



New Client Intake Form

Client Information

Company Name: _____

Industry: _____

Company Size: ☐ 1-10 employees ☐ 11-50 ☐ 51-200 ☐ 201-500 ☐ 500+ employees

Years in Business: _____

Primary Contact Information:

Name: _____

Title: _____

Email: _____

Phone: _____

Preferred Communication Method: ☐ Email ☐ Phone ☐ Text ☐ Other: _____

Current HR Landscape

Does your company currently have:

☐ Dedicated HR staff (If yes, how many? _____)

☐ HR policies and procedures manual

☐ Employee handbook

☐ Performance review process

☐ Onboarding process

☐ HR software/systems (Which ones? _____)

Current HR Challenges: (Check all that apply)

☐ Recruitment and hiring

☐ Employee retention

☐ Performance management

☐ Compliance issues

☐ Workplace conflicts

☐ Training and development

☐ Compensation and benefits

☐ Employee engagement

☐ Policy development

☐ Other: _____

Workplace Challenge Assessment

Leadership & Management Issues:

- ☐ Inconsistent management styles across departments
- ☐ Lack of leadership development/training
- ☐ Poor communication from leadership to staff
- ☐ Difficulty delegating effectively
- ☐ Resistance to change from management
- ☐ New managers struggling with transition to leadership
- ☐ Senior leadership alignment issues

Team Dynamics & Culture:

- ☐ Low morale or negative workplace culture
- ☐ Lack of collaboration between departments
- ☐ Generational conflicts in the workplace
- ☐ Remote/hybrid work challenges
- ☐ Trust issues between management and staff
- ☐ Cliques or divisive groups forming
- ☐ Lack of diversity, equity, and inclusion initiatives

Communication Challenges:

- ☐ Poor internal communication systems
- ☐ Feedback not flowing up or down effectively
- ☐ Meetings are unproductive or too frequent

- ☐ Conflict avoidance
- ☐ Information silos between departments
- ☐ Difficulty delivering difficult conversations

Performance & Accountability:

- ☐ Inconsistent performance standards
- ☐ Avoiding difficult performance conversations
- ☐ Lack of clear goals and expectations
- ☐ No consequences for poor performance
- ☐ High performers becoming disengaged
- ☐ Micromanagement issues
- ☐ Burnout among top performers

Employee Development & Growth:

- ☐ Limited career advancement opportunities
- ☐ Lack of skills training programs
- ☐ No succession planning
- ☐ Employees outgrowing their roles
- ☐ Knowledge gaps in critical areas
- ☐ Onboarding process ineffective

Operational Workplace Issues:

- ☐ High turnover in specific departments
- ☐ Difficulty attracting quality candidates
- ☐ Excessive overtime/work-life balance issues
- ☐ Safety or wellness concerns
- ☐ Technology adoption/change management
- ☐ Customer service/external relationship impacts



Describe your top 3 most pressing workplace challenges in detail:

1. Most Critical Challenge:

How long has this been an issue? _____

What have you tried to address it? _____

What impact is it having on the business? _____

2. Second Priority Challenge:

How long has this been an issue? _____

What have you tried to address it? _____

What impact is it having on the business? _____

3. Third Priority Challenge:

How long has this been an issue? _____

What have you tried to address it? _____

What impact is it having on the business? _____

Cultural Assessment: How would you describe your current workplace culture in 3 words?

What kind of workplace culture do you want to create?



Leadership Development Needs:

- ☐ First-time manager training
- ☐ Conflict resolution skills
- ☐ Emotional intelligence development
- ☐ Strategic thinking and planning
- ☐ Communication and presentation skills

- ☐ Change management capabilities
- ☐ Building and leading high-performing teams
- ☐ Other: _____

Are you interested in ongoing HR consulting services beyond this session?

- ☐ Yes ☐ Maybe ☐ No ☐ Too early to tell

If yes, what type of ongoing support interests you most?

- ☐ Monthly retainer for ongoing HR support
- ☐ Project-based consulting
- ☐ Additional training sessions
- ☐ HR policy development
- ☐ Recruitment support
- ☐ Compliance audits

Additional Information

How did you hear about our services?

- ☐ Referral (from whom? _____) ☐ Website ☐ Social media ☐ Networking event
- ☐ Other: _____

Is there anything else you'd like us to know?
