**[A green sign with white text

Description automatically generated with low confidence](https://www.smartsheet.com/try-it?trp=10851&utm_source=integrated-content&utm_campaign=/content/client-intake-form-template&utm_medium=Marketing+Client+Intake+Form+doc+10851&lpa=Marketing+Client+Intake+Form+doc+10851)MARKETING CLIENT INTAKE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| COMPANY NAME |  |  |  |  |  |
|  | | | |  |  |
| CLIENT'S FULL NAME |  |  |  |  |  |
|  | | | |  |  |
| EMAIL ADDRESS |  | PHONE NUMBER |  |  |  |
|  | |  | |  |  |
| JOB TITLE |  |  |  |  |  |
|  | | | |  |  |
| JOB RESPONSIBILITIES |  |  |  |  |  |
|  | | | |
| COMPANY WEBSITE URL | |  |  |  |  |
|  | | | |  |  |
| SOCIAL MEDIA PLATFORMS | |  |  |  |  |
|  | | | |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| COMPANY DESCRIPTION |  |  |  |  |
|  | | |
| DESCRIBE YOUR BUSINESS'S PRIMARY PRODUCTS AND/OR SERVICES: | | |  |  |
|  | | |
| STATE YOUR COMPANY GOALS: |  |  |  |  |
|  | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SELECT YOUR PRIMARY TARGET AGE GROUP(S):   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  | | 13-18 YEARS OF AGE | 18-23 YEARS OF AGE | 23-30 YEARS OF AGE | 30-45 YEARS OF AGE | 40-60 YEARS OF AGE | 60 AND ABOVE | | | |  | |  | |  | |
| WHAT PLATFORM HOSTS YOUR COMPANY WEBSITE? | | |  | |  | |  | |
|  | | | | |  | |  | |
| WHICH ADVERTISING PLATFORMS DOES YOUR COMPANY UTILIZE? | | | | |  | |  | |
|  | | | | |  | |  | |
| WHO ARE YOUR PRIMARY COMPETITORS? |  | |  | |  | |  | |
|  | | | | |
| WHAT IS YOUR MONTHLY BUDGET FOR ADVERTISING AND DIGITAL MARKETING? | | | | |  | |  | |
| $0.00 | | | | |  | |  | |
| WHICH SELLING PLATFORMS DO YOU USE? |  | |  | |  | |  | |
|  | | | | |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| HOW CLOSE IS YOUR COMPANY TO ACHIEVING ITS STATED GOALS? | | | |  | |  | |
|  | | | |  | |  | |
| WHAT ARE YOUR PRIMARY MARKETING GOALS?   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  | | INCREASE  MARKET SHARE | INCREASE REVENUE | EXPAND CUSTOMER BASE | GROW ACCOUNTS | IMPROVE SEARCH ENGINE RANKING | OTHER | |  | | |  |  | |
| WHAT SERVICES ARE YOU SEEKING?   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  | | CONTENT  MARKETING | WEBSITE DESIGN | SEARCH ENGINE OPTIMIZATION | BRAND  DEVELOPMENT | SOCIAL MEDIA MARKETING | PAY PER CLICK/SEM |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  |  |  |  |  |  | | DIGITAL STRATEGY | LEAD GENERATION | MOBILE MARKETING | EMAIL CAMPAIGNS | LANDING PAGE OPTIMIZATION | OTHER | | |  |  |  |  | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TARGET START DATE | | | | |  | |
| MM/DD/YY | | | |
| TARGET COMPLETION DATE | | | |
| MM/DD/YY | | | |
| ESTIMATED BUDGET FOR THIS PROJECT | |  |  |  |  | |
| $0.00 | | | |  | |  | |
| ADDITIONAL REQUIREMENTS OR COMMENTS |  |  |  |  |  | |
|  | | | |

|  |
| --- |
| **DISCLAIMER**  Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |