

# Client Call Note Sheet

Client Name \_\_\_\_\_

Social Handle \_\_\_\_\_

Business Name \_\_\_\_\_

Website \_\_\_\_\_

Client Email \_\_\_\_\_

Date of Call \_\_\_\_\_

What do they sell?

Key problem they’re having right now?

Why did they reach out to me?

Services needed / deliverables needed

Budget

Other Notes

Timeline

Post-Call Checklist

☐ Send proposal

☐ Send follow-up