

ONLINE PRESENCE CLEAN-UP & TRANSFORMATION ONBOARDING QUESTIONNAIRE

SECTION 1 — BUSINESS INFORMATION

1. Full Name / Business Owner's Name
2. Business / Brand Name
3. Business Email Address
4. Phone Number / WhatsApp
5. Website URL (if any)
6. Business Address

SECTION 2 — BRAND IDENTITY 7. Describe your business in one sentence. 8. What products or services do you offer? 9. Who is your target audience? 10. What is your brand personality? 11. Do you have an existing brand style guide? 12. Upload your logos and brand assets.

SECTION 3 — CURRENT ONLINE PRESENCE

13. Which platforms do you currently use?
14. Paste all current profile links.
15. Do you have access to all accounts?
16. Upload login details (optional).

SECTION 4 — ONLINE PRESENCE CHALLENGES

17. Top 3 challenges with your online presence.
18. Areas needing urgent attention.
19. Have you run ads before?

SECTION 5 — GOALS & EXPECTATIONS

- 20. What do you want to achieve in 3 months?
- 21. Most important outcome.
- 22. Do you want an automated CRM system?

SECTION 6 — CONTENT PREFERENCES

- 23. Preferred content types.
- 24. Brands/pages you admire.
- 25. Tone of voice.

SECTION 7 — PLATFORM-SPECIFIC QUESTIONS

Facebook: Link + Goal

Instagram: Link + Preferred post style

LinkedIn: Link + Positioning

TikTok/YouTube: Video content plan

SECTION 8 — WEBSITE / LANDING PAGE

- 33. Do you have a website?
- 34. Website issues (if yes)
- 35. Landing page purpose (if no)

SECTION 9 — COMMUNICATION & REPORTING

- 36. Preferred contact method.
- 37. Best time to reach you.
- 38. Primary decision-maker.

SECTION 10 — LEGAL & PERMISSIONS

- 39. Permission to manage accounts.
- 40. Permission to create content.

SECTION 11 — FINAL NOTES

- 41. Additional info.
- 42. Upload other files.

Thank you for completing your onboarding!

We will contact you within 24 hours for your 90■minute kickoff session.