

Prospective Client Intake Form

Name of Prospect: _____ Name of Business: _____ Date: _____

Referred by: _____ Description of business: _____ Goals for our work together:
(questions/concerns)

Annual Revenue: _____

Value of 1 Customer: _____

How long in business? _____

Number of employees: _____

Number of locations: _____

Review of Marketing Stack:
(Current situation as reported by the prospect)

Current Advertising: _____ Listings Management: _____ Reputation Management: _____

Social Media: _____ Website: _____ SEO: _____

Prospect Contact Information:

Business Category/Industry:

Business Address:

Website URL:

Business Phone:

Personal Email:

Business Email:

Personal Phone:

Next steps:

Services/Prices Quoted:



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