

# WELCOME ABOARD

New Client Interview and Intake

Prepared for:



TABLE OF CONTENTS

INTRODUCTION .....2

POINTS OF CONTACT .....3

BUSINESS INFORMATION..... 8

WEBSITE INFORMATION ..... 10

ADMINISTRATIVE INFORMATION.....12

HUBSPOT INFORMATION ..... 19

ADDITIONAL ITEMS WE NEED FROM YOU .....21

## INTRODUCTION

Welcome aboard!

We've put together this questionnaire to gather as much administrative information from you as we can to streamline the onboarding process.

Some of the information is pre-populated; we've done a little snooping around and grabbed what we could online to save you some time.

Here's what we need from you:

- Confirm the information we've entered is correct
- Add as much of the missing information as possible
- Send us everything you can get your hands on that will help us better understand your customers, your company and the industry as a whole

There may be some sections that you don't understand or simply don't apply – just leave them blank.

*Note:* Some of the stuff we're asking you for is sensitive information. Depending on the structure of your organization you may not be able to provide it – we get that. Just drop a note into the “Additional Comments” box for that line item and we'll figure out the best way to move forward.

We look forward to working with you!

**- Bonafide HQ**

## POINTS OF CONTACT

### Primary Contact

*Our main contact for coordinating marketing, meetings and logistics.*

Name:

Phone Number:

Email Address:

Additional Comments:

### Billing/Accounts Payable

*Our contact for questions about billing and invoices.*

Name:

Phone Number:

Email Address:

Additional Comments:

### Website Administrator

*Our contact for questions about your website.*

Name:

Phone Number:

Email Address:

Additional Comments:

## IT & Hosting

*Our contact for questions about DNS and hosting. If you have more than one party managing these please use the Additional Contacts section below.*

Name:

Phone Number:

Email Address:

Additional Comments:

## Email

*Our contact for questions about email setup and administration.*

Name:

Phone Number:

Email Address:

Additional Comments:

## Outside Marketing/SEO Agency

*If you have a 3<sup>rd</sup> party agency that you work with (or used to work with) that we'll need to talk to, list them here.*

Name:

Phone Number:

Email Address:

Additional Comments:

## Content Assistance & Approval

*Any contacts who can assist us in the development and approval of content.*

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Additional Comments:

## Project Stakeholders

*All contacts who would like to be included in meetings, reporting and/or communications.*

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Additional Comments:

## Additional Contacts

*Include any other relevant contacts we may need here. For example, your website developer or a member of your sales team.*

Name:

Role:

Phone Number:

Email Address:

Additional Comments:

Name:

Role:

Phone Number:

Email Address:

Additional Comments:

Name:

Role:

Phone Number:

Email Address:

Additional Comments:



## BUSINESS INFORMATION

*The information you provide in this section will be used in hundreds of business directories across the web – so please make sure it's accurate. This information is for your primary location; if your organization has multiple locations, please complete and append the information for each location to this document.*

### Company Information

Company Name:

Company Address:

Previous Addresses & Phone Numbers:

*We'll use this to find and clean up old and outdated information online.*

Main Contact's Name:

*Whose name should we use to create directory listings?*

*Note: This person won't be contacted and their email won't be listed; it's just the name we'll associate with the listing.*

Local Phone Number:

Toll-Free Phone:

Main Business Email:

*Your customer-facing email to be listed on directories.*

Year Founded:

Business Hours:

Payment Methods Accepted:

Languages Spoken:

Business Category(s):

*Examples: Manufacturing, Healthcare, Technology.*

## Company Information (cont'd)

### Short Description (250 characters):

*Used for directory profiles. Briefly explain what you do.  
Include your main keywords (in moderation) and  
areas you serve.*

### Long Description (500 characters):

*A longer version of the description above.*

### Professional Associations:

*List any business or trade organizations and affiliations.*

### Certifications:

*List any professional or industry certifications.*

### Media:

*Featured on any major networks or websites?  
List them here.*

### Industry Events:

*List any major tradeshow, conferences, etc.  
for your industry (whether you participate or not).*

### Industry Publications:

*List the major magazines, websites, publications,  
forums and blogs for your industry.*

### Competitors:

*List 3-5 of your main competitors' websites.*

### Value Proposition:

*In 2-3 sentences, explain why someone should  
buy from you vs. your competitors. What makes  
you special?*

### Additional Comments:

## WEBSITE INFORMATION

### Domain Registration

*These are the administrative login credentials for the registrar of your domain. We may need this information to set up your marketing software. No changes will be made without your approval. Alternatively, please provide us with the contact info for the person who manages your domain.*

Username:

Email Address:

Password:

Additional Comments:

### Website Hosting

*These are the administrative login credentials for your current website hosting company or access to your server's cPanel. We may need this information to set up analytics or, if your email is hosted locally, to configure additional accounts. No changes will be made without your approval. Alternatively, please provide us with the contact info for the person who manages your hosting.*

Login URL:

Username:

Password:

PIN (if applicable):

Additional Comments:

## CMS (Content Management System) Login

*These are the administrative login credentials to your current content management system. We'll need this information to optimize your website for search engines and upload content.*

CMS Type:

Login URL:

Username:

Email Address:

Password:

Additional Comments:

## FTP Access

*These are the FTP login credentials to your server. We'll need this information to access your website files and upload content.*

Login URL:

Username:

Password:

Additional Comments:

## ADMINISTRATIVE INFORMATION

### Email Hosting

*These are the administrative login credentials for your current email provider. We may need this to set up additional email accounts for marketing. When we submit your business to directories you'll receive hundreds of confirmation emails and we want to keep them out of your inbox. No changes will be made without your approval. Alternatively, please provide us with the contact info for the person who manages your email.*

