

# Sapphire Connect Staffing - Client Intake Form

## Agency Information

Agency Name:

Primary Contact Person:

Job Title:

Phone Number:

Email Address:

Office Address:

Website (if applicable):

## Staffing Needs

What positions are you hiring for?

- ☐ Licensed Insurance Agent (P&C)
- ☐ Licensed Life & Health Agent
- ☐ Customer Service Representative
- ☐ Account Manager
- ☐ Office Manager
- ☐ Sales Representative
- ☐ Other

Number of open positions:

Employment type:

- ☐ Full-Time
- ☐ Part-Time
- ☐ Temp-to-Hire
- ☐ Seasonal
- ☐ Remote
- ☐ In-Office

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Preferred start date:

Is a valid insurance license required?

- ☐ Yes  
☐ No  
☐ Preferred but not required

### Compensation & Benefits

Base Salary Range:

Bonus or Commission Structure (if any):

Benefits Offered:

- ☐ Health Insurance  
☐ Retirement Plan  
☐ PTO  
☐ Continuing Education Support  
☐ Other

### Ideal Candidate Profile

Required Experience (Years/Industry Specific):

Key Skills or Certifications:

Top 3 traits of your ideal candidate: 1.

2.

3.

### Interview & Hiring Preferences

Preferred interview format:

- ☐ In-Person

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- ☐ Phone  
☐ Zoom/Video

Interview availability (Days/Times):

Who will be involved in hiring decisions?

### Additional Notes or Preferences

*Submit this form to: [info@sapphireconnectstaffing.com](mailto:info@sapphireconnectstaffing.com) | [www.sapphireconnectstaffing.com](http://www.sapphireconnectstaffing.com) | 405-977-5110*