Client Onboarding Questionnaire

Send before the first call. Client: _____ Date: _____

1. What does your business do, and who are your customers?

2. What do you want this project to achieve?

3. How will we know it worked?

4. What exists already, and what isn't working?

5. Who is the audience for this work?

6. Examples you like (and why), and examples you don't.

7. What's the deadline, and is it fixed?

8. What budget range have you set aside?

9. Who gives feedback, and who gives final approval?

10. How do you prefer to communicate, and how often?

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