

NEW CUSTOMER ON-BOARD FORM OUTLINE

Goals & Expectations

ACCOUNT INFORMATION

Sales Rep _____ Contract Amount _____ Estimated Start Date _____

COMPANY INFORMATION

Company Name _____ Company Address _____

Company Phone _____ Company Website _____

Company Fax _____

MAIN CONTACT INFORMATION

Contact Name _____ Company Address _____

Contact Phone _____ Company Email _____

PRODUCTS

☐ MAPSPUS

☐ PPC

Budget _____

☐ SEO

☐ SOCIAL MEDIA

☐ PRESENCE

☐ ENGAGEMENT

☐ CUSTOMER REWARD

☐ PRINT

Type _____

☐ DISPLAY

Location _____

☐ ENROLLMARK

☐ STARTER

☐ ESSENTIAL

☐ PREMIUM

☐ MICROSITE

☐ DEAL CHICKEN

☐ POSTCARDS

☐ OTHER _____

☐ DENTIMARK

☐ STARTER

☐ ESSENTIAL

☐ PREMIUM

PAIN POINTS

1

3

2

4

GOALS AND EXPECTATIONS

(OBJECTIVE, MEASURABLE & REALISTIC. I.E. 2X ROI, 20 CALLS/MO.)

Business Information

BUSINESS PROFILE

Year Established _____	Email for Contact Form _____
# of Locations _____	Weekday Hours: _____ to _____
# of Employees _____	Saturday: _____ to _____ Sunday: _____ to _____
Languages Spoken _____	Special Times: _____
24Hr Emergency Service? <input type="checkbox"/> YES <input type="checkbox"/> NO	_____
Description of Business: (<200 characters) _____	

Brand Name Products Offered: _____	

UNIQUE SELLING POINTS

5 Categories that Define Your Business (industry terms)	5 Cities You Service Most (most important first)	5 Products/Services You Offer (most important first)
1: _____	1: _____	1: _____
2: _____	2: _____	2: _____
3: _____	3: _____	3: _____
4: _____	4: _____	4: _____
5: _____	5: _____	5: _____

PAYMENT TYPES ACCEPTED

<input type="checkbox"/> Cash	<input type="checkbox"/> Amex	<input type="checkbox"/> Visa
<input type="checkbox"/> Check	<input type="checkbox"/> Diner's Club	<input type="checkbox"/> Financing
<input type="checkbox"/> Traveler's Check	<input type="checkbox"/> Discover	<input type="checkbox"/> Google Checkout
<input type="checkbox"/> Invoice	<input type="checkbox"/> MasterCard	<input type="checkbox"/> PayPal

BUSINESS OPERATIONS

Return Policy? <input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, please explain: _____ _____ _____	Satisfaction Guarantee? <input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, please explain: _____ _____ _____	Discount Offered? (i.e. Seniors, Military...) <input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, please explain: _____ _____ _____
Create Online Coupon? <input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, please explain: _____ _____ _____	Awards Received? <input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, please list: _____ _____ _____	Licenses and/or Certifications? <input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, please list: _____ _____ _____
Business Associations and/or Organization Memberships? <input type="checkbox"/> NO <input type="checkbox"/> YES If Yes, please list: _____ _____ _____		

GENERAL COMMENTS

Local Listing Information

Google Claimed?

☐ YES ☐ NO

If Yes, list login information:

Username: _____

Password: _____

Bing Claimed?

☐ YES ☐ NO

If Yes, list login information:

Username: _____

Password: _____

Yahoo Claimed?

☐ YES ☐ NO

If Yes, list login information:

Username: _____

Password: _____

Microsite Information

Integrated Blog?

☐ YES ☐ NO

Microsite Photos?

☐ See Website ☐ Use Stock ☐ See Attached

Customer Testimonials? ☐ YES ☐ NO

If Yes, location (Yelp, Kudzu, Angie's List, etc.) _____

KEYWORDS

Focused Keywords?

☐ YES ☐ NO

If Yes, please list:

Interested Related Keywords to Avoid?

☐ YES ☐ NO

If Yes, please list:

Keywords to Avoid for Ethical/Legal Reasons?

☐ YES ☐ NO

If Yes, please list:

FREQUENTLY ASKED QUESTIONS

Question: _____

Answer: _____

Question: _____

Answer: _____

Question: _____

Answer: _____

Question: _____

Answer: _____

Question: _____

Answer: _____

NOTE: FILL OUT MicrositeCreativeBrief.doc

Social Media Information

Facebook Profile?

☐ YES ☐ NO

If Yes, list login information:

User.: _____

Pass.: _____

Twitter Profile?

☐ YES ☐ NO

If Yes, list login information:

User.: _____

Pass.: _____

Yelp Profile?

☐ YES ☐ NO

If Yes, list login information:

User.: _____

Pass.: _____

FourSquare Profile?

☐ YES ☐ NO

If Yes, list login information:

User.: _____

Pass.: _____

SEO

Has SEO been previously performed on the website?

If Yes: When was it last updated? _____ Can analytical data be accessed? ☐ YES ☐ NO

When was the website created? _____

Was the domain used by another company before it was purchased it? _____

Are any other domains redirecting to the main website? _____