

Request for Information

CLIENT INTAKE & PROJECT INFORMATION

Please complete this form so I can understand your needs and prepare a tailored brief.
All detailed information is kept confidential.

1 About Your Organisation

ORGANISATION / COMPANY NAME	INDUSTRY / SECTOR
PRIMARY CONTACT NAME	JOB TITLE / ROLE
EMAIL ADDRESS	PHONE NUMBER <i>(optional)</i>
WEBSITE <i>(optional)</i>	COMPANY SIZE <i>no. of employees</i>

2 Business Overview

PROJECT / INITIATIVE NAME <i>(if applicable)</i>
BRIEFLY DESCRIBE YOUR ORGANISATION AND ITS CURRENT SITUATION <i>2-3 sentences</i>
WHAT IS THE PRIMARY CHALLENGE OR OPPORTUNITY YOU ARE LOOKING TO ADDRESS? <i>a question, or 2-3 sentences</i>
WHAT OUTCOME OR IMPACT ARE YOU HOPING TO ACHIEVE?

3 Scope & Requirements

Which of the following best describes the type of support you need?

- | | | |
|---|---|--|
| ☐ Strategy development | ☐ Market research | ☐ Process improvement |
| ☐ Business planning | ☐ Stakeholder engagement | ☐ Other (specify below) |

IF 'OTHER', PLEASE DESCRIBE

What specific deliverables are you expecting? *e.g. brief, report, roadmap, ongoing advisory*

4 Timeline & Budget

DESIRED COMPLETION DATE

HOW FIRM IS THIS TIMELINE?

- | | | |
|---|---|---|
| ☐ Fixed, cannot move | ☐ Preferred but flexible | ☐ Flexible, open to discussion |
|---|---|---|

Services

- | | | |
|--|---|---|
| ☐ \$350 · Country Risk Profile | ☐ \$600 · Strategic Risk Brief | ☐ \$1200 · Executive Risk Report |
| ☐ \$1500+ · Ongoing advisory | | |
| ☐ Prefer to discuss once the scope is clearer | | |

5 Decision & Procurement Process

Is there a formal procurement or tender process in place? *(describe if yes)*

6 Anything Else?

IS THERE ANY BACKGROUND CONTEXT, INTERNAL CONSTRAINTS, OR PRIOR WORK TO BE AWARE OF?

HOW DID YOU HEAR ABOUT ME, OR WHAT PROMPTED YOU TO REACH OUT?

Declaration By submitting this form I confirm that the information provided is accurate to the best of my knowledge. I understand this does not constitute a contractual commitment from either party.

SIGNATURE

DATE

Thank you for taking the time to complete this form. I will be in touch shortly.

westraglobaladvisory@gmail.com · linkedin.com/in/larawestra · Oxford, UK