Orderwell

Small Business Project Worksheet

Describe your workflow so we can prepare a suitable scope and quote.

Complete what you know. Keep passwords, payment details, and private customer records out of this worksheet. Return it using the method William provides.

1 Your business

Business name and type of business

City and state / Website

Contact name / Contact email / Phone

Approximate team size

2 The task you want to improve

What task takes too much time?

How do you handle it today?

How often does it happen and how long does each task take?

Who handles or reviews the task?

What would a useful improvement look like?

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3 Your current tools

Software and systems you use

Where does the task begin?

Where should the result go?

Known limitations or review requirements

4 Project preferences

Preferred timing / Budget range if known

Who may approve the project? / Preferred way to communicate

Anything else we should know?

Next steps

Orderwell will review the task and software compatibility, then confirm the scope, price, access, and training plan before paid work begins. This worksheet does not authorize a purchase, grant system access, or enroll you in recurring payments.