



CLIENT QUESTIONNAIRE

Welcome to AJL Business Secretarial Services, providing affordable off-site office administrative support for busy people. Please print clearly your information below in the spaces provided. Be specific about any unique formatting requirements and details pertaining to your project. Upon completion please return to the attention of Barbara Gilbert by Fax at 1-888-841-7205; or Email at ajl1bizservices@rogers.com. Thank you.

Business Information

Name: _____

Company: _____

Address:

Street, City, Prov.

Postal Code

Phone: _____

Fax: _____

URL: _____

Email: _____

About You

Type of Business: (circle)

Business Professional Proprietorship Partnership Consultant Corporation Retail

Speciality: _____

Describe briefly typical daily workday activities:

How can AJL Business Secretarial Services help you?

What administrative tasks take up your time most when you want focus on other priorities?

Please indicate what services you require:

- _____ Bookkeeping: company set-up, general journal entries, bill payments, invoicing, budget monitoring and tracking
- _____ Calendar Management: appointments, reminder services.
- _____ Client Management: maintaining my database; mass mailing/emailing, follow-ups, taking orders.
- _____ Document Preparation: correspondence, minutes transcription, reports, presentations, document conversion to PDF, document scanning, forms and templates design.
- _____ Database/Spreadsheet: development and maintenance (data input).
- _____ Desktop Publishing: brochures, flyers, newsletters, advertisements, greeting cards, announcements.
- _____ Meeting Arrangements: Invite attendees, reserve meeting room, catering, distribute documents, arrange teleconferencing calls.
- _____ Policies and Procedures Development: including process mapping.
- _____ Travel Arrangements: Air fare, hotel, transportation.

I want administrative assistance from AJL Business Secretarial Services because:

- _____ I don't have enough time in my work day to get everything done.
- _____ I have too many interruptions during my work day.
- _____ I work out of a home office and don't have enough room for another workstation.
- _____ I don't want to take work home with me to work on in the evenings and on weekends.
- _____ I would like an administrative assistant but cannot employ a full-time employee.

Do you currently have administrative support staff? Yes No

Project Details, Deadlines, and Special Formatting Requirements:

(Please continue on a blank sheet, if necessary, and include it with your fax or email.)

I hereby confirm that all information provided on this form to be true and not to be misconstrued as fictitious in any way. _____ (Initial)