



CLIENT ASSESSMENT FORM

Client Information

Today's Date: _____

Name: _____ Phone: _____

Cell or Home: _____

Referred by? / How did you discover Solutions by Sherri LLC?:

Address: _____

City: _____ Zip: _____

Email: _____

Occupation: _____

Household (family members/ roommates/ages):

Pets (how many/type or breed): _____

Note: For safety, owners are responsible for managing pets that may bite or show aggressive behavior during visits.

Getting to Know the Client

Size and type of home/office: _____

Areas of concern (check all that apply):

☐ Home office	☐ Mail/papers/filing	☐ Kitchen
☐ Dining room	☐ Living/family room	☐ Bedroom
☐ Kids' room	☐ Basement	☐ Garage
☐ Attic	☐ Craft room	☐ Laundry
☐ Entryway	☐ Other: _____	



843-333-8291



SolutionsbySherri@gmail.com



SolutionsbySherri.com



Solutions by Sherri LLC

Motivation for getting organized (check all that apply):

☐ Stress	☐ Frustration	☐ Relationships
☐ Move	☐ Job change	☐ Remodeling
☐ Illness	☐ Can't find things	☐ Can't have people over
☐ Need storage	☐ New baby	☐ Too much stuff
☐ Just can't get started	☐ Super busy	☐ Need defined homes / Other: _____

Expectations & Goal Completion Indicators

Once you're organized, how do you hope to feel? _____

What does "success" look like to you for this project?

Check all that apply:

☐ Create homes for all possessions	☐ Find what you need when you need it	☐ Space has new purpose
☐ Storage solutions discovered	☐ Possessions downsized/decluttered	☐ New skills learned
☐ Smooth flow to each day	☐ More time to relax	☐ Lower stress level
☐ Increased confidence/self-image	☐ Improved relationships	☐ More productive/efficient
☐ Clutter-free/healthier environment	☐ New good habits formed	☐ Other: _____





Current Organization Strategies

What IS working well in your home/office? _____

What is NOT working well in your home/office? _____

How do you handle your to-do's? _____

How do you handle time management? _____

Do you use any kind of planner, calendar, smartphone, online calendar system, or computer program? _____

Learning Style & Special Needs

Learning Style – How do you learn best? (check one):

☐ Visual ☐ Auditory ☐ Kinesthetic

Special Needs – Do you feel you have any tendencies toward:

☐ ADD/ADHD	☐ OCD
☐ Anxiety	☐ Depression

Physical or other limitations:

Aesthetic Preferences & Challenges/Surprises

Do you prefer visible or hidden storage systems? _____

Favorite colors or decorating styles? _____

Favorite home goods stores? _____



843-333-8291



SolutionsbySherri@gmail.com



SolutionsbySherri.com



Solutions by Sherri LLC



Challenges & Surprises (check all that apply):

☐ Bugs/rodents (traps?)	☐ Mildew/mold
☐ Sexually explicit material	☐ Guns on premises

Note: A \$50-\$100 surcharge may apply depending on the severity of pest issues.

Release Purposes & Timing

How will we handle your discards? (check all that apply):

☐ Donation ☐ Garbage ☐ Give to family/friends ☐ Other: _____

What percentage would you want to declutter? _____

When are the best days/times to meet? _____

What is your deadline or timeframe? _____

Budget & Resources Needed

Do you have a budget in mind? _____

Disclaimer: Services are billed at an hourly rate. Project pace depends on the client's involvement in discarding and decluttering items. Active participation helps expedite results, while additional time may be needed if decision-making is more challenging. Further details are provided at the end of this form.

Resources needed for this project (check all that apply):

☐ Junk hauler	☐ House cleaner	☐ Handyman
☐ Closet/shelving installer	☐ Painter	☐ POD/storage company
☐ Admin assistant/VA	☐ Family members/friends	☐ Additional POs
☐ Estate sale manager	☐ Other: _____	



843-333-8291



SolutionsbySherri@gmail.com



SolutionsbySherri.com



Solutions by Sherri LLC



Magic Moment

What are the three areas I could wave my magic wand to fix first?

1. _____
2. _____
3. _____

At Solutions by Sherri, every project moves at the client's pace. My services are billed hourly because no two clients work the same way. Some clients are very hands-on and quick to make decisions, while others may need extra time — and that's perfectly okay!

Your level of involvement in discarding and decluttering will set the pace for our progress. Once I know what you'd like to keep and what can be released, I can step in and truly work my magic — creating organized, functional, and peaceful spaces that support your lifestyle.



843-333-8291



SolutionsbySherri@gmail.com



SolutionsbySherri.com



Solutions by Sherri LLC