|  |  |
| --- | --- |
| Sample Client Call / Intake Form | Placeholder Logo |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 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 |