**[A green sign with white text

Description automatically generated with low confidence](https://www.smartsheet.com/try-it?trp=10851&utm_source=integrated-content&utm_campaign=/content/client-intake-form-template&utm_medium=Small+Business+Client+Intake+Form+doc+10851&lpa=Small+Business+Client+Intake+Form+doc+10851)SMALL BUSINESS CLIENT**

**INTAKE FORM**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| COMPANY NAME | |  | |  | | | YOUR LOGO | | | |
| ADDRESS LINE 1 |  |  | | |  | | |  | | |
| ADDRESS LINE 2 |  |  | | |  | | |
| CITY / STATE / ZIP |  |  | | |  | | |
| PHONE |  |  | | |  | | |
| WEB ADDRESS |  |  | | |  | | |  | |  |
|  |  |  | | |  | | |  | |  |
| DATE |  |  | | | ADMINISTRATOR | | | | |  |
| MM/DD/YY | | | | Name | | | | | | |
| CLIENT ONBOARD INFORMATION | | | |  | | |  | |  | |
| CONTACT NAME |  | |  | | |  | | | | |
| CONTACT TITLE |  | | BUSINESS ADDRESS | | |  | | | | |
| MAIN PHONE |  | |  | | |  | | | | |
| FAX |  | |  | | |  | | | | |
| WEBSITE |  | | HOME ADDRESS | | |  | | | | |
| EMAIL |  | |  | | |  | | | | |
| BUSINESS INFORMATION | |  | |  | | |  | |  | |
| COMPANY NAME |  | | BUSINESS ADDRESS | | |  | | | | |
| MAIN BUSINESS TYPE |  | |  | | | | |
| MAIN PHONE |  | |  | | | | |
| FAX |  | | EMAIL | | |  | | | | |
| WEBSITE |  | | | | | | | | | |
| *How did you first hear about us?* | |  | |  | | |  | |  | |
|  | | | | | | | | | | |
| *What is the nature of your business with us?* | |  | |  | | |  | |  | |
|  | | | | | | | | | | |
| *What past negative issues have you come across with this type of service?* | | | | | | | |  | |  |
|  | | | | | | | | | | |
| *What kind of budgetary concerns do you have?*  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO | | | |  | | |  | |  | |
|  | | | | | | | | | | |
| *What types of services are you interested in?* | | | |  | | |  | |  | |
|  | | | | | | | | | | |

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