasonality or product launch dates) that we need to consider when setting the project timeline?
* What are the risks or challenges that could impact the timeline?
* What level of flexibility do you have with the project timeline?

## Project Intake Best Practices

Effective project intake processes are vital for organizations to prioritize, approve, and manage projects systematically. Below are some best practices for project intake to ensure that projects align with business objectives and resources:

**1. Clear Intake Criteria and Guidelines**

* **Establish Criteria:** Create clear guidelines and criteria for project requests, such as alignment with strategic goals, potential ROI, resource availability, and risk assessments.
* **Standardized Templates:** Use standardized forms or templates to ensure consistent data is captured across all project requests (e.g., business case, scope, benefits, costs, stakeholders).

**2. Centralized Intake Portal**

* **One Point of Entry:** Ensure all project requests go through a single, centralized intake portal or system. This prevents informal, ad hoc requests from bypassing the intake process.
* **Automation:** Use automation where possible for routing, approvals, and notifications. This reduces manual errors and ensures timely responses.

**3. Project Prioritization Framework**

* **Scoring Model:** Implement a scoring model based on factors such as strategic alignment, urgency, potential impact, risk, and resource availability.
* **Prioritization Matrix:** Use a prioritization matrix or ranking system to evaluate and rank projects against each other, ensuring that high-value projects receive attention.

**4. Stakeholder Engagement**

* **Involve Key Stakeholders Early:** Ensure stakeholders from across the organization are involved in the project intake process to provide input on business needs, resource capacity, and alignment.
* **Cross-functional Review Committees:** Set up cross-functional review boards or committees to evaluate project requests and align decisions with organizational priorities.

**5. Resource and Capacity Management**

* **Evaluate Resource Availability:** Assess available resources (people, budget, tools) to ensure that project intake does not overload teams. This helps avoid bottlenecks and project delays.
* **Capacity Planning:** Leverage capacity planning tools to forecast and manage demand, ensuring that project approvals align with resource availability.

**6. Governance and Accountability**

* **Defined Roles and Responsibilities:** Clearly define who is responsible for evaluating, approving, and overseeing project requests. Governance structures ensure accountability and transparency.
* **Approval Workflow:** Set up a transparent approval workflow that includes decision points, authority levels, and escalation paths for resolving conflicts.

**7. Project Feasibility and Alignment Checks**

* **Initial Feasibility Assessment:** Conduct an initial feasibility assessment to check for technical, financial, and operational viability before full approval.
* **Alignment with Strategy:** Ensure that each project aligns with the organization’s overall strategy and that it contributes to long-term goals.

**8. Feedback Loop and Iterative Improvement**

* **Continuous Feedback:** Regularly gather feedback from project sponsors, stakeholders, and delivery teams on the intake process to improve efficiency.
* **Review and Adjust:** Continuously review intake processes and make adjustments based on evolving organizational needs, emerging risks, and lessons learned from previous projects.

**9. Transparency and Communication**

* **Transparent Status Updates:** Provide clear updates to stakeholders about the status of their requests, including approval timelines, next steps, and decision rationale.
* **Regular Reporting:** Use dashboards or reports to track the intake pipeline, showing metrics such as the number of requests, approval rates, resource constraints, and project statuses.

**10. Technology Enablement**

* **Leverage Tools:** Use tools such as project management software (e.g., Asana, Jira, Monday.com, MS Project) or custom intake systems that allow for automated workflows, collaboration, and visibility into the intake process.
* **Data-Driven Decisions:** Utilize data from previous projects, resource management tools, and analytics to inform decision-making in the intake process.

By implementing these best practices, organizations can streamline their project intake process, ensuring that only high-priority, feasible projects move forward while effectively managing resources and stakeholder expectations.