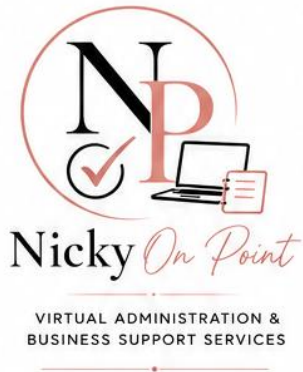




FREE CONSULTATION

Discovery Call Form

FREE BUSINESS CONSULTATION



FREE
CONSULTATION



BUSINESS
REVIEW



SERVICE
PLANNING



NO
OBLIGATION



CLIENT INFORMATION

Business Name:

Contact Name:

Email Address:

Phone Number:

Preferred Contact Method:

☐ Email

☐ Phone

☐ Messenger

☐ Zoom / Teams

☐ Other:



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VIRTUAL ADMINISTRATION &
BUSINESS SUPPORT SERVICES

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CONSULTATION



BUSINESS
REVIEW



SERVICE
PLANNING



NO
OBLIGATION



BUSINESS INFORMATION

Industry:

Number of Staff:

Business Location:

How long have you been operating?



SERVICES OF INTEREST

- ☐ Email Management
- ☐ Calendar Management
- ☐ Social Media Management
- ☐ Invoicing & Administration
- ☐ Document Organization
- ☐ Data Entry
- ☐ Project Coordination
- ☐ Event Coordination
- ☐ Other:



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CURRENT CHALLENGES

What admin tasks take up most of your time?

What tasks would you most like to delegate?



CURRENT SYSTEMS

Email Platform:

- ☐ Microsoft 365
- ☐ Gmail
- ☐ Xtra
- ☐ Other:

Calendar Platform:

- ☐ Outlook
- ☐ Google Calendar
- ☐ Other:

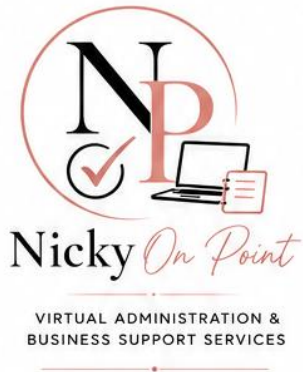
Accounting Software:

- ☐ Xero
- ☐ MYOB
- ☐ QuickBooks
- ☐ Excel
- ☐ Other:



SOCIAL MEDIA (IF APPLICABLE)

- ☐ Facebook
- ☐ Instagram
- ☐ LinkedIn
- ☐ TikTok



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NO
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☐ Other:



BUSINESS GOALS

What would success look like for you over the next 3–6 months?



ADDITIONAL NOTES

Thank you! ♥



Nicky On Point
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info@nickyonpoint.com



027 307 4535



www.nickyonpoint.com



Ashburton, New Zealand



*Helping busy
business owners
reclaim their time.*