**Client intake form**

*You can create a form for potential clients to submit on your website or you can send them a form via email and ask for them to respond the same way.*

*The referral mentioned in the opening paragraph helps the author feel like you’re not just going to say, “Sorry, have a nice life!” If a potential client comes to you with a project that is not in a genre you edit but you don’t know anyone who does edit that genre, try the Editors Database at* [*www.developmentaleditors.com*](http://www.developmentaleditors.com)*. All of these editors are experienced editors I’ve either worked with or who have completed the Club Ed Certificate Program.*

Dear [THEIR NAME],

Thank you for considering [YOUR NAME] for your editing needs!

Please take a moment to reply to the following questions. They’ll help me determine if we’re a good fit for working together. If not, I may be able to refer you to someone who can be of more assistance.

1. Primary contact’s name, phone number, email address. Are you the final decision maker for this project? If not, who is?
2. Working title for your project?
3. Genre?
4. Word count? Is the ms complete or still in progress? If in progress, how far along are you?
5. Is this your first novel [book for nonfiction]?
6. For nonfiction, have you written the book proposal for your book?
7. Have you been previously published? Traditionally or self-published?
8. What are your goals for this book/novel?
9. What would be your measure of success for this book/novel?
10. Who is your target audience?
11. What kind of help are you looking for? [Name the services you offer here—for example, coaching, proposal writing/editing, developmental editing, etc.]
12. Do you have any specific problems with your ms that you need help with?
13. In 200-300 words, describe what your story/project is about.
14. What is your timeframe for making a decision and scheduling the edit? (Now, 2-3 months, next six months?)
15. Do you have a budget in mind for this project?
16. Is there anything else you’d like me to know?

Email me with any questions you have! [YOUR EMAIL HERE]