INTEGRATED SYSTEMS

VETERAN-OWNED · MERRITT ISLAND, FLORIDA · SPACE COAST

AI Project Intake Form

How to use this form

1. Fill it in on your computer (Adobe Acrobat Reader or any PDF reader), or print it and write by hand.
2. Save it, then email it to sales@integrated-sys.us.
3. Do not include passwords, account numbers, or confidential customer data. We will ask for those securely if needed.

SECTION 1 Contact information

Business name

Website

Contact name

Title / role

Email

Phone

Preferred contact method

City / area

Best time to reach you

SECTION 2 Business background

Industry

Number of employees

Locations

Main products or services, and who your customers are

Software and tools you use today (email, CRM, accounting, scheduling, website, etc.)

SECTION 3 What do you want AI to help with?

Describe the problem or opportunity in your own words
What takes too much time, gets missed, or frustrates your team or customers?

SECTION 4 Desired outcome

What would success look like? How will you measure it?

What must the solution do?

What must the solution NOT do?
For example: never send emails without approval, never access payroll, never answer pricing questions.

Who will use it?

How often?

SECTION 5 Project type

Check all that apply.

- ☐ AI Readiness Assessment
- ☐ Website chat assistant
- ☐ Document drafting or processing
- ☐ Task and workflow automation
- ☐ Integration with existing software
- ☐ Not sure yet, need guidance
- ☐ AI Workflow Pilot
- ☐ Internal knowledge assistant
- ☐ Email / inquiry routing
- ☐ Reporting and insights
- ☐ Ongoing AI Operations Support
- ☐ Other (describe in Section 8)

SECTION 6 Information and systems

What information would the AI need? (documents, manuals, FAQs, spreadsheets, databases)

Which systems would it connect to?

Who manages those systems?

Can data be stored in the cloud?

Privacy, security, or compliance requirements (HIPAA, legal, financial, customer data)

SECTION 7 Budget and timeline

Approximate budget

- ☐ Under $1,500
- ☐ $1,500 - $3,500
- ☐ $3,500 - $7,500
- ☐ $7,500 - $15,000
- ☐ Over $15,000
- ☐ Not sure yet

Ideal start date (mm/dd/yyyy)

Deadline (mm/dd/yyyy)

Who approves the project?

Who will test it?

Who will maintain it after launch?

SECTION 8 Additional notes

Anything else we should know?

SECTION 9 Acknowledgment and signature

I confirm the information above is accurate to the best of my knowledge. I understand that submitting this form does not create a contract, commit either party to a project, or guarantee specific results. Integrated Systems will use this information only to evaluate and scope my request.

☐ I agree

Name (typed signature)	Title	Date (mm/dd/yyyy)

Submit by Email

Opens your email with this completed form attached, addressed to sales@integrated-sys.us. Works in Adobe Acrobat Reader. Other PDF viewer? Save the form, then email it to sales@integrated-sys.us or upload it at integrated-sys.us/intake.html.