



# NEW CLIENT *Questionnaire*

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CLIENT WELCOME PACKET

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2024

*Amy Nichols*

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# BASIC INFO

Business Name :

Website URL :

Mailing Address :

Key Point of Contact :

Email Address(s) :

Phone Number :

Preferred Correspondence Method :

Time Zone :

## MORE INFORMATION

*Brand Guidelines* logos, color codes, fonts, etc.

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*Logins* Logins/Passwords

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*Ad Account ID* Facebook ads

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*Thank you!*

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# UNDERSTANDING YOUR BUSINESS

No one knows their business as well as you do!



*Audience*

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Who are your target audiences?

*Distribution  
Channel*

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What are your areas of distribution?

*Products  
/Services*

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Top 3 Best Selling Products/Services

*Keywords*

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Search Keywords

*Competitors*

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Top 5 Competitors

# ABOUT YOUR CUSTOMER

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*Email/  
Customer list*

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For email marketing, ad retargeting

*Key  
Demographics*

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age, gender, location, etc.

*Customer's  
Pain Points*

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Customer's Pain Points

*Social Media*

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Top-Performing Social Media Platforms

## ADDITIONAL NOTES

If you have further information, please write down here

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