

Intake One-Pager

HOLD The gate for anything new entering the stack.

This is a form. Fill it in before a tool goes in or a feature gets switched on. One page, a few minutes, then a decision. A gate people route around is not a gate, so keep it this short.

Requested by	Proposed owner	Date
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#	Question	Answer
1	What is it, in one line?	
2	What job does it do that we cannot already do today?	
3	Does anything in the stack already do this?	☐ No ☐ Yes →
4	What data does it touch (read, write, send out)?	
5	Does it use AI, and does it train on our data?	☐ No AI ☐ AI, no training ☐ AI, trains → can we opt out? ☐ Yes ☐ No
6	How is it arriving?	☐ Buying it we own ☐ Feature in a tool ☐ On by default (keep or kill)
7	If it goes wrong, what breaks, and who is affected?	
8	Cost, and whose budget?	

On question 2, if the honest answer is “what tool X already does,” stop and use X. On question 8, a feature often costs nothing, and questions 4 to 7 still decide it.

Decision	☐ Approve	☐ Approve with conditions	☐ Reject
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Decided by

Decision	☐ Approve	☐ Approve with conditions	☐ Reject
Date			