

# SMALL BUSINESS CLIENT INTAKE FORM

Try Smartsheet for FREE

YOUR LOGO

DATE

ADMINISTRATOR

--	--

## CLIENT ONBOARD INFORMATION

CONTACT NAME		BUSINESS ADDRESS	
CONTACT TITLE			
MAIN PHONE			
FAX		HOME ADDRESS	
WEBSITE			
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?*

*What types of services are you interested in?*

## **DISCLAIMER**

Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk.