



Lead / Client Intake Form

The following is a template to work from when speaking with a potential client. The form should act as both a form for the information needed for their contact record in our database, as well as a springboard to launch conversation and build rapport.

Name: _____

Phone: (____) _____ - _____

Intro Call Questions to Ask:

- ☐ How did they hear about us? _____
- ☐ The general area where they live: _____
- ☐ E-mail address: _____ (so Central can send more info)
- ☐ What's going on / How can we help create order? _____

- ☐ Who lives in the space? _____
- ☐ Size of space / number of rooms they want to focus on: _____

Conversation Starters:

5 Steps of Organizing: Sort Decide Contain Label Maintain

- ☐ Have you worked with an organizer before? _____
- ☐ What's working? _____
- ☐ What's not working? _____
- ☐ Why do you want to get organized? _____
- ☐ Do you have a timeline for this project? _____
- ☐ What type of organizing do they want?
 - ☐ Hands-on help
 - ☐ Coaching & Consultation
 - ☐ Both

☐ Are they going to be present for the session(s)?

☐ Their Organizing Circumstance(s):

- ☐ Disability
- ☐ Household Change
- ☐ Lifestyle Change
- ☐ Paper Overwhelm
- ☐ Relocation / Remodel

For The Booking:

☐ Date of Appointment: _____ Time of Appointment: _____

☐ Address: _____

☐ Any parking/gate instructions? _____

☐ Any pets in the home? _____

Notes
