

WELCOME KIT

Welcome Kit



How to get the most out of your NAPO membership.

Resources for getting started as a professional
organizer or productivity consultant.



National Association of
Productivity & Organizing
Professionals

Introductory and Sample Forms

Starting your own professional organizing and productivity business can feel overwhelming at first, especially if you don't know where to begin. As a NAPO member, you have access to exclusive opportunities for education, unlimited resources, and a network of your peers that will help you and your new business grow and prosper.

Included in this New Member Kit:

- **Client Tracking Form** can be used to track your hours, client interactions, income, and mileage. It will give you a quick, at-a-glance overview of how many hours you work each month, with which clients you meet most frequently, and where the majority of your referrals come from. The Client Tracking Form can also be edited to add columns for additional information you wish to track for your business.
- **Sample Invoice** a simple, editable invoice template, that allows you to easily insert your logo and add your company information.
- **Client Intake Form** gives you several basic questions to ask new clients at the beginning of a new project. All fields can be modified to suit your company needs.
- **Sample Terms of Agreement** gives you an outline of your expectations for your client and what your client can expect from you. With room for a signature, and the ability to add or remove terms from the agreement, it gives you a great start for designing your own customized Terms of Agreement.
- **Annual Business Expenses and Chart of Accounts** gives you the ability to calculate your yearly expenses, broken down into categories, for tax purposes and for creating (and sticking to) a sound budget.

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Client Intake Form Sample

When you are contacted by a potential client, you will want to gather information that will help you assess their needs and ultimately work well with your client.

Contact information

Name
Address
Email address
Home/work phone/cell phone
Preferred method and time of day to contact

Residential intake

What prompted you to contact me?
Have you felt disorganized for a while?
If so, how long?
What situations have occurred in your home?
(New family member, recent move, downsizing, illness or another life-changing event)
Do you live with others?
How long have you lived in your home?
(Apartment, single-family home, townhouse, etc.)
Do you rent or own?
What areas require assistance?
Do you have a home office?
If so, what is it used for?
Has your struggle with clutter been throughout your life or has a recent situation created clutter?
Do you struggle with papers and filing?
What organizing tools do you currently use?
Do your children struggle with organization?
Do you struggle with time management issues?

General

What are your best hours to work?
How frequently do you want to work?
Do you have a budget?
Do you have a time-frame in mind?

Business intake

What prompted you to contact me?
What type of work do you do?
How long have you been in this position and with this company?
What type of time management system and planner do you use?
How are your paper management skills?
Do you keep a list? What kind?
What are your goals in hiring a productivity coach or professional organizer?
What challenges has your disorganization created?
What are some of the negative outcomes that you have experienced from being disorganized?
How does this affect people you work with?
What are your challenges with technology?
Are you able to work on your desk?
What is it you want that you don't have?
Do you prefer to work virtually or on-site?
If on-site, where are you located?

INSERT YOUR LOGO HERE

**SAMPLE
Terms of Agreement**

- 1 (YOUR COMPANY) performs_____services at the fee of \$____for a 3-hour session. Additional time may be booked at \$____per hour. Sessions of (insert #) hours or more are scheduled for an additional ½ hour to include a 30-minute unpaid meal break. Design time and time exceeding scheduled sessions will be billed in ¼ hour increments at the corresponding hourly rate. All on-site work is booked with 3-hour minimums.

- 2 Travel of 60 minutes round trip is included in the above fee. Travel charges will be applied when travel exceeds 60 minutes round trip.

- 3 Proper consideration regarding cancellations and appointment changes is expected. Appointments canceled within 48 hours of a scheduled appointment time are subject to a cancellation charge of 50% of scheduled work.

- 4 Clients are asked to remove and secure firearms and other "private" personal items from work areas before work begins.

- 5 Shopping for organizing products and donation drop off can be provided by (YOUR COMPANY). We are also happy to make recommendations and/or arrangements for trash removal or shredding services. Time will be billed at the hourly rate. Client agrees to reimburse (YOUR COMPANY) for authorized expenses.

- 6 Suggestions regarding procurement and/or retention of legal, financial, and accounting documents may be made by the organizer to expedite the organizing process. However, all final decisions regarding these documents should be made by your personal CPA, Attorney or Financial Advisor.

- 7 (YOUR NAME) is a member of the National Association of Productivity & Organizing Professionals (NAPO) and bound by their Code of Ethics. Any physical or verbal content expressed during the project will remain confidential and will not be shared with outside parties, unless required by law or with express consent.

- 8 Payment for packaged services and virtual organizing is to be made prior to our first session. Credit cards are accepted through PayPal or you may send a check. On-site sessions not paid in advance by credit card are to be paid at time of service via check or cash.

Client's Signature | Date

Your Signature | Date

INSERT YOUR LOGO HERE

Invoice

Client: _____ **Date:** _____

Service	Amount
Total Due:	\$

Notes:

Thank you!

Please make checks payable to (your company name)

Address

web ••• phone ••• email

Client tracking form

(Insert Year)

Month	Clients	Consultation dates	Income by client		Income Cumulative	Client source	Mileage
January	Smith	Jan 1,2,3	\$100.00	pd		web	20
	Jones	Jan 3,4,5	\$100.00	pd		referral	20
	Morris	Jan 10,12,14	\$100.00	pd		speaking	20
	January total		\$300.00		\$300.00		
February	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	February total		\$300.00		\$600.00		
March	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	March total		\$300.00		\$900.00		
April	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	April total		\$300.00		\$1,200.00		
May	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	May total		\$300.00		\$1,500.00		
June	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	June total		\$300.00		\$1,800.00		
July	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	July total		\$300.00		\$2,100.00		
August	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	August total		\$300.00		\$2,400.00		
September	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	September total		\$300.00		\$2,700.00		
October	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	October total		\$300.00		\$3,000.00		
November	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	November total		\$300.00		\$3,300.00		
December	Smith		\$100.00	pd		web	
	Jones		\$100.00	pd		referral	
	Morris		\$100.00	pd		speaking	
	December total		\$300.00				

Annual Business Expenses

														total
Auto mileage and repair	\$20.00													\$20.00
Books														\$0.00
Contributions														\$0.00
Professional Development														\$0.00
Technology														\$0.00
Meals														\$0.00
Memberships														\$0.00
Misc/flowers														\$0.00
Office supplies														\$0.00
Postage														\$0.00
Repairs														\$0.00
Software														\$0.00
Subscription														\$0.00
Travel Accommodations														\$0.00
Travel														\$0.00
TOTAL	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00