Client onboarding questionnaire

Five short sections. Your answers help us start the work without a pile of follow-up emails. Skip any question that does not apply to you.

Questions marked * are required.

Completed by _____ Date _____

1 Your contacts

Why we ask: So questions, approvals and invoices reach the right person the first time.

1. **Your name ***

_____

2. **Your email ***

_____

3. **Company name ***

_____

4. **Who approves our work? ***

Tick one.

◯ I do ◯ Someone else

If you chose “Someone else” in question 4.

5. **Approver's name**

_____

If you chose “Someone else” in question 4.

6. **Approver's email**

_____

7. **Where should we send invoices? ***

_____

2 Your goals

Why we ask: So we aim at the result you care about, not the one we guess.

8. Which services did you hire us for? *

Tick all that apply.

- ☐ Website
- ☐ Paid ads
- ☐ SEO
- ☐ Social media
- ☐ Branding
- ☐ Other

9. What would a win look like 90 days from now? *

e.g. 20 more booked calls a month

10. Who are you trying to reach? *

Who they are, where they are and what they need

11. Name three competitors you admire, and say why

Names or links are fine

3 Your brand and files

Why we ask: So everything we make looks and sounds like you from day one.

12. Upload your logo

SVG, EPS or PDF files work best.

Attach your logo (up to 3 files)

13. **Upload your brand guidelines**

A PDF or slides, if you have them.

Attach your brand guidelines (up to 3 files)

14. **What colors and fonts do you use?**

Color codes and font names, if you know them

15. **Is there anything we should avoid?**

Words, colors, images or topics that are off limits

4 Accounts we may need

Why we ask: So we can ask for the right access early and avoid waiting on logins later.

> **Please do not type passwords here. Invite us as a user from each account's own settings.**

16. **Which of these accounts do you have?**

We will send you steps for each invite.

Tick all that apply.

- ☐ Google Analytics
- ☐ Google Search Console
- ☐ Google Ads
- ☐ Meta Business
- ☐ Website host
- ☐ Domain registrar
- ☐ CMS (where you edit your website)
- ☐ Other

If you chose "Other" in question 16.

17. **Which other accounts?**

If you chose "Website" in question 8.

18. What is your website built on?

Tick one.

- ◯ WordPress
- ◯ Webflow
- ◯ Shopify
- ◯ Squarespace
- ◯ Wix
- ◯ Custom build
- ◯ Not sure

If you chose "Paid ads" in question 8.

19. What is your monthly ad budget?

Tick one.

- ◯ Under $1,000
- ◯ $1,000 to $5,000
- ◯ $5,000 to $20,000
- ◯ Over $20,000
- ◯ Not set yet

If you chose "SEO" in question 8.

20. What SEO work has been done before?

Who did it, when, and what changed

5 Working together

Why we ask: So updates arrive the way you like and no deadline takes us by surprise.

21. How do you prefer to hear from us? *

Tick one.

◯ Email ◯ Slack ◯ Phone ◯ Video call

22. How often would you like an update? *

Tick one.

◯ Every week ◯ Every two weeks ◯ Every month

23. Are there any hard dates we need to know about?

Launches, events, sales or board meetings

24. **Is there anything else we should know?**

People to copy in, holidays, past projects that went wrong

Thanks, that's everything

We'll read your answers and send you a kickoff plan, with steps for each account invite.