



JC Hanna Group, LLC
Strategic Human Capital Management Client Intake Form

Date: _____ Legal Business Name: _____

DBA (if applicable): _____

Primary Contact: _____ Title: _____

Business Address: City: _____ State: _____ Zip: _____

Business Phone: _____ Cell Phone: _____

Email Address: _____ Website: _____

Preferred Method of Communication: ☐ Phone ☐ Email ☐ Text Message

COMPANY INFORMATION

Business Structure

☐ Sole Proprietorship ☐ Partnership ☐ LLC ☐ Corporation ☐ S-Corporation ☐ C-Corporation

☐ Nonprofit ☐ Government ☐ Other _____

Industry _____

Year Business Established _____ Federal EIN _____

State(s) of Operation _____

Number of Locations _____

Number of Employees ☐ 1–10 ☐ 11–25 ☐ 26–50 ☐ 51–100 ☐ 101–250 ☐ 250+

Number of Independent Contractors _____

Union Workforce? ☐ Yes ☐ No Remote Employees? ☐ Yes ☐ No

Hybrid Workforce? ☐ Yes ☐ No

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Current HR Structure

Do you currently have an HR Department? ☐ Yes ☐ No

Current HR Contact _____

Current HRIS/Payroll System

☐ ADP ☐ Paychex ☐ UKG ☐ BambooHR ☐ Paylocity ☐ Gusto

☐ iSolved ☐ Rippling ☐ Other _____

Do you have an Employee Handbook? ☐ Yes ☐ No Last Updated _____

Services Requested

Human Resources Management

☐ Fractional HR Services ☐ HR Department Startup ☐ HR Compliance Review

☐ HR Audits ☐ HR Strategy Development ☐ HR Policies & Procedures

☐ Employee Handbook Development ☐ HR Forms Development ☐ Job Descriptions

☐ Organizational Charts ☐ Performance Management ☐ Employee Relations

☐ Workplace Investigations ☐ Progressive Discipline ☐ Terminations

☐ Exit Interviews ☐ Personnel File Audits

Recruitment & Talent Acquisition

☐ Recruitment Strategy ☐ Job Posting ☐ Applicant Tracking ☐ Resume Screening

☐ Interview Coordination ☐ Background Checks ☐ Reference Checks

☐ Offer Letters ☐ New Hire Onboarding ☐ Orientation Programs

Compensation & Benefits

☐ Compensation Analysis ☐ Salary Benchmarking ☐ Pay Structure Development

☐ Benefits Administration ☐ Open Enrollment Assistance

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☐ Leave Administration (FMLA, ADA, etc.)

Compliance

☐ FLSA Compliance ☐ EEO Compliance ☐ OSHA Compliance ☐ I-9 Audits

☐ Employment Law Compliance ☐ Wage & Hour Compliance

☐ Recordkeeping Compliance ☐ Harassment Prevention ☐ Policy Development

Training & Development

☐ Leadership Development ☐ Supervisor Training ☐ HR Compliance Training

☐ Sexual Harassment Prevention ☐ Customer Service Training

☐ Diversity & Inclusion Training ☐ Conflict Resolution ☐ Performance Coaching

Additional Consulting

☐ Organizational Development ☐ Change Management ☐ Workforce Planning

☐ Succession Planning ☐ Employee Engagement ☐ Retention Strategies

☐ HR Metrics & Analytics ☐ Executive Coaching

Current Challenges

What HR challenges are you currently experiencing?

☐ High Employee Turnover ☐ Recruiting Difficulties ☐ Employee Performance Issues

☐ Attendance Issues ☐ Employee Relations ☐ Compliance Concerns

☐ Leadership Development ☐ Payroll Issues ☐ Benefits Administration

☐ Poor Documentation ☐ Lack of Policies ☐ Safety Concerns

☐ Low Employee Morale ☐ Workplace Conflict ☐ Other _____

Describe your biggest HR concern:

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Employee Information

Total Employees _____ Full-Time _____ Part-Time _____ Seasonal _____

Temporary _____ Independent Contractors _____

Average Annual Turnover Rate _____ %Current Vacancies _____

Recruitment

Average Number of Positions Filled Annually _____ Average Time to Fill Positions _____

Biggest Recruiting Challenges _____

Policies and Compliance

Please indicate whether the following are currently in place.

Policy	Yes	No
Employee Handbook	☐	☐
Attendance Policy	☐	☐
PTO Policy	☐	☐
Code of Conduct	☐	☐
Anti-Harassment Policy	☐	☐
Workplace Violence Policy	☐	☐
Drug-Free Workplace Policy	☐	☐
Progressive Discipline Policy	☐	☐
Performance Evaluation Process	☐	☐
I-9 Compliance	☐	☐
OSHA Compliance Program	☐	☐

Goals

What are your top business goals over the next 12 months?

1. _____

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2. _____

3. _____

What would make this consulting engagement successful? _____

Current Providers

Payroll Provider _____ Benefits Broker _____

Workers' Compensation Carrier _____

Employment Attorney _____

CPA/Accounting Firm _____

Documents Requested & Billing Information

Please provide copies of the following, if available.

- | | | |
|--|--|--|
| ☐ Employee Handbook | ☐ Organizational Chart | ☐ Job Descriptions |
| ☐ Employee Census | ☐ Benefits Summary | ☐ Payroll Reports |
| ☐ I-9 Forms | ☐ Personnel Forms | ☐ Performance Evaluations |
| ☐ Employment Applications | ☐ Offer Letters | ☐ Disciplinary Forms |
| ☐ Safety Manual | ☐ Workers' Compensation Information | |
| ☐ OSHA Logs (if applicable) | ☐ Current HR Policies | ☐ Recruitment Process Documents |
| ☐ Training Materials | | |

Consulting Engagement

How did you hear about us? ☐ Referral ☐ Website ☐ LinkedIn ☐ Facebook

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☐ Google ☐ Chamber of Commerce ☐ Other _____

Preferred Meeting Schedule

☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ Quarterly

Preferred Meeting Format

☐ In-Person ☐ Virtual ☐ Phone

Client Certification

I certify that the information provided is accurate and complete to the best of my knowledge. I understand that the quality of HR consulting services depends on the accuracy and completeness of the information and documentation provided. I authorize JC Hanna Group LLC to use the information supplied solely for the purpose of evaluating, planning, and delivering human resources consulting services.

Authorized Representative (Print): _____

Title: _____ Signature: _____

Date: _____

For Office Use Only

- Date Received: _____
- Initial Consultation Completed: ☐ Yes ☐ No
- Proposal Sent: ☐ Yes ☐ No
- Service Agreement Executed: ☐ Yes ☐ No
- Client Onboarding Completed: ☐ Yes ☐ No
- Assigned HR Consultant: _____
- Project Start Date: _____
- Follow-Up Date: _____
- Notes:

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