

Prepare for your first conversation

A few useful details to bring. No technical presentation needed.

🕒 3 min read Updated October 2026

Tell us what happens today

Choose a real task and walk us through it from start to finish. Explain who does it, how often it happens, where it slows down, and what happens when something goes wrong. A simple example is more useful than a long list of features.

Bring these details if you have them

- The result you want: fewer manual steps, faster replies, clearer reporting, or another specific change.
- The systems involved, approximate weekly volume, languages, and the people who approve decisions.
- A budget range and preferred date, if known. Say “not decided” where needed.

What to leave for later

Do not send passwords, API keys, payment details, or customer records for an introductory call. Use anonymised examples. If access or confidential material becomes necessary, we will agree the right channel and permissions for the project.

Your checklist

0/4 complete

- ☐ Write your goal in one sentence.
- ☐ Bring one example without private information.
- ☐ Invite the person who knows the workflow.
- ☐ List your main questions.

A USEFUL NEXT STEP

Use the project brief builder to collect your answers, then book a call or email the team.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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