

Initial Client Consultation Questionnaire

Date/Time of Consult: _____

Prospect Name: _____

Company: _____

Industry: _____

Phone: _____

Email: _____

Website: _____

Research Findings: _____

General Questions

Can you tell me a little about your business?

How did you get into this industry?

How long have you been in business? _____



What are your goals for your business in the next six months? The next year?

Have you worked with a VA in the past? _____

If yes, how was the experience? What did you like and not like about it?

What do you find most challenging in running your business?

Do you know specifically what you'd like to get off your plate or do you need some help in developing a delegation list?

1.	I want to be in control of how much money I make.	YES	NO
2.	I want to be in control of how much time I work.	YES	NO
3.	I want independence – to be my own boss and answer to myself (and my clients).	YES	NO
4.	I am self-motivated.	YES	NO
5.	I am disciplined.	YES	NO
6.	I am good at making decisions and implementing them.	YES	NO
7.	I believe that being a VA is more than an assistant. Rather, a collaborative relationship between me and my clients.	YES	NO
8.	I do not need to be tasked. I can analyze the situation and recommend next-steps to my client.	YES	NO
9.	When I have a good idea or notice an opportunity, I seize it.	YES	NO
10.	I am confident in my skills and would be comfortable marketing them.	YES	NO
11.	I handle change very well.	YES	NO
12.	I believe in the value of life-long learning.	YES	NO
13.	I have the initiative to get out there and network (online or in person).	YES	NO
14.	I believe in the value of having a mentor or a coach.	YES	NO
15.	My family is (or will be) supportive of my decision to be a VA.	YES	NO
16.	I always finish what I start.	YES	NO
17.	I work very well by myself without supervision.	YES	NO
18.	I am organized enough to manage my tasks and prioritize my time.	YES	NO

19.	I have the financial reserves to help with the creation of my business.	YES	NO
20.	I have a home office or quiet, uninterrupted space to work.	YES	NO
21.	I have the appropriate computer equipment and software or I have the resources to purchase them.	YES	NO
22.	I like to learn new things and new ways of working.	YES	NO
23.	I listen very well and can take on projects with very little instruction.	YES	NO
24.	I am very detail oriented and understand the importance of checking my work.	YES	NO
25.	I am comfortable asking questions if I am unsure of how to complete a task.	YES	NO
26.	I understand and am prepared to stay current with my skills and technology.	YES	NO

SCORING: Every “Yes” is worth 1 point. Every “No” is worth 0 point. The more points you have, the more ready you are to become a Virtual Assistant!