



NEW ORGANIZING CLIENT FORM

This form is for new and prospective clients of **InnerSpaces by Karen** professional organizing service (www.InnerSpacesbyKaren.com), who have the option of filling this out before our first meeting. If not, we can fill it out together. If you do choose to fill it out beforehand, please email it to me. This is not required, and you don't have to complete all of it. It just helps give us a head start (therefore saving you money!) and helps us both clarify what needs to be done, and how best to do it.

If you are *not* a prospective or new client of mine, you are free to use this form for yourself, to help clarify your own organizing needs, but please do not post it on any website. If you forward it to anyone, please include this introduction. Anyone with questions can email me at karenjpiece418@gmail.com.

<i>(Please Print)</i>								
					Today's Date:			
GENERAL INFORMATION								
Last Name:		First:	Middle:	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs.	<input type="checkbox"/> Miss <input type="checkbox"/> Ms.	Marital status: Single <input type="checkbox"/> Mar <input type="checkbox"/> Div <input type="checkbox"/> Sep <input type="checkbox"/> Wid <input type="checkbox"/>		
Street Address:			P.O. Box:	Home Phone ()		<input type="checkbox"/> Day <input type="checkbox"/> Eve		
City:			State:	ZIP Code:	Cell Phone ()		<input type="checkbox"/> Day <input type="checkbox"/> Eve	
Occupation:		Employer:			Work Phone ()		<input type="checkbox"/> Day <input type="checkbox"/> Eve	
Email address:								
Referred by (Please check one box):								
<input type="checkbox"/> Family		<input type="checkbox"/> Friend		<input type="checkbox"/> Internet		<input type="checkbox"/> Yellow Pages	<input type="checkbox"/> Other	
What type of service are you looking for:		<input type="checkbox"/> Consultation		<input type="checkbox"/> Hands-On Organizing		<input type="checkbox"/> Gift Certificate		<input type="checkbox"/> Other
Type of Home:		<input type="checkbox"/> House		<input type="checkbox"/> Condo		<input type="checkbox"/> Apartment		<input type="checkbox"/> Other
Home Office:		<input type="checkbox"/> No <input type="checkbox"/> Yes		If so, is this your primary place of work?		<input type="checkbox"/> Yes <input type="checkbox"/> No		
Who lives with you, and will we be organizing his/her stuff as well?								
<i>NOTE: Anyone else whose space is being affected (i.e. family member) should be present for the Initial Consultation.</i>								
Do you have Pets:		<input type="checkbox"/> Dog(s)		<input type="checkbox"/> Cat(s)		<input type="checkbox"/> Other		
IN CASE OF EMERGENCY								
Name of local friend or relative (not living at same address):			Relationship:		Home Phone ()		Work Phone ()	

ROOMS TO BE ORGANIZED

<input type="checkbox"/> Living Room	<input type="checkbox"/> Den/TV Room	<input type="checkbox"/> Dining Room	<input type="checkbox"/> Kitchen	<input type="checkbox"/> Laundry Room/Mud Room	<input type="checkbox"/> Craft/Hobby Room
<input type="checkbox"/> Bedrooms (#)	<input type="checkbox"/> Bathrooms (#)	<input type="checkbox"/> Closets (#)		<input type="checkbox"/> Home Office	
<input type="checkbox"/> Basement	<input type="checkbox"/> Attic	<input type="checkbox"/> Garage	<input type="checkbox"/> Other		

What are your dreams and wishes for each of the rooms you want organized in your house? Not just what is done or stored in each room but what you want to do or store in there and what sorts of qualities you want the rooms to possess?

- Simple/Functional
 Decorative/Detailed
 Beautiful/Collectibles

OTHER AREA(S) TO BE ORGANIZED

What other types of items are you having the biggest problem organizing? (Add or modify as desired)

<input type="checkbox"/> Paperwork (mail, bills, records)	<input type="checkbox"/> Magazines/newspapers	<input type="checkbox"/> CDs &/or DVDs	<input type="checkbox"/> Books	<input type="checkbox"/> Photos, Memorabilia &/or Art
<input type="checkbox"/> Clothing	<input type="checkbox"/> Toys or Games	<input type="checkbox"/> Hobby supplies	<input type="checkbox"/> Food (cabinets, refrigerator)	<input type="checkbox"/> Kitchen gadgets
<input type="checkbox"/> Other				

PROBLEMS & CONCERNS

Which would you like to focus most on? (Add or modify as desired)

