

GrayEngines — Automation & AI Project Brief

~10 minutes. Fill what you can — skip anything you're unsure about.

Return to hello@grayengines.com with this PDF and a Drive/Dropbox link to process docs and examples.

Your name: _____

Email: _____

Phone / WhatsApp: _____

1. Company & goal

Company name: _____

What does your business do?

Problem you want solved:

What does success look like?

2. Current process

How is this done manually today?

What should be automated?

Rough workflow (trigger !' steps !' result):

3. Tools & AI needs

Tools you already use:

- ☐ Sheets
- ☐ CRM
- ☐ Email
- ☐ WhatsApp
- ☐ Forms

- ☐ Slack
- ☐ Other: _____

AI / automation needs:

- ☐ Chatbot
- ☐ Doc processing
- ☐ Auto-replies
- ☐ Reports
- ☐ Workflow agents
- ☐ Not sure

Who will use this & how often?

4. Timeline & files

Target timeline:

- ☐ ASAP (4–6 wks)
- ☐ 2–3 months
- ☐ 3–6 months
- ☐ Flexible

Shared folder link (samples, SOPs, examples): _____

Anything else we should know?
