



Steal This :: My Client Onboarding Questionnaire

CONTACT DETAILS OF PRIMARY CONTACT
Name
Address
Phone Number
Email Address
Preferred method of communicating: <input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> SMS/Text <input type="checkbox"/> Instant Messaging (Facebook) <input type="checkbox"/> Ismail (LinkedIn)
YOUR BUSINESS BACKGROUND
How many years have you been in business?
How many people are on your team (can include your virtual team of subcontractors).
What is your annual revenue?
How many hours a week do you currently spend on work?
How many hours a week would you like to work (in a perfect world?)
CELEBRATIONS + CONNECTIONS
Birthday (day/month):
Twitter Handle:
LinkedIn:
Facebook:
Instagram:
Other:
TECH TOOLS
Phone <input type="checkbox"/> iPhone <input type="checkbox"/> Android <input type="checkbox"/> Windows

Computer

- ☐ PC
- ☐ Mac

Accounting/Bookkeeping

- ☐ Quickbooks Online
- ☐ Quickbooks Desktop
- ☐ Freshbooks
- ☐ Xero
- ☐ Wave
- ☐ Spreadsheet
- ☐ None
- ☐ Other: _____

Project Management

- ☐ Trello
- ☐ Teamwork
- ☐ Asana
- ☐ Spreadsheet
- ☐ None
- ☐ Other: _____

Contact Relationship Manager (CRM)

- ☐ Pipedrive
- ☐ Hubspot
- ☐ Insightly
- ☐ Spreadsheet
- ☐ None
- ☐ Other: _____

Cloud Storage

- ☐ Dropbox
- ☐ Google Drive
- ☐ iCloud
- ☐ Box
- ☐ None
- ☐ Other: _____

Email

- ☐ Gmail
- ☐ Outlook
- ☐ Other: _____

Document Creation

- ☐ Google Docs.
- ☐ Microsoft Word
- ☐ Pages
- ☐ Other: _____

Digital Notebook

- ☐ Evernote
- ☐ OneNote
- ☐ None
- ☐ Other: _____

Back Up

- ☐ Carbonite
- ☐ BackBlaze
- ☐ Time Machine (Mac)
- ☐ External Hard Drive
- ☐ None
- ☐ Other: _____

Online Calendar

- ☐ Calendly
- ☐ Acuity
- ☐ ScheduleOnce
- ☐ None
- ☐ Other: _____

Video Conferencing/Webinar

- ☐ Zoom
- ☐ Join Meeting
- ☐ Go To Webinar
- ☐ None
- ☐ Other: _____

Email Marketing

- ☐ Mailchimp
- ☐ Aweber
- ☐ ConvertKit
- ☐ Active Campaign
- ☐ Constant Contact
- ☐ None
- ☐ Other: _____

Business Suite

- ☐ Microsoft Office
- ☐ G Suite

Any other tools you use to run your business? Please list them here:

DEFINING SUCCESS

What would make this a successful project to your business? (use real metrics if possible ex. 50 more leads)