



Client Intake Form

1. Business & Contact Information

Date: __/__/____

Full Name: _____

Business Name: _____

Email Address: _____

Phone Number: () _____

Website: _____

Location: City _____ State ____ Country _____

Preferred method of communication: ☐ Email ☐ Phone ☐ Text ☐ WhatsApp ☐

Please list: _____

2. Social Media Presence

Which platforms are you currently active on?

☐ Instagram ☐ TikTok ☐ Facebook ☐ YouTube ☐ Pinterest
☐ LinkedIn ☐ Twitter/X ☐ Snapchat ☐ Threads ☐ None

Links to current profiles (please paste):

- Instagram: _____

- TikTok: _____

- Facebook: _____

- Other: _____

Do you have access to analytics (e.g. Meta Business Suite, TikTok Analytics)? ☐ Yes ☐ No

3. Goals & Objectives

What are your top 3 goals for social media?

1) _____

2) _____

3) _____

Who is your target audience (age, gender, interests, location)?

What services are you most interested in?

☐ Content Creation ☐ Content Strategy ☐ Full Account Management
☐ Engagement & Community Management ☐ Analytics & Reporting
☐ Influencer/Creator Outreach ☐ Brand Outreach ☐ Social Media Consulting

4. Branding & Voice

Do you have brand guidelines (colors, fonts, logos)? ☐ Yes ☐ No

What 3 words describe your brand's tone/voice?

- _____

Are there brands or accounts you admire or want to emulate? (Please list)

- _____

- _____

- _____

- _____

- _____

5. Content Preferences

Do you already have photos/videos you'd like us to use? ☐ Yes ☐ No

Preferred content types:

☐ Reels/Short-Form Video ☐ Carousels ☐ Static Graphics ☐ Memes ☐ Stories



Do you require help filming or editing content?
☐ Filming ☐ Editing ☐ Both ☐ Neither

6. Logistics & Timeline

Do you have a specific start date in mind?

____/____/____

Any upcoming campaigns, launches, or events?

Preferred frequency of posts (per week):

How involved do you want to be in content planning?

☐ Hands-on ☐ Collaborative ☐ Mostly hands-off

7. Budget & Payment

What is your monthly budget range for social media services?

☐ Under \$750 ☐ \$750–\$1,500 ☐ \$1,500–\$3,500 ☐ \$3,500+

Are you looking for a short-term or long-term partnership?

☐ 1–3 months ☐ 3–6 months ☐ 6+ months ☐ Not sure yet

8. Final Notes

How did you hear about us?

Is there anything else you'd like us to know?
