

studio eighty8

Creative Project Intake:

What to Ask Before You Say Yes

A practical intake framework for creative and brand project managers. Use it before every new engagement.

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Most projects go sideways before they start.

Not because of bad execution. Because the wrong questions were asked at the wrong time, or never asked at all.

Scope creep

Work expands because the original scope was never clearly defined or agreed to in writing.

Wrong client fit

Taking on a project that was never aligned with your strengths, capacity, or values.

Unclear authority

Not knowing who the actual decision maker is until the project is already in motion.

Use this before every new engagement.

01 Send it early

Share the intake questions before or during your first discovery call. Not after. The answers shape whether you take the project at all.

02 Score as you go

Each section has a scoring guide. Add up the points. Use the total to make an informed decision, not just a gut feeling.

03 Document everything

Whatever you learn in intake becomes the foundation of your project brief. Do not start from scratch. Build on what you already know.

04 Review your own patterns

Over time your intake scores will tell you which client types and project types consistently work out. That is your real niche.

Project Fit

Before you evaluate budget or timeline, ask whether this project is actually in your wheelhouse.

Does the scope align with your core services?

Does the project excite you?
Low enthusiasm shows in the work

Have you done similar work before?
Not identical — similar

Are you the right person for this?
If not, who is?

Do you have the capacity to take this on now?
Be honest about your current load

Would you be proud to put this in your portfolio?

Is the timeline realistic given your workload?

Does this move your business in the right direction?

SECTION SCORE

8 Yes answers = strong fit · 5-7 = proceed with caution · Under 5 = reconsider

Client and Stakeholders

Who you are working with matters as much as what you are building. These questions surface the dynamics early.

Who is the final decision maker?

Get a name, not a title

What happened with their last project or agency?

Listen carefully to how they answer this

Who is the day-to-day contact?

Is it the same person?

Are there internal teams we need to coordinate with?

Legal, design, marketing, etc.

How many stakeholders need to approve work?

More than three is a risk flag

Is there a clear brief or are we starting from scratch?

Has the client worked with an external studio before?

Is the client responsive and available during the project?

Ask about their calendar and travel

RED FLAG:

If the client cannot name a single decision maker, or if the last agency relationship ended badly with no clear reason, slow down.

Budget and Timeline

Budget and timeline misalignment are the two most common reasons projects fail. Get specific early.

- Is there a confirmed budget?**
Estimated does not count
- Who approved the budget?**
Is the decision maker in the room?
- Has budget been allocated or does it need approval?**
- Is there flexibility if scope changes?**
- What is the hard deadline and why?**
Understanding the why reveals how fixed it really is
- Are there any dependencies that could affect the timeline?**
Other agencies, legal reviews, third parties

Record Answers

CONFIRMED BUDGET RANGE

Write here...

HARD DEADLINE DATE AND REASON

Write here...

KNOWN DEPENDENCIES OR BLOCKERS

Write here...

BUDGET FLEXIBILITY NOTES

Write here...

Goals and Success

If the client cannot describe what success looks like, you cannot deliver it. Get specific before you start.

- What does a successful outcome look like?**
Ask for specifics, not generalities
- How will success be measured?**
Metrics, milestones, or qualitative?
- What has already been tried?**
Understanding what failed tells you a lot
- What is the one thing that cannot go wrong?**
- Are there any non-negotiables we need to know about?**
Brand standards, legal, stakeholder preferences
- What would make the client recommend studio eighty8 after this?**
Ask this directly

Their Answers

SUCCESS DEFINED AS

Write here...

THE ONE THING THAT CANNOT GO WRONG

Write here...

WHAT THEY WOULD TELL OTHERS ABOUT WORKING WITH US

Write here...

Should you take this project?

Add up your yes answers across all four sections. Use the guide below to make your decision.

STRONG YES

26-32 Yes

Good alignment across all dimensions. Move forward with confidence. Use your intake notes to build the project brief directly.

PROCEED CAREFULLY

18-25 Yes

Some gaps. Identify the specific areas with the most No answers and address them in writing before starting. A scoped and signed brief is non-negotiable.

NEEDS A CONVERSATION

10-17 Yes

More No answers than Yes. This does not mean decline, it means you need a direct conversation about the gaps before committing. Price accordingly for the risk.

DECLINE OR DEFER

Under 10

Too many misalignments. Declining now is better than a difficult project later. You can always refer them to someone better suited.

Intake Summary Worksheet

Fill this in after every discovery call. One page that captures everything you need to decide and move forward.

CLIENT AND PROJECT NAME

Write here...

BIGGEST RISK OR CONCERN

Write here...

DECISION MAKER (NAME, NOT TITLE)

Write here...

WHAT WE STILL NEED TO FIND OUT

Write here...

CONFIRMED BUDGET

Write here...

INTAKE SCORE (OUT OF 32)

Write here...

HARD DEADLINE

Write here...

RECOMMENDATION

Write here...

SUCCESS DEFINED AS

Write here...

NEXT STEP AND DATE

Write here...

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Need someone to run the project after intake?

Intake is step one. Building the workback schedule, managing the stakeholders, keeping everything on track to delivery that is what we do.

[Start a conversation →](#)

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