<input type="checkbox"/> Clutter Control	<input type="checkbox"/> Purging	<input type="checkbox"/> Storage	<input type="checkbox"/> Computer/Digital Clutter	<input type="checkbox"/> Paper Flow & Management
<input type="checkbox"/> Sorting & Filing	<input type="checkbox"/> Financial	<input type="checkbox"/> Work Flow	<input type="checkbox"/> Goals & Deadlines	<input type="checkbox"/> Time Management
<input type="checkbox"/> Project Management	<input type="checkbox"/> Records Management	<input type="checkbox"/> Planning	<input type="checkbox"/> Priorities	<input type="checkbox"/> Procrastination
<input type="checkbox"/> Central Communication Center	<input type="checkbox"/> Streamlining processes for maintaining order		<input type="checkbox"/> Finding purpose/direction for space(s)	
<input type="checkbox"/> Other				

ORGANIZATIONAL CHALLENGE

"X" as many as apply, but BOLD those that are most important. (Add comments or modify as desired)

<input type="checkbox"/> I have too much stuff.	<input type="checkbox"/> I don't have enough space to work with.	<input type="checkbox"/> I don't have enough storage space.
<input type="checkbox"/> Getting rid of stuff stresses me out.	<input type="checkbox"/> Not enough stuff has been assigned a "home."	<input type="checkbox"/> I just never got into the habit of maintaining an organized space.
<input type="checkbox"/> I have a sentimental attachment to lots of my stuff.	<input type="checkbox"/> I don't know how to decide what goes where.	<input type="checkbox"/> I have an uncooperative partner/children who are working against me.
<input type="checkbox"/> I don't want to go through my things because of the emotional issues they will trigger.	<input type="checkbox"/> Organizing is boring! There are so many things I'd rather be doing.	<input type="checkbox"/> I don't want to step on my partner's/parent's/roommate's toes.
<input type="checkbox"/> I don't even know what I have.	<input type="checkbox"/> I get discouraged by the enormity of the job.	<input type="checkbox"/> I am passive-aggressively resisting my partner's efforts to change me.
<input type="checkbox"/> I don't have time to put things away.	<input type="checkbox"/> I start organizing but get distracted, and nothing gets finished.	<input type="checkbox"/> I have a pet(s) to whom I am very attached, who creates chaos or mess.
<input type="checkbox"/> I'm too tired or physically ill to do the work required.	<input type="checkbox"/> I've been waiting for something (having more money, getting a bigger place, having more free time, kids moving out, etc) before I get organized.	<input type="checkbox"/> Other

ASSESSMENT QUESTIONS

(Add or modify as desired)

What is working well in your home/office? What is not working?

In what ways do you think you may have benefited, or imagined yourself benefiting, from being disorganized? (For example, you gain a sense of control over your belongings if only you know where things are. Or you can avoid the difficult task of addressing your social anxiety because the house is too messy to have people over.)

How has being disorganized negatively affected your life?

Have you tried to get organized in the past?

How do other members of your family/staff feel about your efforts to get organized?

What is motivating you to get organized now? How do you know you're ready to make the change now?

What will being organized give or do for you, in your life?

What do you think you will be able to do once you are organized, that you believe you can't do now?

What time of day are you generally most and least productive?

What motivates you to get going on a project? (Music, Scented Candles, Comfy Clothes, Friends)

What tends to slow you down?

Do you use a planner, calendar, and/or PDA to keep track of your time?

Do you prefer hidden or visible storage systems? Why?

What's your learning style? How do you learn best? Visual Auditory Kinesthetic

Do you have any particular problems (organizational, mental, emotional, physical) **or concerns about the process that you would like to tell me about before we work together?**

Do you have any special needs or medical challenges I should know about? (Allergies, Back Problems, etc.)

How soon do you want to get started working on your project(s)? Now! 3 months 6 months 9 months 1 year

Do you have a budget in mind? \$

FEE SCHEDULE

Because all situations are different and everyone's needs vary, I will customize my services to fit your lifestyle. Time estimates are based on complexity, scope, and materials used in accomplishing our mutual goal. Most jobs take no more than a total of 10-hours although some can be shorter and some longer depending on each unique situation.

- 1) Initial phone consult to determine the scope of the job.
- 2) First meeting with client is a walk-thru with needs assessment. Takes approximately 30 minutes followed by de-cluttering one area for any remaining appointment time.
- 3) I will e-mail a contract to sign with our agreed schedule for future sessions plus written detail of what you (the client) should accomplish before our next session so we can complete the task within the remaining hours.
- 4) At the end of our contract sessions, I will provide a list of the remaining rooms to be organized, noting the approximate hours needed to complete the task.

Needs Assessment

1/2 hour - \$50

Your organizational journey begins with a New Client Form and a free 30-60 min personal consultation. I will evaluate your current situation, determine the source of your organizing challenges, gain an understanding of your habits, and discuss your goals. Together we will find solutions that fit your needs.

Organizing Sessions

\$75 / hour

Organization sessions are sold in 3-hour increments at \$75 per hour and are pre-paid.

A \$100 deposit is required to begin your project. Payment will be due after each session including any items you have authorized for use in completing your project (i.e. baskets, containers, etc.).

