



## **Onboarding Form**

**Website:**

**Social Media Handles + PW (if applicable):**

**Date:**

Below are some questions to help you come up with a social media and digital marketing strategy. Together we will write down some of your business goals, and figure out who your competitors are and how we can overtake the digital space.

**What is your elevator pitch? If you had 2 minutes to tell a complete stranger what your company does/is, how do you describe it? Include the professional version and the dumbed-down version.**

**List specifics about your business: (i.e. X amount of years in business, how many years experience, 20 machines onsite, eco-friendly, are you family owned, is your menu all vegan, are you under new ownership, do you get new shipments every week, do you have the biggest inventory in town, are all your products cruelty-free, etc.)**

**What is your GOAL for social media? List all that apply (brand awareness, investors, new customers, networking in the industry, growing your email list, etc.):**

**Who Is Your Target Customer/Follower (educated male 35-55 or Engineer at company XYZ, women 20-70 who live within 5 miles of my business, women who shop online for deals, etc.):**

**Who Are Your Top 3-5 Key Competitors (think locally *and* nationally)?**

**How are you currently finding new customers?**

**Do you only service locally or what is your service area?**

**Is there a business that does what you do and kills it? They are the best of the best (it can be another state)**

**What kind of music would fit your brand (for Instagram Reels, if applicable)? i.e. jazz, no words, anything trending?**

**What celebrity could represent your brand, if applicable? (this helps for visualization aspects – i.e. Michelle Obama is much different than Madonna)**

**How do you sell yourself above your competition? What is your sales pitch? Are you cheaper? Most experienced? Faster customer service? Locally owned? Been in business 50+ years? Money Back Guarantee? 5-Star Reviews? Do you get all HOA approvals? Are you more medically advanced than others? List all that apply**

**What are some things your company currently does really well?**

**What are some things your company needs to improve on? (You can be honest; this is just for marketing help)**

**If we are talking SEO (Google and websites) -- if you were to search for your company/products online, what are 5-10 ways you would type it in Google (i.e. Bobcat Rentals in Denver, board certified plastic surgeon in Houston, Construction Equipment Rental in Denver, Custom Home Builder in Houston, etc.) – feel free to ask the rest of your team this**

**For social media, do you know your content pillars? (this is what you want to focus on – if this isn't top of mind, write a few down and use the question below for some guidance)**

**If you offer multiple services, what are your top 2-4 pushes/goals you want to focus on?**

**Do you think your current website accurately reflects what your company is/does?**

**What are some applicable call to actions? i.e. call us today for a free quote? We offer affordable and competitive pricing. Call or email us today. We work with insurance companies, so call us. Come try our all-new Vegan menu today.**