CLIENT INTAKE QUESTIONNAIRE







ABOUT DIGITALMARKETER

DigitalMarketer combines the largest community of digital marketing pros on planet Earth with the best dang digital marketing training you'll find anywhere.

We're on a mission to double the size of 10,000 businesses and want to help you:

Drive More Traffic,

Produce Stellar Content,

Write Emails That Generate Clicks,

...and

Become the Smartest Marketer in the Room.

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INTRODUCTION

Far too often we see agencies and consultants bringing clients on without any particular process for how a new client is onboarded. **THIS IS A BIG MISTAKE.** Onboarding effectively is one of the most critical steps in creating long-term, high-value relationships with your clients.

But, why?

- 1. When you're bringing a client on they're excited about what you can do for them and they're ready to talk. Six months down the road when they're excited about something else it will be much harder to ask these onboarding questions.
- 2. With an effective onboarding process, you might learn that the direction you decided to go initially isn't actually the right place to start.
- 3. We are most interested in people who are most interested in us. If you ask a bunch of questions about the client early on, they are going to continue to be really interested in you because you're really interested in them.



4. Onboarding questionnaires establish authority. When you establish authority early on, your clients will trust you more throughout your relationship.

The list goes on and on...

After years of testing, we've identified **15 of the best onboarding questions** you can ask a new client that build your authority and establish a relationship that will work to increase the lifetime value of every client that you bring on.

These questions are meant to be read as a script, making it easy for anyone within your company to onboard new customers.

Note: These questions are designed for new clients who have already signed on with you.



THE ONBOARDING QUESTIONS

1.
Please take two minutes and give me a little background of your business and a brief overview of the products and services you offer
2.
What differentiates you from the competition? What's your "Unique Selling Point"?
3.
In a perfect world, what are you hoping we can accomplish together? What's YOUR desired end result?
4.
What is your core/flagship offering? What's the product or service that you're most proud to sell and deliver? What do you hope most people will buy from you?



5.
How much do you charge for this product/service?
6.
How are you currently generating the bulk of your traffic, leads, and customers?
7.
How much traffic do you get on a daily, weekly, or monthly basis?
8.
How many new leads are you adding each month?
9.
How many new customers are you adding each month?
10.
Describe your current customer



11.
Is this your IDEAL customer or just the one you're getting? If not, also describe your ideal customer.
12.
What's the one thing you can tell or show someone that will make them say "WOW!!"?
13.
If you had two minutes to impress someone, what would you say, show, or give them that would blow their mind?
14.
What's the one big thing your prospect wants more than anything else?
15.
What's the one big thing that's keeping your customer from achieving their desired end result ?
Ex. Drive the ball 20 yards further (golfers), lose 10 pounds in 10



shipping (ecommerce), etc.

days (dieters), generate 10 inbound calls a week (salespeople), free

WHAT'S NEXT?

Now that you're onboarding new clients effectively and starting along the path to generate more valuable relationships and revenue, you're ready to <u>take your agency to the next level!</u>

If you're ready to get more clients, improve client retention, and generate more passive income from the clients you already have, DigitalMarketer is here to help with our <u>Certified Partner Program</u>.

We want to double the size of your business so you can do the same for your clients.



What can our Certified Partner Program do for you?



GENERATE MORE HIGH-CONVERTING LEADS AND CLIENTS

"I just want more clients."

Partner Directory

Tap into DM's massive community for free leads

Nutshell Presentations

Turnkey content for webinars and live presentations

Copy and Paste Emails

Attract new prospects and reconnect with legacy clients

Pre-Sale Checklists & Audits Proven tools and resources

that turn prospects into clients...every time



SYSTEMIZE AND SCALE YOUR MARKETING AGENCY

"FREEEEEEEDOM!!!!"

Dm Certifications

Train your team, expand your service offerings

Sample Agreements

Review and modify your fellow partners' agreements

Template Library

Use our templates and take all the credit (and profit)

Checklists, Audits & Questionaires

Systemize and even automate the onboarding process



GROW RETAINERS, RETENTION, AND RECURRING REVENUE

"I want to build predictable value."

Value Journey Audit

Funnel seamlessly into any retainer sale

Partner Community

Tap into fellow partners and never say "No" to a client again

Template Library

Use our templates to do work you wouldn't normally do

GrowthRamp

Train your clients, elevate your status and "SaaSify" your agency

So, if you're serving small businesses, then we want to serve you. Let's start a conversation today about becoming a DigitalMarketer Certified Partner and get the tools and training you need to double your client's business and your own.

LEARN MORE »

Together we'll double the size of 10,000 businesses.

