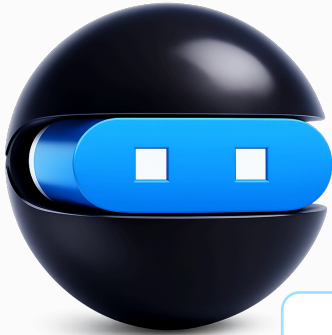


Initial Scope & Requirement Review

Every successful implementation starts with clarity.

This brief collects the essential information Zero Tools needs to understand your business, recommend the most suitable setup, and confirm scope and pricing before implementation begins.



Turning website visitors into conversations starts here.

Before you begin

This brief helps Zero Tools understand your business, goals, requested setup, and important chatbot or Business Automation requirements.

Short answers are completely fine. Clear information helps us recommend the right setup, assess scope accurately, and confirm pricing and next steps.

Estimated completion time

8-12 minutes for chatbot requests.
12-18 minutes if business automation review is included.

Supporting documents

Supporting documents are optional at this stage. You may attach website links, brochures, service information, price lists, screenshots, workflow notes, or other useful materials.

For large files, include a Google Drive, Dropbox, or similar sharing link in Section 7 and make sure access is enabled.



Secure
 Careful handling of business information.



Structured
 Clear review and implementation process.



Practical
 Questions focused on the decisions that matter.



Business-Focused
 Scope aligned with real operational needs.

We appreciate your time and look forward to reviewing your requirements.

Continue on the next page.

Section 1 - Client & Business Essentials

1.1 Business and primary contact

Business Information

Business name:

Website URL:

Country / city:

Business links - optional:

Booking page, catalogue, social pages, or company profile.

Primary Contact

Full name:

Role / designation:

Email address:

WhatsApp / phone:

1.2 Preferred communication

Select all preferred channels. If you have no preference, select only "No specific preference."

- WhatsApp message
 Email
 Phone call
 SMS / text message
 No specific preference

Preferred contact time:

Time zone:

1.3 Business overview

- Service business
 Product-based business
 Ecommerce / online store
 Clinic / healthcare
 Education / training
 Real estate / property
 Solar / energy
 Professional service / agency
 Restaurant / hospitality
 Repair / maintenance
 Other

Other business type:

Main products or services:

1.4 Current customer-contact channels

- Website
 WhatsApp
 Phone
 Email
 Social media
 Walk-in / in person
 Other

Other channel details:

1.5 Main project contact

- Same as primary contact
 Different project contact

If different - name / role:

Email / phone:

Section 2 - Requirement Direction

2.1 What do you need Zero Tools to review or prepare?

Select one main direction. If you are unsure, choose the final option and Zero Tools will recommend the most suitable setup.

- Basic Chatbot**
Common questions and basic enquiry capture.
- Advanced Chatbot**
Guided conversations and better enquiry details.
- Pro Chatbot**
Pro-level English chatbot with smart visitor handling and structured follow-up.
- Pro Chatbot - Arabic**
Pro-level Arabic chatbot delivered through a dedicated right-to-left setup.
- Pro Chatbot & Pro Chatbot - Arabic**
Two dedicated Pro chatbot setups for businesses operating in both English and Arabic.
- Business Automation Review**
Workflow, notifications, tracking, routing, or process improvement.
- Website Chatbot + Business Automation Review**
Review both chatbot setup and workflow/process needs.
- I am not sure yet**
I would like Zero Tools to recommend the most suitable setup.

Section 3 - Project Drivers, Goals & Timing

3.1 Project drivers and goals

Select all that apply.

- | | | |
|--|---|--|
| <input type="checkbox"/> Answer repeated questions faster | <input type="checkbox"/> Capture more enquiries | <input type="checkbox"/> Guide visitors to the right service |
| <input type="checkbox"/> Reduce missed enquiries | <input type="checkbox"/> Improve follow-up | <input type="checkbox"/> Collect better customer details |
| <input type="checkbox"/> Identify priority enquiries | <input type="checkbox"/> Reduce manual work | <input type="checkbox"/> Improve internal workflow |
| <input type="checkbox"/> Increase appointments or quote requests | <input type="checkbox"/> Help more visitors take action | <input type="checkbox"/> Organize enquiries in a sheet / tracker |
| <input type="checkbox"/> Other | | |

Other goal:

In your own words, what would a successful result look like?

3.2 Project urgency

- | | | |
|--|---|---|
| <input type="radio"/> Not urgent - exploring | <input type="radio"/> Review in the next few days | <input type="radio"/> Start within this month |
| <input type="radio"/> Start within 2-3 weeks | <input type="radio"/> Specific launch deadline | <input type="radio"/> Urgent for business |

Important deadline, if any:

Reason / timing notes:

Section 4 - Chatbot Scope

Complete this section if a website chatbot is part of your request. Business Automation-only clients may skip directly to Section 6.

