

General Client Intake Form & Onboarding Process

General Client Intake Form

1. Basic Business Information

- * Business Name:
- * Business Address:
- * Website URL:
- * Industry/Type of Business:
- * Year Established:
- * Number of Employees:
- * Business Structure (LLC, Corporation, Sole Proprietorship, etc.):

2. Primary Contact Information

- * Contact Name:
- * Title/Role:
- * Phone Number:
- * Email Address:
- * Preferred Contact Method (Phone, Email, Text, Video):

3. Business Operations & Goals

- * Brief Description of Products/Services Offered:
- * Current Business Challenges or Pain Points:
- * Key Business Goals (e.g., growth targets, profitability, market expansion):
- * Any Upcoming Projects/Initiatives:
- * Geographic Markets Served (local, regional, national, global):

4. Existing Digital Marketing & Communication Tools

- * List all marketing, SEO, email, analytics, CRM, and advertising tools your company uses

(e.g., Google Analytics, HubSpot, Mailchimp, SEMrush):

* Does everyone in your company use AI or automation tools? If yes, which tools, and for what purposes?

5. Content & Multimedia

* Please upload or provide links to any photos or videos of products, team, office, or events:

* Do you need a commercial/video produced?

* Do you have a podcast?

* Would you like help producing a podcast?

* Do you have a YouTube channel?

* Would you like help creating or managing a YouTube channel?

* Do you have a blog?

* Would you like help creating or managing a blog?

6. Business & Community Engagement

* Are you a member of the Better Business Bureau?

* Are you listed on Yelp?

* Do you work with chambers of commerce, industry associations, or networking groups?

* Do you attend local or industry events?

* Do you host events? If yes, are these in person or online?

* Do you host webinars about your company or services?

* Have you written a book? Would you like help writing a book?

* Have you conducted webinars? Would you like help producing webinars?

7. Public Relations & Media

* Do you currently issue press releases? Would you like help creating them?

* Do you have contacts with journalists, newspapers, or industry publications? Would you like assistance with journalist outreach or press relations?

8. Services Interested In?

* Marketing Strategy & Execution

* Website Design/Development

* SEO/Local SEO Services

* Content Creation (Blog, Video, Social Media)

* Lead Generation / Sales Funnel Setup

- * Business Process Improvement
- * Commercial/Video Production
- * Podcast Production
- * PR and Media Relations
- * Other (please specify):

9. Timeline & Budget (\$100/hr)

- * Desired Project Start Date:
- * Anticipated Project Duration:
- * Approximate Budget Range:

10. Additional Information & Documents

- * Please upload any relevant documents (financial statements, marketing materials, business plans, etc.):
- * Other important notes or special requests:

General Client Onboarding Process

1. Initial Inquiry & Intake Form Completion

- * Send the updated intake form for completion with new marketing and media questions included.

2. Discovery Call/Meeting

- * Review responses focusing on multimedia, marketing tools, events, PR interests, and AI integration.
- * Discuss specific needs around podcasts, YouTube, blogging, commercial production, and media outreach.

3. Proposal & Agreement

- * Tailor solutions to client priorities including content production, AI tools usage, and PR activities.
- * Define scope, timeline, pricing, and terms aligned with multimedia and marketing needs.

4. Kickoff & Access Gathering

- * Gather login credentials including marketing platforms, social media, Google Business Profile, and any multimedia assets.

- * Confirm client goals around video/podcast production, blogging, event hosting, and PR outreach.

5. Project Execution & Reporting

- * Provide progress updates on content creation, media relations, SEO, and AI tool implementations.

- * Adjust deliverables based on feedback, emphasizing multimedia and marketing activities.

6. Ongoing Support & Review

- * Regularly review AI tool adoption, content performance, and community/media engagement.

- * Plan future campaigns, podcast episodes, webinars, or book projects as requested.