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| Sample Client Call / Intake Form | Placeholder Logo |

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| Good morning / afternoon / evening, thank you for calling COMPANY NAME. | | |  | | | | Date | | |  | | |  | |  | |  |  |
|  | | | |  | | | MM | | |  | | DD | |  | YY |
| This is |  | |  | | | | | |  | | | | | | | | | |
|  | Name of Representative/Executive | |  | | | | | |  | | | | | | | | | |
| I’ll be glad to assist you today. May I please ask with whom I am speaking? | | | Name of Client | | | | | |  | | | | | | | | | |
| Thank you; client name, do you mind sharing your occupation? | | | Occupation | | | | | |  | | | | | | | | | |
| Have you used any of our services before? | | | Yes |  | | No | | |  | | | Specify | | | |  | | |
| How may I assist you today? | | | Client Requirement | | | | | |  | | | | | | | | | |
| Thank you! I will get back to you with more information within the next 2 hours/days/weeks | | |  | | | | | | | | | | | | | | | |
| When would be a good time to reach you? | | | Time | | | | | |  | | | | | | | | | |
| What number should I call? | | | Phone Number | | | | | |  | | | | | | | | | |
| Is this your home, work or mobile number | | | Home |  | | Mobile | | |  | | | Work | | | | | |  |
| In case you miss our call (or give another reason), can I also please have your email address to share this information to you through email? | | | Email | | | | | |  | | | | | | | | | |
| IF LOCATION IS REQUIRED: Can you please share your address with me? | | | Address |  | | | | | City | | | | |  | | | | |
| State |  | | | | | Zip Code | | | | |  | | | | |
| Is there any other information you want to share with us, (dietary preferences, person with disabilities, military, senior citizen etc.)? | | | Military |  | | Vegan | | |  | | | Person with disabilities | | | | | |  |
| Senior Citizen |  | | Your Own | | |  | | | Your Own | | | | | |  |
| Is there anything else that I can assist you with? | | | If Yes, add Client Requirement | | | | | |  | | | | | | | | | |
| Thank you for your interest in our services. | | |  | | | | | |  | | | | | | | | | |
| Once again, this is | |  | | | from COMPANY NAME. | | | | | | | | | | | | | |
|  | | Name of Representative/Executive | | |  | | | | | | | | | | | | | |
| You can reach us at PHONE NUMBER. We are available from | | | | |  | | | to | | |  | | Mondays to Saturdays | | | | | |
| all 7 days of the week. | | | | | | | | | | | | | | | | | | |
| I will be in touch with you soon.  Thanks again for your call and have a wonderful day | | | | | | | | | | | | | | | | | | |