



## Intro Call with Potential Client

**Objective:** The following is a template to work from when speaking with a potential client. The form should act as both a form for needed information as well as a springboard to launch conversation and build rapport. Once completed, add client to Jobber, take a picture of this form and add to client folder.

Name: \_\_\_\_\_

### Intro Call Questions to Ask:

Phone: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

- ☐ 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? \_\_\_\_\_ In person or Virtually? \_\_\_\_\_
- ☐ What's working? \_\_\_\_\_
- ☐ What's not working? \_\_\_\_\_
- ☐ Why do you want to get organized? \_\_\_\_\_
- ☐ Do you have a timeline for this project? \_\_\_\_\_
- ☐ HANDS -ON PROJECTS ONLY: Were you hoping to work side by side with an organizer, do a combination of side by side work and follow up homework assignments, or have the organizer work on the project independently? \_\_\_\_\_
- ☐ VIRTUAL PROJECTS ONLY: Are you comfortable taking direction from an Organizer and then doing the physical work yourself? \_\_\_\_\_  
If not, do you have anyone there that could do the physical work? \_\_\_\_\_.

Do you have Skype/Zoom or FaceTime for video chat, or would you prefer to work together on the phone? \_\_\_\_\_ If they prefer working by phone, they will need to send photos.

**For Booking:**

- ☐ Address: \_\_\_\_\_
- ☐ Any parking/gate instructions? \_\_\_\_\_  
\_\_\_\_\_
- ☐ Any pets in the home? \_\_\_\_\_
- ☐ Does anyone smoke in the house? \_\_\_\_\_
- ☐ Date of Appointment: \_\_\_\_\_ Time of Appointment: \_\_\_\_\_