Klarstig

Sales Insurance Donor Intake

FICTIONAL EXAMPLE FOR ILLUSTRATION. NAMES, ADDRESSES AND NUMBERS ARE INVENTED.

Gather the information needed to start a new relationship or case. Focus on the person's goals, practical needs and the next step.

Contact and reference

Organization using this document

Maple Street Community Center

Your name or contact reference *

Alex Rivera

Email for a reply if needed

alex.rivera@example.com

Information for this document

Reason for contacting or joining the organization *

I helped at my school food drive last spring and enjoyed it. I would like to give a few hours each week and get to know my neighbours.

Main goals or needs *

Reach more local families this year and support a youth reading program with visible community results.

Relevant background

(Free-text answer - not filled in for this example)

Desired timing

(Short answer - not filled in for this example)

Practical constraints or access needs

(Free-text answer - not filled in for this example)

Previous contact or existing reference

REF-2026-0148

Preferred next step

Meeting

Specific details

Giving interests or donor relationship reference

Complete when relevant to this request.

REF-2026-0150

Preferred involvement and communication expectations

(Free-text answer - not filled in for this example)

Operating context

Policy service or case reference

Complete when relevant to this request.

Operations

Relevant dates evidence and authorized review contact

Photos of the entrance (3), the November sign-in sheets and the maintenance ticket MT-2026-0142.

Team specific details

Account opportunity or sales owner

Complete when relevant to this request.

Operations

Customer needs buying stage commitments and next agreed contact

(Free-text answer - not filled in for this example)

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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