

Apples AI Customer Intake Worksheet

Status note: Apples is applying to the OpenAI Partner Network and Anthropic partner ecosystem. Apples is not currently representing itself as an approved OpenAI or Anthropic partner.

Business profile

Field	Answer
Company	
Website	
Industry	
Main contact	
Current tools	

Workflow pain

Question	Answer
Which workflow wastes the most time?	
Where do leads get lost?	
What data is copied manually?	
What happens after-hours?	
What result would make this worth it?	

Access checklist

- CRM or spreadsheet access
- Calendar access
- Email or inbox rules
- Phone/SMS provider
- Payment or invoicing tool
- Relevant SOPs or documents