Ivar Johnson - Digital Media and Marketing
Client Questionnaire for **Preliminary Consultation**

You will be asked to complete this questionnaire as thoroughly as you can before our first consultation. We will review this document and do some research in light of it before our next meeting. Do not be concerned if there are some answers you cannot yet provide, we will address them later as necessary.

I. **Part One**

A. What is your name? _____

B. Business Name? _____

C. Telephone number :

    i. office: _____

    ii. cell: _____

D. Business address? _____

E. Business website URL: _____

F. What is the nature of your business?

G. How Many Employees? _____

H. Do you already have

i. Website	_____ yes	_____ no
ii. Media/Video	_____ yes	_____ no
iii. Advertising	_____ yes	_____ no
iv. Advertising collateral	_____ yes	_____ no
v. Press @ company	_____ yes	_____ no
vi. Stationery	_____ yes	_____ no
vii. Logomark	_____ yes	_____ no
viii. Color Palette	_____ yes	_____ no
ix. Company Typeface(s)	_____ yes	_____ no
x. Brand ID Guidelines	_____ yes	_____ no
xi. Tagline	_____ yes	_____ no

xii. Brand Promise   _____ yes   _____ no

xiii. Slogan   _____ yes   _____ no

xiv. Ephemera   _____ yes   _____ no

xv. Brochures   _____ yes   _____ no

xvi. Packaging   _____ yes   _____ no

xvii. Products? (besides services) _____ yes   _____ no

xviii. Blog   _____ yes   _____ no

xix. Business Facebook Page   _____ yes   _____ no

xx. Twitter Account for business   _____ yes   _____ no

xxi. Other Social Media   _____ yes   _____ no

    1. What?

xxii. Social Media Plan

xxiii. Digital Analytics Plan

xxiv. Photographs of your business, clients?   _____ yes   _____ no

xxv. Release forms for photography, video, client quotes   ____ yes _____ no

xxvi. Are all your photos and branding graphics stored on an accessible server?   _____

  yes   _____ no

xxvii. Do you own the copyright to your current website?   ____ yes _____ no

    1. please explain (how you own it, or who owns if not you)

xxviii. Do you own the copyright / trademark rights to your logomark and branding ? ___

  yes   ____ no

    1. please explain (how you own it, or who owns if not you)

xxix. Other:

II. Part Two

A. Please list the names and URLs (websites) of your top five competitors: (this can be individuals, other authors, publishers, other businesses

     i.   _____

     ii.   _____

     iii.   _____

     iv.   _____

B. Who are the other stakeholders involved in your business? (suppliers, business affiliates, partners, other service providers, customers, etc – people you work with within the normal course of your business day(s) - **list all you can think of.**

C. Do you have a company Mission Statement? (please supply if so)

     i. _____Yes _____No

D. What are your top 3 business goals of currently?

     i.   _____

     ii.   _____

     iii.   _____

E. What are your top 3 business challenges currently?

     i.   _____

     ii.   _____

     iii.   _____

F.   Is there a business strategic plan in place? (please supply if so) _____ yes _____ no

G.   Is there a marketing strategic plan in place? (please supply if so) _____ yes _____ no

H.   Who is your primary target audience/market?

I.   What are your secondary and tertiary target audience / market, if applicable?

J.   What goals do you have for *this project?*

K.   What do you specifically hope to accomplish? (i.e. how will you judge the success of this project?)

L.   How do you envision the project supporting your organization missions and objectives?

III. Part Three

A.   What materials do you already have prepared and available for this project?

B.   Do you do presentations for your business?   Yes_____ No _____

     i.   If so, where, and to whom?

     ii.   Do you use media for the presentations? Yes_____ No _____

        1.   what media?

        2.   who creates this media, or where do you obtain it?

C.   Who on your staff will assist in website, social media, marketing material maintenance?

    i.   who is responsible for what?

      1. Oversight of WEB site / App

      2. Determine new content

      3. Oversee website general maintenance

      4. Oversee website evolution

          a. of website

          b. of branding materials

          c. of social media

      5. Write body copy

      6. Supply photos and graphics (be specific)

      7. Edit photos or graphics

8. Maintain social media that site links to (be specific)

9. Update HTML _____ CSS_____ Javascript _____

    CMS_____ PHP_____ E-Commerce _____

10. Customize website

D. Have you defined the scope of the project?

E. Is there a creative brief?   Yes _____ No _____

F. Is there a budget?

G. What kind of time frame are you looking at?

H. Are there any events coming up that you would like to tie a (web, identity, branding, media, etc.) project or project launch to?

I. What else would you like to add?