Client Data Collection Form

Company Information

Company Name:

Contact Name:

Contact Email:

Phone Number:

Website (if applicable):

Industry:

Please select your primary industry from the list: (Dropdown menu with industry options)

Business Model:

Briefly describe your business model (e.g., e-commerce, brick-and-mortar, service-based):

Data Collection

1. Products & Inventory

Please list all the products you currently offer (include space for adding rows):

Product Name:

Product Description (brief):

High-resolution product image (upload option):

Inventory level (number of units currently in stock):

Optional: Quality Rating (1-5 stars):

2. Pricing & Profitability

Please enter the following information for each product listed above (include space for adding rows):

Product Name:

Selling Price:

Cost per Unit:

Calculated: Profit Margin (automatically calculated based on selling price and cost per unit):

3. Suppliers & Partnerships

Do you source any products from external suppliers? (Yes/No)

If yes, please list your primary suppliers (include space for adding rows):

Supplier Name:

Contact Name:

Contact Email:

Phone Number:

Nature of Partnership (e.g., wholesale, dropshipping):

4. Promotions & Discounts

Do you currently offer any product discounts or promotions? (Yes/No)

If yes, please describe your current discount structure (e.g., seasonal sales, loyalty program discounts):

You can also upload any relevant marketing materials related to discounts (e.g., flyers, social media posts - upload option).

5. Social Media Presence

Please list the social media platforms you are active on (checkboxes for relevant platforms):

Facebook

Instagram

Twitter

TikTok

YouTube

Others (please specify)

Optional: If you have access to social media analytics reports, you can upload them here (upload option).

6. Financial Health

We understand the importance of financial confidentiality. You can choose to share the following documents at your discretion (upload options):

Income Statement (optional)

Balance Sheet (optional)

Cash Flow Statement (optional)

7. Marketing Strategies

Briefly describe your current marketing strategies (e.g., social media marketing, email marketing, influencer marketing):

8. Investments & Assets

Do you have any planned investments in the near future? (Yes/No)

If yes, please briefly describe the nature of the investment:

Additional Information

Is there any other relevant information you would like to share about your business?

Thank you for your time and cooperation!