FRICTIONLESS STORY CAPTURE: 3-WORD STORY INTAKE FORM

Project Name:
Date Project Started:
Identity: Specific Problem
Differentiation: Our USP
Aspiration: What Success Looks Like

General Information

Incident Date:	Incident Time:
Location:	Department/Area:

Team Assigned

Name(s):	Role/Position:
Contact Information:	

Incident Details: Identity

Type of Incident: ☐ Safety ☐ Security ☐ Emergency ☐ Property Damage ☐ Other:

Notes:

SECTION 1: Identity

Consequences/Impact:

- ☐ Injury
- ☐ Property Damage
- ☐ Operation Disruption
- ☐ Situation getting worse
- ☐ Affecting daily life/business ops
- ☐ Event deadline
- ☐ Financial Implications
- ☐ Other:

What's at Stake: What Happens if This Isn't Fixed

SECTION 2: Differentation

Issues & Roadblocks

- ☐ Costs
- ☐ Timeline
- ☐ Operation Disruption
- ☐ Quality
- ☐ Trust: Tried Before
- ☐ Complexity of Solution
- ☐ Competitor Assessments
- ☐ Other:

Our Assessment/Recommendation

Why We Recommend This Approach

- ☐ Cost-Effective
- ☐ Minimal Damage/Disruption
- ☐ Timeline
- ☐ Specific Team Expertise
- ☐ Long-Term Value
- ☐ Safety
- ☐ Quick fix vs. long-term
- ☐ Other:

Quote $/Timeline

Quote provided: $_____

Timeline estimate: _____

Quote accepted: □ Yes (date: _____) □ No □ Pending

Surprise Issues Encountered Mid-Project

Problems encountered that weren't visible in the estimate:
How we solved it: _____
Why this approach worked: _____

Extra time/cost involved: _____

Did we charge customer for this? □ Yes □ No
If no, why not: _____

Decisions we made today that show our expertise:
What: _____
Why: _____

Alternative we rejected: _____
Benefit to customer: _____
Photos taken: □ Yes (stored at: _____) □ No
Key photos to capture:
□ Before (showing the problem)
□ During (showing the process/hidden issues)
□ After (showing completed work)
□ Comparison shots (before/after side-by-side)

Customer Interaction Log

Did customer see the work in progress? □ Yes □ No

What did we show/explain to them?

Customer's reaction:
(Direct quotes are gold – write them down!)

Any concerns or questions: Date

When & How we addressed it: _____

SECTION 3: Aspiration

Transformation

PROJECT COMPLETION DETAILS

Completion date: _____

Total days on site: _____

Final cost: $_____

Original quote: $_____

Variance: $_____ □ Over □ Under □ Exact

If variance, why:

FINAL WALKTHROUGH WITH CUSTOMER

Walkthrough conducted by: _____

Date: _____

What we showed the customer:

Customer's immediate reaction (write exact words if possible):

What changed immediately?

□ Problem completely resolved

□ Safety concern eliminated

□ Functionality restored

□ Deadline met (event/inspection/sale proceeded as planned)

□ Customer can now use [space/system] again

□ Other: _____

SECTION 3: Aspiration

Measurable Outcomes

Cost savings: Customer saved $_____ compared to other quotes

Timeline: Completed in ___ days (vs. estimated ___ days)

Efficiency: Used ___ [material/time/resource] instead of ___

Performance: [System] now operates at ___ (vs. ___ before)

Safety rating: Reduced from ___ to ___

Other measurement: _____

THINGS THAT WENT EXCEPTIONALLY WELL

What surprised the customer in a good way?

What did we do that exceeded their expectations?

What problem did we solve that they didn't know they had

Measurable Outcomes

CUSTOMER SATISFACTION

On a scale of 1-10, how satisfied are you with:

The work quality: ___

Our communication: ___

Meeting timeline: ___

Staying on budget: ___

Cleanliness/cleanup: ___

Overall experience: ___

Would you hire us again? □ Yes □ No □ Maybe

Would you refer us to others? □ Yes □ No □ Maybe

STORY PERMISSION & REVIEW REQUEST

We document our projects to help future customers understand how we solve problems like yours. Would you be comfortable with us writing up your project as a case study?"

□ Yes, I'm comfortable with a case study

□ You can use my full name

□ Please use first name only

□ Please keep me anonymous

□ You can use my property address/neighborhood

□ Please keep location general

□ No, please don't write about my project

If YES, also ask:

"We'd also love to get a review from you. Here's the exact situation and outcome we'd mention. Does this sound accurate?"

Read them this 2-3 sentence summary (fill in as you talk):

"[Customer name/type] came to us with [specific problem] and [stakes/urgency]. We [what you did differently] and [why you chose that approach]. [Time period] later, [current status/outcome] and [measurable result]."

Customer agrees this is accurate: □ Yes □ Needs revision

Revisions needed: _____

Review request method:

□ Text message (we'll send link)

□ Email (we'll send link)

□ We'll write the review text, customer will post it

□ Customer will write their own

AI Visibility Test

What Problem Would Your Customer Type Into AI Search to Find You?

Example: ❌ NOT: "tree service near me"

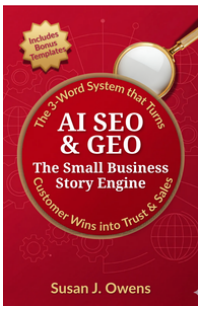
✅ THIS: "My tree is leaning toward my house after the storm, is it going to fall?"

Type that problem into your favorite AI search tool

Is your business mentioned? □ Yes □ No

Who shows up instead?

What do they say that gets them recommended?



IDA Story Builder: Turn One Customer Win Into an AI-Readable Story

NAME ONE RECENT CUSTOMER PROJECT THAT WENT REALLY WELL

Something you're proud of. A happy customer. A problem you solved.

ONE SENTENCE EACH:

I - IDENTITY

Who was this for & what was wrong?

PROMPT: Think: customer type + specific problem + why it mattered

EXAMPLE: "Restaurant owner, water heater died 2 hours before dinner service, would have to close for health code violation.

D - DIFFERENTIATION

What did you do that most competitors wouldn't?

PROMPT: Think: specific action + why you chose it + what others would do instead

EXAMPLE: "Arrived in 40 minutes with commercial unit already in stock, installed in 90 minutes (most companies need 2-3 days to order)"

A - ASPIRATION

What's different now?

PROMPT: Think: measurable outcome + timeline + current status

EXAMPLE: "Restaurant opened on time, system running perfectly 6 months later"

Now write the AI search question a customer would type to find this story: