

FREELANCE CLIENT ONBOARDING INTAKE QUESTIONNAIRE

STRATEGIC DISCOVERY, PROJECT SCOPE, BRAND GOALS & TECHNICAL DELIVERABLES

CLIENT COMPANY: _____ PRIMARY STAKEHOLDER: _____ DATE INITIATED: ____/____/20____
EMAIL: _____ PHONE: _____ WEBSITE: _____
Existing Brand Tagline / Elevator Pitch: _____

1. CORE BUSINESS OBJECTIVES & AUDIENCE

Primary Goal of Project: ☐ Rebrand ☐ Lead Gen ☐ Launch

Target Demographic / ICP: _____

Customer Pain Point Solved: _____

Key Competitors (2-3): _____

Unique Value Proposition: _____

Tone of Voice: ☐ Bold ☐ Clean ☐ Luxury ☐ Playful

Desired Brand Emotion: _____

Revenue / Conversion Goal: _____

Success Metric (KPI): _____

2. SCOPE SPECIFICATIONS & DELIVERABLES

Required Services: ☐ UI/UX ☐ Web ☐ Copy ☐ Strategy

Format Needed: ☐ Figma ☐ Vector SVG ☐ PDF ☐ Web

Existing Brand Assets Available: ☐ Logo ☐ Fonts ☐ Style Guide

Copywriting Provided by: ☐ Client ☐ Freelance Studio

High-Res Imagery Provided by: ☐ Client ☐ Stock Sourced

Total Number of Screens / Pages: _____

Integrations Needed: ☐ CRM ☐ Stripe ☐ Email ☐ Analytics

Inspirational Reference Sites: _____

Non-Negotiable Deadlines: _____

3. BUDGET, TIMELINE & STAKEHOLDERS

Total Approved Budget: \$ _____

Payment Structure: ☐ 50/50 ☐ 50/25/25 ☐ Monthly Retainer

Final Sign-off Decision Maker: _____

Key Internal Reviewers: _____

Target First Draft Date: ____/____/20____

Target Revisions Due Date: ____/____/20____

Official Launch / Handover Date: ____/____/20____

Weekly Check-in Preference: ☐ Zoom ☐ Loom ☐ Slack

Emergency Contact: _____

Additional Notes: _____

4. KICKOFF CHECKLIST & ACCEPTANCE

☐ Service Agreement & Contract Signed

☐ Initial 50% Kickoff Deposit Cleared

☐ Shared Google Drive / Dropbox Folder Created

☐ Brand Guidelines & Vector Logos Uploaded

☐ Credentials & API / Hosting Access Granted

☐ Kickoff Alignment Call Completed

☐ First Sprint Deliverable Scheduled

CLIENT SIGNATURE: _____

PRINT NAME: _____ DATE: ____/____/20____

STUDIO LEAD: _____ DATE: ____/____/20____