

CLIENT INTAKE

Priority Compliance Document Rescue

Complete this form before the production window is scheduled

This intake helps Blackforge confirm fit, scope, deadline, approval authority, and source-file boundaries. Complete answers prevent delays. Do not include passwords, access tokens, regulated personal information, or incident evidence in this form.

A. Company and contact

Legal company name

Primary contact / title

Email / phone

Authorized content approver / title

B. Deadline and business need

Requested review-set delivery date and time

Customer, project, bid, audit, or internal event driving the request

What must be submitted or completed?

What happens if the deadline is missed?

C. Source documents

Approximate document count	_____
Formats	☐ Word ☐ PDF ☐ PowerPoint ☐ Excel ☐ Scans ☐ Other: _____
Current organization	☐ Shared drive ☐ Local folders ☐ Email ☐ Platform export ☐ Mixed
Existing identifiers	☐ Controlled document numbers ☐ Revision dates ☐ Owners ☐ None/unknown
Languages	☐ English ☐ Spanish ☐ Other: _____

List the key policies, programs, training files, forms, and customer checklists available

List known obsolete, duplicated, missing, or conflicting documents

D. Requested deliverables

- ☐ Document inventory and revision index
- ☐ Gap and conflict report
- ☐ Customized policy or program
- ☐ Toolbox-talk or awareness presentation
- ☐ Quiz, acknowledgment, and attendance roster
- ☐ Incident-report form
- ☐ Searchable delivery binder

☐ Other: _____

E. Technical and approval boundaries

Customer-specific standards, portal requirements, or contract clauses that must be considered

Legal, privacy, insurance, cybersecurity, HSE, engineering, or document-control reviewers

Statements or topics Blackforge must not change without written approval

Confidentiality, storage, deletion, or transmission restrictions

F. Delivery preferences

Selected package	☐ Pilot (\$750) ☐ Standard (\$1,250) ☐ Rush (\$1,750, if available)
Editable formats	☐ DOCX ☐ PPTX ☐ XLSX ☐ Other: _____
Review method	☐ Email response ☐ Marked-up files ☐ Review meeting
Final delivery	☐ Secure link ☐ Client drive ☐ Other approved method: _____

G. Client confirmations

- ☐ I am authorized to provide the source files and request this work.
- ☐ The client will preserve original source documents and control final approvals.
- ☐ Blackforge deliverables are drafts until accepted by the client's authorized reviewers.
- ☐ The service does not include legal advice, regulatory certification, engineering approval, authorized OSHA Outreach cards, or guaranteed third-party acceptance.
- ☐ The production window begins only after complete intake and reservation payment.
- ☐ One consolidated revision response is included; additional work requires written approval.

Authorized name / title

Signature / date
