

Client Requirement Questionnaire

Client Information

Name: _____
Company: _____
Address: _____
Telephone: _____
Email: _____
Website: _____

Business Information

Please tell me a little about your business and the services you offer: _____

Client Questionnaire

These questions help us to find out more about you and your administrative needs so we can start our relationship on the right track. Please take a moment to answer them honestly.

1. What administrative challenges are you facing at the present time? _____

2. Regarding the administrative aspects of your business, what is it that you like doing the least? _____
3. If you could delegate two tasks to someone else, what would they be? _____

4. Do you send out standard responses to enquiries? **Yes/No**
5. Do you do bulk mailings to clients or potential clients? **Yes/No**
6. Do you have functions that are preformed on a regular basis? **Yes/No**
7. Do you have tasks that are not getting done or not in a timely manner? **Yes/No**
8. Do you miss important dates? **Yes/No**
9. When you have been out of the office all day, what do you have the most of when you return? **Email/Voicemail/Faxes**
10. What things should we know about you in order to make this a successful working relationship? _____

Please complete and fax to 0141 530 8011 or email to admin@diamondsecretarial.co.uk