



Client Assessment Form

Client Name:

Date:

In order to have a better overview of you and your company, please let us know the following:

Section 1 – About yourself

What are your goals/what are you looking to accomplish?

If you had one thing to change, what would that be?

How would you best describe yourself?

What is your learning style?

Section 2 – About your work day

What are the usual tasks that you take care of daily?

What tasks or activities take up most of your time?

Which tasks do you enjoy the least?

Section 3 – About your business

What type of business do you have?

Do you have standard office hours?

What is your preferred method of contact?

Do you have an assistant at this time?

Have you ever worked with a Virtual Assistant?

What do you enjoy the most about your line of work?

What do you like the least about your line of work?

Section 4 – About the type of tasks you need assistance with...

Administrative	Article Submissions	Bookkeeping
Calendar Management	Consulting	Copy Writing
Databases	Desktop Publishing	Editing / Proofreading
Email/Voice Mail Management	Event Planning	Fax broadcasting
Ghost Writing	Human Resources	Incorporation
Internet Research	Marketing	Medical & Law Offices
Multimedia Presentations	Newsletters & Blogs	OCR
Organization	Phone Message Broadcasting	Press Releases
Real Estate Assistance	Scanning	Search Engine Optimization
Spreadsheets	Surveys / Polls	Transcription
Travel & Planning	Website Design & Maintenance	Word Processing
Other:	Other:	Other:

Section 5 – About the type of tasks you do not enjoy doing...

Administrative	Article Submissions	Bookkeeping
Calendar Management	Consulting	Copy Writing
Databases	Desktop Publishing	Editing / Proofreading
Email/Voice Mail Management	Event Planning	Fax broadcasting
Ghost Writing	Human Resources	Incorporation
Internet Research	Marketing	Medical & Law Offices
Multimedia Presentations	Newsletters & Blogs	OCR
Organization	Phone Message Broadcasting	Press Releases
Real Estate Assistance	Scanning	Search Engine Optimization
Spreadsheets	Surveys / Polls	Transcription
Travel & Planning	Website Design & Maintenance	Word Processing
Other:	Other:	Other:

If you'd like, you may email or fax this assessment to us. We can also review the assessment during our free phone consultation.

To your success!!

Vivi Gonzalez

President

Real Estate Virtual Partners

Div. of Virtual Business Partners, Inc.