Packages of multiple sessions are also available at a discounted rate. Packages must be paid in advance:

- 10hr package = 5% discount \$712.50
- 20hr package = 10% discount \$1,350.00
- 30hr package = 15% discount \$1,912.50
- 40hr package = 20% discount \$2,400.00

If payment is not made within 30 days of Invoice, a 5% finance charge will be incurred which will increase monthly until Invoice is paid. Any returned check will be charged a \$30 service fee.

Either party has the right to terminate the relationship at any time; however, payment is due immediately for any outstanding work done and previously agreed upon by the client.

Consulting Services

\$50 / hour

If you don't mind putting in some sweat-effort but are not sure how and where to start, I offer both phone and e-mail consultations with expert advice and guidance. It's an easy and cost effective way to gain valuable organizing tips. Plus...if you are outside my geographic area, this is a great way to get the benefit of a professional organize in the "privacy of your home"!

Sometimes we all get too busy to keep up with the new systems. I can return to help you maintain your progress. Weekly, monthly, semi-annual, and annual services are available to keep your home/office as organized as it was the day your project was completed.

Additional Services

- * Home & Office Management (i.e. technical support, database management, etc.) \$70/hour
- * Personal Assistant (i.e. corresponding services, filing, email, travel, bookkeeping, etc.) \$50/hour
- * Donation drop off \$30 per trip
- * Shopping for storage/organizational tools \$30/hour

Personal Photo Organizer

\$50 / hour

Do you take a lot of photos? Could you use help getting your photos from your digital camera to your computer? Are your images organized in beautiful albums? I provide solutions for both digital and traditional photo needs including one-on-one coaching, photo organization, and albums for hire (creating digital or traditional photo albums) \$50/hour plus supplies

Speaking Engagements

Organization is a universal topic and something that benefits everyone.

HERE'S WHAT YOU CAN EXPECT FROM ME

- ❖ I will be on time. If I'm not your first 30 minutes is free!
- ❖ I do not need to be fed. I will bring my own snack. I am there to give you my undivided attention, and to apply my knowledge of organizing principles and products to your specific situation.
- ❖ I will work with you, not for you. While we work together you will learn new (or reinforce existing) organizing skills.
- ❖ Hands-on organizing sessions are 3 hours minimum.
- ❖ Travel time is complimentary up to 30 miles each way.
- ❖ I will not throw anything out without your permission. Together we will identify what you use, love, and want to keep. Then we'll decide what to do with the rest (i.e. donate, sell, give away, toss). I help you make decisions, but the final decision is yours.
- ❖ I will keep your personal information confidential. I follow the NAPO Code of Ethics, which can be found on www.napo.net.
- ❖ I may ask to take photos of your space. This serves three purposes: 1) photos remind me of areas I need to address in your customized written plan; 2) before and after photos demonstrate progress and serve as motivation; 3) with your permission, I may use the photos in my marketing materials.
- ❖ I am fully insured. Thus I am not responsible for any loss or damage resulting from the discarding or destroying of any records or personal effects.
- ❖ Here are some factors that affect how long a job will take: How much work you are willing/able to complete on your own time; the size and accessibility of the space to be organized; the level of organization needed; the number of interruptions (i.e. telephone, children); your willingness to make quick decisions, etc.

HERE'S WHAT I EXPECT FROM YOU

- ❖ Perfection.....just kidding!!! ☺
- ❖ Don't clean up before I get there. I need to see you living in your "natural habitat" in order to help you most effectively.
- ❖ A hands-on organizing session will be easier if you are rested and have had something to eat. The work we do may, or may not, be very physically demanding, but you will be making a lot of decisions.
- ❖ Anyone else whose space is being affected (i.e. family member) should be present for the initial consultation.
- ❖ If you are late, the session will not be extended to make up the time.
- ❖ Please notify me by telephone 24 hours in advance if you need to reschedule.
- ❖ I am customarily paid at the end of each session. I accept cash, checks, and all major credit cards.
- ❖ You will be responsible for all related expenses associated with the project.
- ❖ Time spent shopping (if any) will be billed at an hourly rate.
- ❖ If you are delighted with my services, please refer me to your friends, family, neighbors, and colleagues!

THANK YOU!!!

Thanks for filling out this form! It will make the organizing process much more efficient and fun. It's best if you email it to me before our session, but you can also give it to me when I arrive. This form is always being improved and refined, so if you have any suggestions for changes to it, please let me know.

I'm looking forward to working with you on your organizing project.

PLEASE RETURN THIS FORM TO:

Karen Pierce – 11 Nettleton Avenue – Newtown, CT 06470
Email: karenjpierce418@gmail.com

The way I see it
Isn't necessarily
The way you see it
Or the way it is
Or ought to be.
What's more important
Is that we're all
Looking for it
And a way to see it.



Karen Pierce
karenjpierce418@gmail.com
www.innerspacesbykaren.com
(203) 470-6969



The Organizing Authority®