4.1 What should the chatbot mainly help visitors with?

Select all that apply.

- Answer common questions
- Guide visitors to the right service
- Explain products or services
- Capture enquiries
- Collect contact details
- Share pricing / package direction
- Help request an appointment
- Identify priority enquiries
- Send enquiries to the team
- Save enquiries to Google Sheet / tracker
- Support clearer follow-up
- Other

Other purpose:

4.2 Which website pages or areas should it support?

- Homepage
- Services pages
- Product pages
- Pricing page
- Contact page
- Booking / appointment page
- FAQ page
- Support page
- Entire website
- Other

Other page / area:

Important page links, if available:

4.3 Should the chatbot collect enquiry details before handoff?

- Yes, for all enquiries
- No, send visitors directly to contact details
- Only when follow-up is needed
- Not sure - recommend

4.4 What information may need to be collected?

- Full name
- Phone number
- Email address
- City / location
- Service or product interest
- Preferred date / time
- Budget range
- Timeline / urgency
- Message / enquiry details
- Other

Other information:

4.5 Is chatbot content already available?

Select the option that best describes your current content.

- Available on our website
- Available in documents
- Some content exists but needs improvement
- No - Zero Tools will need to guide us
- Not sure yet

Content links or notes:

4.6 Do you already have a preferred conversation structure or wording?

- Yes - we will provide it
- Partially
- No - Zero Tools should recommend
- Not sure yet

4.7 Preferred general style

- Professional and clear
- Friendly and conversational
- Formal / corporate
- Zero Tools should recommend
- Other

4.8 Language setup

- English only
- Arabic only - Pro Chatbot - Arabic
- English & Arabic - Pro Chatbot & Pro Chatbot - Arabic
- Another language - separate review required
- Not sure yet

Important wording, sensitive topics, or restrictions:

Section 5 - Enquiry Handling, Add-Ons & Support

5.1 Where should enquiries go?

- Email notification
- Google Sheet enquiry log
- Sales team / inbox
- Support team / inbox
- Call-back request captured
- Follow-up tracker
- Manual team follow-up
- Not sure - recommend
- Other

Recipient name, role, and email:

5.2 Should some enquiries be treated as priority?

- Yes
- No
- Not sure - recommend

Priority examples or rules:

5.3 Is follow-up tracking required?

- Yes
 No
 Not sure - recommend

5.4 Should different enquiry types go to different people or teams?

- Yes
 No
 Not sure - recommend

Routing notes, if known:

5.5 Common add-ons to review

Selecting an item asks Zero Tools to review it. It does not confirm inclusion or pricing.

- Extra FAQ / content capacity
 Google Sheet Enquiry Log
 Appointment Request Capture
 Extra Guided Service Path
 Priority Enquiry Alert
 Not sure - recommend

5.6 Would you like ongoing support after launch included in our review?

- Yes
 No
 Not sure - explain the options

Section 6 - Business Automation Review

Complete this section only if Business Automation is relevant. Complex workflows, integrations, dashboards, CRM/API syncing, automatic follow-ups, payment collection, calendar syncing, ticketing systems, or multi-system automation require separate review before scope and pricing are confirmed.

6.1 What process do you want to improve?

- Lead or enquiry tracking
 Customer follow-up
 Enquiry assignment
 Appointments / requests
 Internal notifications
 Google Sheet tracking
 Task or status updates
 Reporting
 Customer records
 Support requests
 Other

Other process:

Describe the process briefly:

6.2 How is it handled now?

Biggest problem	Desired result	Systems or tools involved

Important limitations, approval steps, or restrictions:

Section 7 - Website, Documents, Notes & Confirmation

7.1 Website management and platform

Website management - select one

- I manage it myself
- My developer manages it
- My agency manages it
- My team manages it internally
- I am not sure
- Other

Other management details:

Website platform - select one

- WordPress
- Shopify
- Wix
- Webflow
- Custom website
- Not sure - I will ask my developer
- Other

Other platform:

Approver name / role:

Important access or developer notes:

7.2 Supporting information available

- Website / pages
- Service or product information
- Price list
- FAQ / content document
- Brochure / catalogue
- Screenshots or workflow notes
- Logo / brand assets
- Other

Other supporting information:

Attach files when returning this brief, or paste shared links here:

Anything else Zero Tools should know?

Please confirm before submitting

- I have provided the information needed for Zero Tools to review my request.
- I understand final scope and pricing will be confirmed after Zero Tools reviews this brief.
- I understand complex integrations, Business Automation, non-standard language requirements, and custom technical requirements may need separate review.
- I understand selected items may be included, optional, or custom depending on the confirmed scope.

Client name: Signature / typed name: Date:

Submission: Send the completed brief back through the chat where you received it, or email it to support@zerotools.tech. Attach supporting files or include shared links above.