Rodriguez Consulting

Client Intake — websites, speaking, and EGS program consulting

www.DrCRodriguez-Consulting.com
Fort Worth, Texas

Complete what applies to you; none of it is binding. Fill this in on screen, or print it and write on it.
We review every intake personally and reply within two business days.

STEP 1 — WHAT BRINGS YOU HERE? (CHECK ONE)

- ☐ A website or digital project
- ☐ A speaking engagement
- ☐ EGS program or verification help
- ☐ Not sure yet — let's talk

STEP 2 — ABOUT YOU

NAME AND CREDENTIALS

EMAIL

PHONE

PRACTICE, PROGRAM, OR INSTITUTION

CITY AND STATE

HOW DID YOU HEAR ABOUT US?

STEP 3A — IF YOU WANT A WEBSITE OR DIGITAL PROJECT

SPECIALTY

HOW MANY PHYSICIANS ON THE SITE?

CURRENT WEBSITE, IF ANY

TIMELINE (EXPLORING / 1–3 MO / 3–6 MO / ASAP)

THE PROCEDURES YOU PERFORM MOST (TOP 5 TO 10)

PROCEDURES OR TOPICS YOU DO NOT WANT FEATURED

WHAT YOU ALREADY HAVE (CHECK ALL THAT APPLY)

- ☐ Patient handouts (PDF or paper)
- ☐ Professional photos / headshot
- ☐ A domain name I own
- ☐ Writing samples in my own voice
- ☐ Active LinkedIn or Instagram
- ☐ Patient-education videos

SERVICES YOU'RE INTERESTED IN (CHECK ALL THAT APPLY)

- ☐ Website development & maintenance
- ☐ Ongoing education blog / content
- ☐ EGS or program website
- ☐ Surgical registry or dashboard
- ☐ EGS program or verification consulting
- ☐ Speaking engagement

STEP 3B — IF YOU WANT A SPEAKING ENGAGEMENT

EVENT OR SERIES NAME

DATE OR APPROXIMATE WINDOW

FORMAT (ROUNDS / CONFERENCE / RETREAT)

TALK LENGTH

IN PERSON OR VIRTUAL

AUDIENCE AND APPROXIMATE SIZE

TOPICS OF INTEREST (CHECK ALL THAT APPLY)

- ☐ AI in Surgical Practice
- ☐ Robotics in Acute Care Surgery
- ☐ Patient Education That Actually Works
- ☐ EGS Verification: Lessons from Inside the Process
- ☐ Building an EGS Program from Scratch
- ☐ Something else — described below

HONORARIUM, TRAVEL, CME REQUIREMENTS, AV SETUP, OR ANYTHING ELSE

STEP 3C — IF YOU WANT EGS PROGRAM OR VERIFICATION HELP

WHERE IS THE PROGRAM TODAY? (NO SERVICE / INFORMAL / ESTABLISHED / PREPARING / VERIFIED)

HOSPITAL SIZE AND SETTING

APPROXIMATE ANNUAL EGS VOLUME

EGS MEDICAL DIRECTOR IN PLACE? (YES / NO / IN NAME ONLY)

TARGET VERIFICATION DATE, IF ANY

WHERE DO YOU WANT HELP? (CHECK ALL THAT APPLY)

- ☐ Gap analysis against the standards
- ☐ Data capture and registry
- ☐ Transfer and referral pathways
- ☐ Performance improvement process
- ☐ Call structure and staffing model
- ☐ Mock review and readiness assessment

STEP 4 — ANYTHING ELSE

ANYTHING ELSE WE SHOULD KNOW?

When you're done

Save this file and email it to info@drcrodriguez-consulting.com. We reply within two business days.
Writing samples, handouts, photos, and program documents are exchanged over that email thread.