

Client intake form

14 questions. About 4 min to answer.

Contact details

1. Full name Required

2. Email Required

E-mail:

3. Phone

Phone number:

About the business

4. Company name and website

5. Industry Required

Choose one answer.

- | | |
|---|---|
| ☐ Retail stores | ☐ Education |
| ☐ Ecommerce | ☐ Tech or software |
| ☐ Professional services | ☐ Hospitality and tourism |
| ☐ Finance and insurance | ☐ Manufacturing |
| ☐ Real estate | ☐ Nonprofit |
| ☐ Health and wellness | ☐ Other |

6. How many people work at your company? Required

Choose one answer.

- | | |
|-------------------------------|---------------------------------------|
| ☐ Just me | ☐ 51–200 |
| ☐ 2–10 | ☐ 201–1,000 |
| ☐ 11–50 | ☐ More than 1,000 |

The project

7. Which services are you interested in? Required

Choose all that apply.

- ☐ [Service 1]
- ☐ [Service 2]
- ☐ [Service 3]
- ☐ [Service 4]
- ☐ [Service 5]
- ☐ Not sure yet, I'd like your advice

8. What do you want to achieve? Required

9. When would you like to start? Required

Choose one answer.

- ☐ As soon as possible
- ☐ Within a month
- ☐ In 1–3 months
- ☐ In more than 3 months
- ☐ I'm just exploring options for now

10. What is your approximate budget?

Choose one answer.

- ☐ Under \$1,000
- ☐ \$1,000–\$4,999
- ☐ \$5,000–\$19,999
- ☐ \$20,000 or more
- ☐ Not sure yet

Past experience and next step

11. Have you hired a similar service before?

Choose one answer.

- ☐ Yes
- ☐ No

12. What worked well, and what didn't?

13. Links to a brief or other documents

14. What's the best way to reach you? Required

Choose one answer.

- ☐ Email
- ☐ Phone call
- ☐ Video call
- ☐ WhatsApp or another messenger

Run it online for free

Copy this template to SurveyNinja, send the link and the answers go into a ready report with charts.

surveyninja.io/templates/client-intake-form

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