

Prospective Client Intake Form

Prospect name:

Business name:

Date:

Is the prospect the decision maker?

Goals for our work together:

Referred by:

Annual revenue:

Value of 1 customer:

Years in business:

of employees:

of locations:



Review of Current Marketing Stack

Current advertising:

Listings management:

Reputation management:

Social media:

Website:

SEO:



Prospect Contact Information

Business category/industry:

Business address:

Website URL:

Business phone:

Prospect email:

Business email:

Prospect phone:

Next Steps & Proposals

Next steps:

Services/products quoted: