

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**

**BEFORE YOU START — AND WHEN YOU FINISH**

Fill this form in Acrobat (the free app) so the attach buttons work — a browser viewer can't attach files. When finished: SAVE this PDF and return the SAVED copy — your answers and attachments travel with the saved file. A form filled in but not saved comes back empty.

## 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.

**ON YOUR PHONE? IN THE ACROBAT APP, ATTACH FROM THE APP'S OWN MENU (... → ATTACH FILE). IF A 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**20** Anything on the site you know is outdated or wrong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.

**ON YOUR PHONE? IN THE ACROBAT APP, ATTACH FROM THE APP'S OWN MENU (... → ATTACH FILE). IF A BUTTON DOESN'T RESPOND IN YOUR VIEWER, SEND THE FILES VIA YOUR STUDIO UPLOAD LINK — AND SAVE THIS PDF AFTER ATTACHING:**

**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.

**ON YOUR PHONE? IN THE ACROBAT APP, ATTACH FROM THE APP'S OWN MENU (... → ATTACH FILE). IF A BUTTON DOESN'T RESPOND IN YOUR VIEWER, SEND THE FILES VIA YOUR STUDIO UPLOAD LINK — AND SAVE THIS PDF AFTER ATTACHING:**

**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?

### FINISHED? SAVE YOUR FORM.

Click the button (in Acrobat), or use File → Save As.
Then return the saved copy to the Studio.

**SAVE YOUR COMPLETED FORM**