



Client Intake Form

Help us understand your business and the support you need, so we
can match you with the right people.

Get Matched With the Right Support

Tell me a little about your business and what you need help with. I will follow up to set up a short discovery call. Takes about 5 minutes.

About You

1. Full name

2. Email and phone

3. Business name and website

4. What type of coaching do you do?

☐ Life ☐ Health ☐ Business ☐ Other

What You Need

5. What tasks take the most of your time that you would like to hand off?

6. How many hours per week do you expect your support person to work?

☐ Under 10 ☐ 10-20 ☐ 20-30 ☐ 30+

7. Do you have a location or region preference?

☐ US-based ☐ India ☐ Philippines ☐ No preference

Budget and Timeline

8. What hourly rate or monthly budget have you set aside?

☐ Under \$8/hr ☐ \$8-15/hr ☐ \$15-25/hr ☐ \$25+/hr ☐ Not sure yet

9. Is this budget approved and ready to commit?

☐ Yes ☐ Pending ☐ Still deciding

10. When do you want your new support person to start?

☐ Within 2 weeks ☐ 2-4 weeks ☐ 1-2 months ☐ Just exploring

11. How much time per week can you commit to training and check-ins in the first 30 days?

☐ Under 1 hour ☐ 1-2 hours ☐ 3+ hours

Your Goals

12. If the right support were in place, what would improve in your business or day-to-day life?

13. What would make this support feel successful to you?

Think about the first 90 days

14. How did you hear about me?

Thank you! Save this file and email it back to me.