

**HR CLIENT INTAKE FORM**

Disclaimer: Thank you for your interest in being a client of [HR SERVICE PROVIDER'S NAME]. This form is used to collect information about new clients and used for internal purposes only. The information you provide is confidential and will be treated accordingly.

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| **CLIENT INFORMATION** |

**Company Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Street Address**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**City**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **State**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **ZIP Code**: \_\_\_\_\_\_\_\_

**Phone**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Website**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Person Information:

**Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Position**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**E-Mail**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Phone (if different)**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **QUESTIONNAIRE** |

**What type of business do you have?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**How many employees are currently in your company?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**What are the main products or services that you offer?**

**What are the main HR challenges you are currently facing?**

**What are your company’s short-term HR goals?**

**What are your company’s long-term HR goals?**

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| **HR SERVICES** |

Which of the following would you like assistance with?

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| --- | --- | --- | --- |
| [ ]  | Compensation and Benefits | [ ]  | Employment Law Compliance |
| [ ]  | Credentials Verification | [ ]  | HR Technology and Software |
| [ ]  | Document Drafting | [ ]  | Interview Coaching |
| [ ]  | Downloadable Documents | [ ]  | Job Descriptions |
| [ ]  | Education Verification | [ ]  | Performance Management |
| [ ]  | Employee Engagement | [ ]  | Policies/Employee Manuals |
| [ ]  | Employee Retention | [ ]  | Reference Checks |
| [ ]  | Employee Terminations | [ ]  | Talent Acquisition and Recruitment |
| [ ]  | Employment Agreements | [ ]  | Training and Development |

List any other HR issues that you would like us to address:

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| **REFERRAL** |

**Were you referred to us by someone else?** [ ]  Yes [ ]  No

* If yes, by whom? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* If no, how did you hear about us? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **SIGNATURE** |

**Client Signature**: [\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_](https://esign.com/) **Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_