

# Front Desk Intake Checklist Kit

Keyword: front desk intake checklist

Visible value before checkout: filled example, before/after worksheet, dashboard preview, workbo

Use the scorecard, shortlist, pricing matrix, ROI calculator, RFP questions, and dashboard toget

Sample dashboard: review shortlist quality, risk flags, best ROI case, and missing evidence befo

Before/after: move from scattered notes to comparable vendor evidence and a written decision tra

Current pain: Jotform - Collect baseline cost, owner, and workflow friction before demos.

Budget-safe option: Typeform - Prefer clear plan limits, lower setup work, and exportable data.

Best-fit option: Calendly - Prefer workflow depth, reporting quality, and role permissions.

Implementation-safe option: HubSpot Service Hub - Prefer migration help, onboarding clarity, and

Renewal-risk check: Zendesk - Review cancellation, price increase, data export, and support term

Security check: Google Forms and Sheets - Confirm SSO, audit logs, permissions, backups, and use

Reporting check: Jotform - Ask for dashboard exports that prove value after 30, 60, and 90 days.

Integration check: Typeform - Verify native integrations, paid add-ons, and middleware dependenc

Stakeholder review: Calendly - Record who approved cost, risk, data migration, and final vendor

Final decision: HubSpot Service Hub - Document why the selected route won and which tradeoff was

Post-purchase checkpoint: Zendesk - Schedule adoption, usage, support, and renewal review dates.

Fallback route: Google Forms and Sheets - Keep a lower-cost alternative if implementation risk b

Client-ready note: Jotform - Summarize decision evidence for a client, partner, or finance revie

Risk exception: Typeform - Name any unverified claim and require written vendor confirmation.

Operating record: Calendly - Store the completed kit beside the contract or renewal file.

Conservative: monthly \$259.33 annual \$3112.0

Low budget: monthly \$155.17 annual \$1862.0

Agency operator: monthly \$986.0 annual \$11832.0

SMB operations: monthly \$531.0 annual \$6372.0

Expansion case: monthly \$1661.0 annual \$19932.0