



HR CLIENT INTAKE FORM

Disclaimer: Thank you for your interest in being a client of .
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.

CLIENT INFORMATION

Company Name: _____

Street Address: _____

City: _____ **State:** _____ **ZIP Code:** _____

Phone: _____ **Website:** _____

Contact Person Information:

Name: _____ **Position:** _____

E-Mail: _____ **Phone (if different):** _____

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?

HR SERVICES

Which of the following would you like assistance with?

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

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

REFERRAL

Were you referred to us by someone else? Yes No

- If yes, by whom? _____
- If no, how did you hear about us? _____

SIGNATURE

Client Signature: _____ **Date:** _____

Print Name: _____