

Client Intake Questionnaire

Collect the context you need before work begins so the kickoff call is strategic, not repetitive.

BUSINESS BASICS

Business / Company Name

Website

Primary Contact

Primary Email

Industry / Niche

Primary products or services

Short description of the business

GOALS & PRIORITIES

What are your top 3 business priorities right now?

What should this engagement help improve?

What would a successful outcome look like in the next 30, 60, or 90 days?

Which outcome is the highest priority?

AUDIENCE & CUSTOMERS

Who is your ideal customer or client?

What problems are they trying to solve?

What objections or concerns do they commonly have?

CURRENT SITUATION

How is this work currently being handled?

What is already working well?

What is not working well?

What have you tried before?

BRAND & MESSAGING

Do you have brand guidelines?

Describe your preferred tone of voice.

List key messages, offers, or value propositions we should understand.

Share competitors or brands you admire and why.

WORKFLOW & COLLABORATION

Who will approve work?

Who else will I collaborate with?

Preferred communication channel

Expected response time / overlap

Preferred update frequency

TOOLS & ACCESS

List the tools/platforms used for this work.

What access will be required?

Are there security, privacy, or compliance requirements?

SCOPE & BOUNDARIES

What tasks are included?

What tasks are not included?

Are there recurring deadlines?

Are there known risks, dependencies, or constraints?