Login URL:

Username:

Password:

PIN (if applicable):

Additional Comments:

### IP Addresses for Exclusion

*For more precise analytics, we need to filter out website visits and activities from your company's employees. We do this by excluding their IP addresses from results. Your IT manager or systems administrator can provide these addresses. Alternatively, you can visit <http://www.whatsmyip.org> from your office computer. They typically have the following format: 12.345.678.910. Please list IP addresses for all company offices.*

IP Address:

IP Address:

IP Address:

IP Address:

Additional Comments:

## Google Analytics Access

*These are the administrative login credentials to your Google Analytics account. Alternatively, you can add Bonafide (email address [hq@gobonafide.com](mailto:hq@gobonafide.com)) as an Administrator on your account ([instructions here](#)).*

Username or Email Address:

Password:

Additional Comments:

## Google AdWords Access

*These are the administrative login credentials to your Google AdWords account (if applicable). Alternatively, provide us with your AdWords Customer ID ([instructions on how to find that here](#)) and we'll request managerial access to your account.*

Username or Email Address:

Password:

Additional Comments:

## Bing Ads Access

*These are the administrative login credentials to your Bing Ads account (if applicable).*

Username or Email Address:

Password:

Additional Comments:

## LinkedIn Login

*These are the administrative login credentials to a personal LinkedIn account that manages your company page. Company pages themselves do not have their own logins. We need this to connect your LinkedIn account to the marketing software. Alternatively, we can work with you to create a “dummy” account in order to access or create your company page.*

URL:

Username or Email Address:

Password:

Additional Comments:

## Facebook Login

*These are the administrative login credentials to a personal Facebook account which manages your company page. Business pages themselves do not have their own logins. We need this to connect your Facebook account to the marketing software. Alternatively, you can make Bonafide (under the name Alex Zinzei and email address [hq@gobonafide.com](mailto:hq@gobonafide.com)) an “admin” on the page ([instructions here](#)).*

URL:

Username or Email Address:

Password:

Additional Comments:

## Google + Login

*These are the administrative login credentials to your Google + company page. Alternatively, you can make Bonafide (email address [hq@gobonafide.com](mailto:hq@gobonafide.com)) an admin on your account ([instructions here](#)).*

URL:

Username or Email Address:

Password:

Additional Comments:

## Twitter Login

*These are the administrative login credentials to your Twitter account.*

URL:

Username or Email Address:

Password:

Additional Comments:

## YouTube Login

*These are the administrative login credentials to your company's YouTube channel.*

URL:

Username or Email Address:

Password:

Additional Comments:



## Additional Accounts

*These are the administrative login credentials to any additional accounts (advertising, social media, etc.) you think we might need access to.*

Account Name:

URL:

Username:

Email Address:

Password:

Additional Comments:

Account Name:

URL:

Username:

Email Address:

Password:

Additional Comments:

Account Name:

URL:

Username:

Email Address:

Password:

Additional Comments:

## Additional Accounts (cont'd)

*These are the administrative login credentials to any additional accounts (advertising, call tracking, social media, etc.) you think we might need access to.*

Account Name:

URL:

Username:

Email Address:

Password:

Additional Comments:

Account Name:

URL:

Username:

Email Address:

Password:

Additional Comments:

Account Name:

URL:

Username:

Email Address:

Password:

Additional Comments:

## Common Username & Password Combos

*In the event that we need to login to other business listing websites or directories online, please provide any common username and password combinations that we can try.*

Username:

Email Address:

Password:

Username:

Email Address:

Password:

Username:

Email Address:

Password:

Additional Comments:

## HUBSPOT INFORMATION

### HubSpot Users

*Please provide the names and email addresses for everyone who would like a HubSpot account.*

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Additional Comments:

## HubSpot Lead Notifications

*Please provide the names and email addresses for everyone who would like to be notified whenever a lead is generated. For example, when a prospect downloads an eBook or fills out a form on your website.*

Name:

Phone Number:

Email Address:

Name:

Phone Number:

Email Address:

Additional Comments:

## HubSpot Subdomains

*Please provide the preferred subdomain name for your marketing materials. A subdomain is a prefix to your main domain where we'll set up your landing pages and, if applicable, your blog. For example, <http://blog.examplesite.com>, where "blog" is the subdomain. Your subdomain name is purely a matter of personal preference and won't affect performance. Common subdomain names include: my, go, blog, info, web and offers.*

Landing pages subdomain:

Blog subdomain (if applicable):

Additional Comments:

## ADDITIONAL ITEMS WE NEED FROM YOU

*The more you can send us here the better. These items will help us understand things like your messaging, your current marketing and your value proposition. You can email us the info, upload it to your client portal, stick it in Dropbox or send it by snail mail.*

### Logo Files

Please provide all variations and in several formats including high resolution if available.

### Contact List(s)

Please provide a .csv file with a list of all the contacts we'll be importing into HubSpot. Multiple lists ok. Email address is required. First and last name preferred. Include as much data as possible and we'll trim down accordingly.

### Sales & Marketing Collateral

Please send us everything you can get your hands on. Examples include: Brochures, past newsletters, catalogs, reference material, event flyers and so on.

### Photos & Images

Please send any images we can use for marketing. Signage, interior and exterior office space, team pictures, events, profile pics, facilities and so on.

### Brand Standards Documentation

If you have any documentation specifying how your brand collateral should be used, send it our way.

### Customer & Market Research

Whether it's formal research or a bullet list in a Word doc – we want to see it. Any information you can provide us that will give us insight into your customers' demographics and purchase habits will be invaluable. Keyword lists, demographic info, buying objections – send 'em over!