



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: _____