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# Client Onboarding Questionnaire

**(Please fill in as many answers as possible)**

Organization/Company Name:

What products or services do you offer?

Main Contacts (Names/emails/phone numbers):

What is your preferred method of communication? Email, phone calls, video calls, slack, etc.?

**Marketing Goals:**

What are your marketing goals? (rank in order of importance)

What are your biggest marketing challenges?

What marketing initiatives are or have been successful in the past?

What marketing tools are you using?

What do you like and dislike about your current strategy?

What social media platforms are you currently using?

Who is your target audience? Please provide as much detail as possible.

Who are your top three competitors?

What are the competitive advantages and unique selling points of your organization?

**Branding Assets (provided by USB, Dropbox or Google Drive)**

Company colours/hex codes and preferred fonts

Company logo in colour, b/w, and transparent background (all file sizes)

Other company-images

Social post templates

**Technology Access** – Provide logins and passwords or grant access/permission to our email account.

Google Analytics:

Social Media Accounts:

Your CMS (website) login details: