

Your business and customers

Tell us what you do, who you help and how you want to be seen.

Allow about 20 minutes. Short answers are welcome. Use a PDF reader that supports forms, save a copy, and return it privately. If something is unknown or not relevant, say so.

1. Business name, website and service area.

Include trading name and relevant locations.

2. Your name, role and best contact details.

Who will be our main day-to-day contact?

3. What do you sell, and which offers matter most?

Include typical prices and your main commercial priority.

4. Who is your ideal customer?

Where are they, what do they need, and why do they buy?

5. Why do customers choose you?

What makes your work different? What proof can we use?

6. How does someone become a paying customer?

For example: enquiry, quote, booking, deposit, sale. Where does it get stuck?

7. How should your business look and sound?

Give three words, examples you like, and anything to avoid.

Goals and direction

Be honest about the change you want. Estimates are fine.

Business / completed by: _____

8. What would make running the business feel better?

Less admin, more control, steadier income, better customers, or something else?

9. What would make the first 30 days worthwhile?

Choose one or two achievable priorities. What would you notice?

10. What would success look like after 90 days?

Give targets if you have them. We will agree realistic measures together.

11. Where do you want the business to be in 12 months?

Consider income, customers, team, services, locations and your own role.

12. What is happening now?

Approximate monthly enquiries, bookings/sales, sales value and marketing results.

13. How much more business can you handle?

Include spare capacity, lead times, busy periods and delivery limits.

14. What are the biggest problems to fix first?

Rank your top three. Include anything already working that we should protect.

Content and existing systems

Provide links where possible. Do not put passwords or customer records in this form.

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15. Where can we find your brand assets and real photographs?

Share a folder link. Include logos, fonts, colours and your best work.

16. What can we talk about over the next three months?

Offers, dates, products, expertise, FAQs, stories, existing blogs and seasonal changes.

17. Who will provide material and business updates each month?

Name the person and a realistic supply date. Flag any missing photos or assets.

18. Which systems do you use today?

Website, booking/shop, payments, CRM, inbox, calendar and any automations. Include plan names if known.

19. Which social and advertising accounts do you use?

List profile links, Meta/Google ad accounts, who owns them and who has admin access.

20. What is the current state of your email marketing?

Platform, list size, how people subscribe, last send, usual frequency and any existing sequences.

21. What reporting and tracking is already set up?

GA4, Search Console, ad tracking and booking/sales reports. Tell us if you are unsure.

Budget, approval and starting

These answers help us scope work you can sustain and agree how decisions get made.

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22. Which package are you considering, and what can you budget?

Essentials £499 / Growth £1,199 / Business Partner from £2,499 monthly. Setup is separate.

23. What can you comfortably spend on advertising each month?

Separate from our fee: current spend, proposed starting amount and firm monthly ceiling. £0 is fine.

24. Is there a separate budget for software or production?

Email/booking subscriptions, filming, website projects or other support. Note existing costs.

25. Who approves content, campaigns and factual claims?

Name, email, backup approver and a realistic approval turnaround.

26. What may we do routinely, and what needs your approval?

Include budget changes, inbox replies, booking changes and who handles complaints/refunds.

27. What must we avoid or check before publishing?

Restricted claims, sensitive subjects, image/testimonial permissions and existing agency commitments.

28. When would you like to start, and what else should we know?

Include deadlines and anyone else who needs to join the onboarding meeting.