



Marketing Consultation – Client Intake Form

Thank you for your interest in working together! This form helps me understand your business, goals, and where marketing can make the biggest impact. Please answer as best you can — it's okay if you don't have all the answers yet.

SECTION 1: About You & Your Business

1. Full Name:

2. Business Name:

3. Email Address:

4. Phone Number:

5. Website or Social Media Handle:

6. Business Location (Suburb / Region):

7. Briefly describe what your business does:

8. How long have you been in business? (Just starting out / 1–3 years / 3–5 years / 5+ years)



SECTION 2: Current Marketing Snapshot

9. What marketing channels are you currently using? (tick all that apply)

Instagram

Facebook

Tik Tok

LinkedIn

Paid social ads

Online / display advertising

YouTube Channel

Blog / content marketing

Website

Lead Gen/Lead Capture Form

Google My Business Page

Reviews – Website / Facebook

Testimonials – Website, requesting reviews or testimonials on invoices

Business Collaborations / Referrals / Partnerships

Client referral program

Email Marketing

Radio / TV

Any other automations

Brochures or printed marketing



Postcards / DL flyers

Merchandise / Uniforms

10. What's currently working well for you (if anything)?

11. What's not working or feels inconsistent right now?

12. How do you currently attract or find new clients/customers?

SECTION 3: Goals & Priorities

13. What are your top 3 marketing goals for the next 6–12 months?

Generate leads / new clients

Book appointments

New build clients / Renovation clients

Collaborations / Partnerships

Brand awareness

Thought leadership

Educational and informative

14. If we could achieve one big result together — what would it be?

15. Which areas would you like help with? (Brand strategy, Planning, Socials, Email, SEO, Ads, etc.)



16. What's your current monthly marketing budget (or comfortable range)?

SECTION 4: Working Together

17. Have you worked with a marketing consultant or agency before?

18. What's important to you in a working relationship? (Communication style, results, creativity, etc.)

19. Preferred way to work: (One-off project / Ongoing support / Not sure yet)

20. When are you looking to get started? (ASAP / Within 1 month / 3 months / Exploring options)

SECTION 5: Final Step

21. Is there anything else you'd like me to know before we chat?

22. How did you hear about me? (Referral, Google, Instagram, etc.)

Thank you! I'll be in contact soon.

Sharon