

MIKE ROSEN ARCHITECTS · MRAi DESIGN STUDIO

10X10 QB Board — Client Intake

Tell us how your business actually runs. We build your board from these answers — your trackers, your accounts, your numbers — so every step on your board is a real task, not a template.

ABOUT 15 MINUTES · ANSWER IN YOUR OWN WORDS — SHORT IS FINE · SKIP NOTHING YOU CAN ANSWER

A — YOUR BUSINESS

Questions 1–9

1 Business name

2 Your name and role

3 Who else will work the board? (names + roles)

4 What you sell, in one sentence

5 Who buys it?

6 Website URL

7 Markets you serve today

8 The two markets you most want to grow

9 How the business runs today, in three lines — tools, habits, where things live

B — CONTROL

Questions 10–15

10 What tools do you use now to track work? (CRM, spreadsheets, apps)

11 Where do leads get written down today?

12 Do you have a dashboard or report you already look at?

13 What one number would tell you, daily, whether the day went well?

14 Your Top 3 priorities for the next 90 days

15 Phone and computer you will work the board from

C — WEBSITE

Questions 16–20

16 What is the one action you want a visitor to take?

17 Does your site have a working contact/booking form today? Where do its messages go?

18 Your core value statement, if you have one (or write “write it for me”)

19 The strongest visual you own (photo, rendering, product shot)

— or tell us where the files live:

ATTACH IMAGES

What makes a strong hero visual: the finished outcome, sharp and bright, people in it if you have it.

IF THE ATTACH BUTTON DOESN'T RESPOND IN YOUR VIEWER, SEND THE FILES VIA YOUR STUDIO UPLOAD LINK — AND SAVE THIS PDF AFTER ATTACHING:

20 Anything on the site you know is outdated or wrong

D — OFFER

Questions 21–26

21 List your offers/products, one per line

22 Price range for each

23 Typical delivery timeline for each

24 Your 3 key advantages over the alternatives

25 Do you have a one-page description or deck today?
— or tell us where the files live:

ATTACH THE DECK

PDF or PowerPoint — the version you would send a client.

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26 Any naming inconsistencies you know of (old names, variants)

E — OPPORTUNITIES

Questions 27–31

27 Your top 3 target accounts (names)

28 What each of them cares about most, as far as you know

29 The gap you feel most: market / capacity / offer — explain in a line

30 Materials you usually send before a meeting

31 Who owns follow-up after a meeting?

F — PIPELINE

Questions 32–37

32 Your lead sources — where leads actually come from

33 How fast do you respond to a new lead today?

34 What makes a lead qualified for you? (budget, timing, fit…)

35 How do you follow up now, and how often?

36 Typical deal value range

37 Where do conversations get logged today, if anywhere?

G — MESSAGING

Questions 38–41

38 Company statement, if one exists

39 Offer statement, if one exists

40 The three audiences you must speak to (e.g., customers / partners / investors)

41 Words or claims you must NOT use

H — VISUALS

Questions 42–45

42 Brand colors (or write “use the board palette”)

43 Current logo files — where are they?

— or tell us where the files live:

ATTACH LOGO FILES

Vector (AI, EPS, SVG or PDF) and a PNG if you have one — the originals, not screenshots.

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44 Font/typography you use

45 Imagery you own and can legally use

I — DISCIPLINE, TESTING & LOCK-IN

Questions 46–51

46 Two daily windows you can protect for focus work

47 Your weekly review day and time

48 Your biggest blocker right now

49 Your biggest recent win

50 What does success look like at 90 days?

51 Anything else we should know before we build your board?