MOZINGO SYSTEMS
BUSINESS DATA SOLUTIONS

Project Discovery & Data Intake Sheet

Fill out in 3 minutes — or submit online at **mozingosystems.com/intake/**

Turn your messy data into clean data your business can actually grow on. No technical jargon required — check what fits below so we can give you a straight answer on the right-sized fix, tools, and scope.

1. CONTACT & ORGANIZATION

Date: ___ / ___ / 202__

Your Name & Role _____

Company / Organization _____

Industry & Staff Size _____

Email _____

Phone _____

Referred By (optional) _____

2. CURRENT STATE — WHERE IT HURTS TODAY

Check all that apply

- ☐ Manual weekly/monthly CSV exports & copy-paste
- ☐ Slow, broken, or untrusted Power BI / Excel reports
- ☐ Moving off legacy spreadsheets, Access, or retiring software
- ☐ Two reports or systems show conflicting numbers
- ☐ Duplicate customers, vendors, or messy free-text records
- ☐ Want clean data before using AI (or burned by an AI tool)

What is the #1 spreadsheet, report, or data handoff your team dreads right now? (And roughly how many hours/week does it eat?)

_____

_____

3. TOOLS & DATA SOURCES

Rough estimate is fine

Primary Workspace / Ecosystem

☐ Microsoft 365 / SQL ☐ Google Workspace ☐ Mixed / Unsure

How many systems or spreadsheets feed this?

☐ 1 ☐ 2 ☐ 3–4 ☐ 5+

Systems Involved (e.g., QuickBooks, CRM, ERP, Excel, Access)

_____

_____

Current IT Support

☐ Internal IT ☐ External MSP ☐ No dedicated IT

4. DESIRED END GOAL

Helps right-size tools & cost

Primary Outcome Wanted

☐ Automated Pipeline ☐ Data Cleanup / Fix
☐ System Migration ☐ Live Dashboards (BI)

How many people need to view reports/dashboards?

☐ None (data only) ☐ 1–5 ☐ 6–15 ☐ 16–50 ☐ 50+

How often should numbers refresh?

☐ One-time ☐ Weekly ☐ Daily (7 AM) ☐ Live / Equipment

Data Sensitivity / Permissions

☐ Standard Ops ☐ Financial ☐ Customer PII ☐ Medical / HIPAA
☐ User-level access filters

5. TIMING, BUDGET COMFORT & NOTES

Written scope & price always agreed before paid work starts

Target Timeline / Deadline

☐ ASAP (2–4 wks) ☐ This quarter ☐ Exploring

Preferred Starting Point

☐ Free 15-min Fit Call ☐ Data Triage Audit ☐ 1099 Partner Overflow

What does "done" look like for you? (Any hard software retirement date, license limits, or extra notes)

_____

_____

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Zero vendor lock-in • You own your data, scripts & reports • Not a 24/7 IT help desk

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