ARK-CO-01 — SECTION A · INQUIRY AND QUALIFICATION

Client Inquiry and Lead Capture Form

Editable client onboarding template

Project reference	[PROJECT CODE]	**Document number**	[DOC NO.]
Project title	[PROJECT TITLE]	**Revision**	[REV 00]
Client	[CLIENT NAME]	**Date**	[DD MMM YYYY]

Records a new inquiry consistently and preserves its source, urgency, and next action.

Inquiry details

Date and time received

Inquiry source and campaign reference

Contact name and organization

Telephone, email, and preferred contact method

Project type and location

Referral source or introducer

Initial project snapshot

Requested service

Approximate area or scale

Indicative budget and currency

Desired start date and completion date

Arkdox Office Management System | General administrative information only | Adapt to the project, jurisdiction, and professional requirements | Seek qualified advice where needed

Current project stage

Existing consultants or contractor

Immediate checks

- ☐ Consent to retain and use inquiry information recorded
- ☐ Confidential material flagged
- ☐ Potential conflict identified
- ☐ Service and location appear within practice capability
- ☐ Urgent statutory or site issue noted

Follow-up

Action	Owner	Due	Status
Acknowledge inquiry	[NAME]	[DATE]	Open
Arrange discovery call	[NAME]	[DATE]	Open
Request initial documents	[NAME]	[DATE]	Open

Template completion notes

- Replace all bracketed placeholders and delete unused options.
- Cross-reference the signed appointment, scope, fee, and project information rather than creating inconsistent terms.
- Record unavailable or unverified information expressly; do not leave critical fields ambiguous.
- Obtain jurisdiction-specific professional review where the template creates rights, obligations, permissions, or reliance.

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