

Customer Assessment Form Sample for Onboarding New Clients

Use this **customer assessment form sample** to streamline the onboarding process for new clients, ensuring all essential information is collected efficiently. It helps businesses evaluate client needs and preferences to offer personalized services. Implementing this form improves communication and boosts client satisfaction from the start.

Client Information

Company Name:

Primary Contact Name:

Email Address:

Phone Number:

Business Details

Industry:

Company Size:

1-10 Employees

Company Location:

Client Needs & Preferences

Select Services Interested In:

☐ Consulting

☐ Training

☐ Implementation

☐ Support

☐ Other

What are your primary goals for this partnership?

Additional Information

Comments or Special Requirements:

Submit Assessment