

Client Onboarding Questionnaire: Product, Business, and Marketing

Sections

1. [Your Product and Service]
2. [Your Business Model]
3. [Your Online Marketing]

Your Product and Service

1. What does your business do?
2. What are your best selling products?
3. What problem does your service/product solve?
4. What makes this product/service unique? Why would someone buy from you versus buying from anyone else or versus doing nothing at all?
5. What is the most common result your customer gets from using your product/service?
6. Who are your main competitors?

Your Business Model

1. How are you currently selling your product and service?
2. Please list your annual revenues for the last 3 years
3. What is your current monthly revenue?
4. What is your average annual profit margin?
5. What is your Average Customer Lifetime Value?
6. What is the Average Value of the single order people make with you?
7. How many different offers do you have?
8. What are your best-selling offers?
9. What are your business goals for this year?



Your Online Marketing

Social media & Websites (Add links where applicable)

Facebook Page:

Facebook group:

Instagram:

Business Website:

Blog:

Marketing landing and sales page(s):

1. How many people visit your website each month?
2. What are the most frequently visited pages on your website?
3. Where do the visitors come from? Try to define traffic sources and be specific
4. Are you running Facebook advertising?
5. Are you running any other marketing initiatives to boost sales?
6. What marketing software are you using right now?