CLIENT ONBOARDING QUESTIONNAIRE

Send this the day the agreement is signed. The answers prevent 90% of mid-project surprises.

1. Business name, address, and who signs off on final work?

_____

2. In one sentence: what does success look like for this project?

_____

3. Who is it for? Describe your customer like a person.

_____

4. What do you already have? (logo, photos, accounts, logins, existing files)

_____

5. What have you tried before, and what didn't work?

_____

6. Deadline — is there a real event driving it (launch, season, opening)?

_____

7. Who else needs to approve things, and how fast do they usually reply?

_____

8. How do you want updates — email, text, a weekly call?

_____

9. Budget range for the whole project, honestly?

_____

10. Anything else I should know before I start?

_____