**Client Onboarding Document for A2C Digital**

**Purpose:** This document is designed to gather critical information about your business, goals, and preferences to ensure A2C Digital can deliver tailored marketing solutions effectively. Please provide as much detail as possible. Once completed, this will serve as the foundation for our collaboration.

**Instructions:** Fill out each section thoroughly. If a question doesn’t apply, feel free to mark it as "N/A." If you’re unsure about any details, let us know, and we’ll assist you during our onboarding discussion.

**Submission:** Please return the completed document to [Agency Email] by [Due Date]. We’ll follow up with a call to review and clarify any points.

**Section 1: Basic Client Information**

**Goal:** Establish key contact and business details.

1. **Company Name:**
   * Full legal name of your business.
2. **Website URL:**
   * Include your primary website (e.g., [www.yourcompany.com](http://www.yourcompany.com)).
3. **Industry:**
   * What industry do you operate in? (e.g., e-commerce, healthcare, tech, etc.)
4. **Primary Contact Person:**
   * Name, job title, email, and phone number.
5. **Secondary Contact Person (if applicable):**
   * Name, job title, email, and phone number.
6. **Business Address:**
   * Physical location (if applicable) or mailing address.
7. **Preferred Communication Method:**
   * Email, phone, Slack, etc., and any specific times for availability.

**Section 2: Business Overview**

**Goal:** Understand the client’s business model, audience, and market position.

1. **Business Description:**
   * In 2-3 sentences, describe what your company does, your products/services, and your unique value proposition.
2. **Target Audience:**
   * Who are your ideal customers? Include demographics (age, gender, location, income level) and psychographics (interests, behaviors).
3. **Competitors:**
   * List 2-3 main competitors and their websites. What do they do well, and where do you stand out?
4. **Current Market Position:**
   * How do you see your business in the market? (e.g., industry leader, new entrant, niche player)
5. **Business Goals:**
   * What are your short-term (6-12 months) and long-term (1-3 years) business objectives?

**Section 3: Marketing Background**

**Goal:** Assess the client’s current marketing efforts and resources.

1. **Current Marketing Channels:**
   * Which channels are you using? (e.g., social media, email, SEO, paid ads, etc.)
   * Provide specific platforms (e.g., Instagram, Google Ads).
2. **Marketing Team/Resources:**
   * Do you have an in-house marketing team? If yes, how many people and what are their roles? If no, who handles marketing currently?
3. **Past Marketing Efforts:**
   * What campaigns or strategies have you tried in the past 12 months? What worked well, and what didn’t?
4. **Existing Marketing Assets:**
   * Do you have branding materials (logo, style guide, fonts, etc.), content (blogs, videos), or other assets we should know about?
5. **Current Marketing Budget:**
   * What’s your monthly or annual marketing budget (rough estimate)? Are there specific allocations (e.g., ads, content)?

**Section 4: Project Goals and Expectations**

**Goal:** Define what the client wants to achieve with the agency.

1. **Primary Marketing Goals:**
   * What are your top 3 marketing objectives? (e.g., increase brand awareness, drive sales, grow email list)
   * Include measurable targets if possible (e.g., “increase website traffic by 20% in 6 months”).
2. **Key Performance Indicators (KPIs):**
   * How do you measure success? (e.g., leads generated, ROI, engagement rate)
3. **Project Scope:**
   * What specific services are you expecting from us? (e.g., social media management, PPC, content creation, SEO)
4. **Timeline:**
   * When do you want to start? Are there specific deadlines or campaigns tied to dates (e.g., product launch in Q3)?
5. **Budget for Agency Services:**
   * What’s your budget range for working with us? (e.g., $2,000-$5,000/month)

**Section 5: Brand Identity and Voice**

**Goal:** Align the agency’s work with the client’s brand.

1. **Brand Personality:**
   * How would you describe your brand’s tone and voice? (e.g., professional, playful, authoritative)
2. **Brand Values:**
   * What are the core values your brand stands for? (e.g., innovation, sustainability, customer-first)
3. **Visual Identity:**
   * Do you have a logo, color scheme, or design preferences? If yes, please attach or provide links to examples.
4. **Tagline/Slogan:**
   * Do you have a current tagline? If not, would you like us to suggest one?
5. **Content Preferences:**
   * Are there specific styles or formats you prefer for content? (e.g., short videos, long-form blogs, infographics)

**Section 6: Technical and Access Details**

**Goal:** Ensure the agency has the necessary access to execute campaigns.

1. **Website Access:**
   * Can you provide admin access to your website (e.g., WordPress, Shopify)? If yes, list platforms and login details (or note if you’ll share later securely).
2. **Social Media Accounts:**
   * List all social media platforms you use and whether we’ll need access (e.g., admin, editor roles).
3. **Analytics Tools:**
   * Do you use Google Analytics, Facebook Pixel, or other tracking tools? Please provide access or confirm we’ll set them up.
4. **CRM/Email Platforms:**
   * What tools do you use for customer management or email marketing? (e.g., HubSpot, Mailchimp)
5. **Third-Party Vendors:**
   * Are there other vendors/partners we should coordinate with? (e.g., web developer, PR agency)

**Section 7: Additional Information**

**Goal:** Catch any miscellaneous details or preferences.

1. **Pain Points:**
   * What marketing challenges are you facing right now? (e.g., low conversion rates, inconsistent branding)
2. **Inspiration:**
   * Are there brands or campaigns you admire that we can draw inspiration from?
3. **Decision-Making Process:**
   * Who will approve deliverables or provide feedback? How quickly can we expect responses?
4. **Anything Else?**
   * Is there anything we haven’t covered that you’d like us to know?

**Next Steps**

Once you submit this document, A2C Digital will:

1. Review your responses and prepare follow-up questions if needed.
2. Schedule an onboarding call to discuss your goals and finalize the strategy.
3. Provide a tailored proposal and timeline based on your input.

Thank you for taking the time to complete this onboarding document! We’re excited to partner with you and drive results for [Client Company Name].