

Onboarding Questionnaire (Strategic)

Information is a valuable asset.

When onboarding any client we need to gather information that is vital for the job we have been hired to do. Whether it is a strategic digital marketing blueprint, a new website or a full digital marketing campaign implementation, this information is crucial. Please take some time and fill out this questionnaire. All information is confidential and we guarantee that nobody except for your project team has access to this information. We will probably have more questions as we analyze the answers provided.

This questionnaire is hosted on a secure and encrypted website. Your information is safe.



Onboarding Questionnaire

Company Name	Address (Billing Address)	
<input type="text"/>	<input type="text"/>	
City	Province	Postal Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email:	Company Website URL	Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Basic Company Information
Basic Company Information

Contact Names with all contact data

Business Description

Please describe your business and what products and services you offer in as much details as necessary for us to understand what your business does. Include geographical markets you are operating in and other information as to training and experience of employees or owners.

Years in Business

Approximate Size of Business (Revenue & Employees)

Recent News & Events

Anything that is worthwhile to be mentioned on the website or in Social Posts

Key clients of the company

Company Name and Products or services they buy, This helps us tp better understand the target personas.

List of Products/Services offered

Define your target market(s)

What kind of business is your typical client. If there are several please list them all.

Common Keywords/Keyword Phrases used to search for your business.

If someone is looking for the products and services you offer, what keywords will they use to describe them?

Key Competitors with their websites

What are your company's Unique Selling Points (USP)

Why would somebody pick you over your competitors?

What are your core competencies? (What does your business do best?)

Are you better at providing certain services or products than others you may also offer?

What are your sources of growth?

New services, new markets, new target groups?

Have you, any of your employees or your organization, received any business awards or any special recognition?

Are you involved in any associations (Industry, Standard, BBB etc)

Please list all that apply.

Details on Presnce

Details on your Website/ Web Presence



Do you have access to the following:

- ☐ Google Analytics
☐ Google Tag Manager
☐ Google My Business

Define your website goals.

i.e.: get Estimate Requests, Sell products, Make visitors call us, etc..

Who are the people who you want to attract to your website.

Be specific and list as much detail as possible. What kind of company do they work for? What position do they have?

What is the ultimate conversion goal for your website?

Select only one main goal.

What are potential stepping stones towards conversion that a visitor may require.

You defined your conversion goal previously. Most visitors need to be guided towards that goal and on the way they have information need. Describe a typical visitor's path to conversion on your website

Do you have company colours or a branding scheme .

If you have a colour palette please provide the colour codes.

Upload your logo

[Upload File](#)

Sites you like

please provide 3-5 URLs for websites you have seen that you like the style and general design.

Pages the site should have:

i.e Home, About Us Services, Contact Us

Instructions for content Upload

1. Create a Word Document with one page for each content page required.
2. On each page start with Title: ie About Us
3. Provide a Headline for the page
4. Provide the content for the page (we will do layout)
5. Provide image in document or provide description of image you envision)
5. upload completed document

Upload Document

[Upload Content doc File](#)

Special Functionality Required

i.e. contact forms, estimate forms, before after images, video embedding, calculators, slide shows, galleries, appointment booking, pop up windows, notification bars, testimonials or anything else you may need.

Please list your active social media accounts with the URL

Facebook, Instagram, Twitter, Linked In, TikTok,

What other marketing are you engaged in?

Is your website expected to attract mostly new customers or serving existing customers?

- ☐ Attract New Customers
☐ Serve Existing Customers

Please define the geographical target for your website

What communication channels can you offer your customers?

- ☐ Local Phone
☐ Toll Free Phone
☐ Fax
☐ Mobile Phone
☐ Email
☐ Chat on Website
☐ SMS/TXT
☐ Web Forms
☐ Fax

☐

By checking, I confirm that I am providing the information to WSI Digital and this information shall become part of the project assets. WSI will prevent unauthorized access as per published terms and conditions.

Person who filled out questionnaire

email address

Direct Phone Number:

☐ I'm not a robot





Learn firsthand why other businesses work with WSI.

[CONTACT US TODAY](#)

The Power of the WSI Network

WSI is the largest digital marketing network of its kind. We have partners and clients in every corner of the world. We have the passion and the experience to help any business do better marketing – no matter where they are.

[SEE OUR CASE STUDIES →](#)

WSI LOCAL OFFICE WINNIPEG

34 Deer Run Drive
Winnipeg, MB
R3P 2L4

Phone: 204-294-9974
Fax: 204-272-6379
Email: info@whywsi.com

SOCIAL



ABOUT US

[Why WSI?](#)
[The WSI Story](#)
[Awards](#)
[Leadership](#)
[Careers](#)
[Culture](#)
[WSI in the Community](#)

CONTACT US

[Contact Us](#)
[Request a Consultation](#)

SERVICES

[Competitive Analysis](#)
[Buyer Persona Development](#)
[Landing Page Optimization](#)
[Web Design and Development](#)
[eCommerce](#)
[Content Marketing](#)
[Inbound Marketing](#)
[Social Media Marketing](#)
[Social Selling](#)
[Paid Search Advertising](#)
[Adaptive SEO](#)
[Marketing Automation](#)
[Email Marketing](#)
[Mobile Marketing](#)
[Video Marketing](#)
[Analytics and Reporting](#)
[WSI Web Essentials](#)

CUSTOMER STORIES

[Making a Difference](#)
[Case Studies](#)
[Testimonials](#)

OUR EXPERTS

[Leveraging Global Expertise](#)
[Delivering Local Results](#)
[Speak with a WSI Expert](#)

BLOG

[Blog](#)
[Subscribe Now](#)