

# Needs Assessment Template

by

Angela Esnouf, The Professional Organiser's Edge  
for Intro to Your Professional Organiser Career

*Intro to*  
*Your Professional Organiser*  
*Career* 

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# Discussion

Name		
Date	Phone	
Address		
Email		
Preferred Mode of Contact		
Main Purpose for Call		
Notes		
Key Words		
Other People in Household		
Name	Relationship	How will they be involved?

Personal Circumstances e.g. Bereavement, Relevant Medical History, etc.	
What is working well?	
What is not working well?	
Solutions tried in the past? Successful? Unsuccessful?	
Reasons for success or not?	
Deadline or Timeline Expectations	
Budget & Relevant Funding Sources e.g. NDIS, self-funded, ongoing/fixed?	
Possible Causes of Disorganisation	
Bin Collection Day	Hard Rubbish Collection Details e.g. Which municipality? Allocation used?

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# On Tour

Details of Premises	
Number of Rooms	Outdoor Spaces

Room	Size
Notes	

Room	Size
Notes	

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# Recommendations

Broad Observations
Starting Point
Recommended Timeline
Overall Plan
Quick Win
Other Resources & Services Required
Agreed Next Steps

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