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Client Intake

PROFILE & CONTACT INFORMATION

Name of Business _____

Contact/Title _____

Birthdate _____

Additional Contacts _____

Mailing Address _____

Telephone _____ Fax _____

Email _____

Website _____

Nature of Business _____

Mission Statement/Tagline/Motto

BUSINESS BASICS

What is your typical client profile?

Who are your competitors?

What are your differentiators?

Are there specific products or services that you want to promote?

What challenges are you experiencing?

Human Resources: Training, Internal Communications, Incentives?

CURRENT MARKETING EFFORTS

PR

Print Advertising

Radio

Other Advertising

Events

Email programs

Charitable programs

Partnerships & Affiliations

Awards/Press

Branding/collateral: check if you have the following:

- A written bio
- Logo
- Website
- Brochure
- e-Newsletter
- Media kit
- Sales Materials
- Business Card

