**Client Intake Form – Coco HR Consultancy & PA Services**

**Welcome to Coco HR Consultancy & PA Services!** Please complete the form below so we can tailor our services to your business needs.

**Client Information**

* **Full Name:**
* **Business Name:**
* **Email Address:**
* **Phone Number:**
* **Business Address (optional):**

**Business Details**

* **Type of Business:**
* **Years in Operation:**
* **Number of Team Members:**
* **Website/Social Media (if any):**

**Services Needed (Check all that apply):**

☐ Virtual Assistant Support  
☐ HR Consulting  
☐ Recruitment & Onboarding  
☐ Process Automation  
☐ Calendar & Email Management  
☐ Document Creation  
☐ Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Preferred Working Style**

* Preferred hours of communication: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Time zone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Preferred method of communication: ☐ Email ☐ WhatsApp ☐ Zoom ☐ Other: \_\_\_\_\_\_\_\_\_\_
* Turnaround time expectations: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Key Goals / Pain Points**

Please describe the top 2–3 things you need help with or hope to achieve:

**Additional Notes or Requests**