Customer Intake Form

innov8tive
BRAND MANAGEMENT
By ML Stuckey Consulting, LLC

BUSINESS CONTACT INFORMATION

COMPANY NAME

Legal Business Name: ML Stuckey Consulting, LLC

DBA Name: Innov8tive Brand Management

ADDRESS

PHYSICAL ADDRESS:

Street: 13715 Lewisdale Road

City: Clarksburg State: MD Zip: 20871

BILLING ADDRESS:

Street: 5257 Buckeystown Pike, Suite 184

City: Frederick State: MD Zip: 21704

PRIMARY CONTACT

Name: Monica Stuckey

Phone: 301-648-5022 Email: monica@mlstuckeyconsulting.com

SECONDARY CONTACT

Name: Claire Sperka

Phone: Email: ssperka@gmail.com

TARGET AUDIENCE

Who is/are your target audience?

How do your prospects currently find your company? How do you generate leads?

What is/are your audiences' goals when they come to the website?

COMPETITION

Who would you say are your three biggest competitors?

How does your company differentiate itself from these competitors?

DESIGN INFORMATION

DESIGN ARTIFACTS

Do you have a high-resolution version of your logo? Yes: ☐ No: ☐

Do you have high-resolution images you want used? Yes: ☐ No: ☐

COLOR PALETTE

Do you have specific colors that should be used for your online presence?

Color 1: _____

Color 2: _____

Color 3: _____

Color 4: _____

Color 5: _____

FONTS

Do you know the fonts used in your logo or online presence?

Font 1: _____

Font 2: _____

Font 3: _____

OTHER SITES

Are there other sites that you like that you would like to use to have your website or online presence modelled after?

WEBSITE

CURRENT WEBSITE

Website Address: _____

DOMAIN REGISTRAR:

Registrar Company: _____

Account Number: _____ User Name: _____

Password: _____ PIN: _____

Domain 1: _____

Domain 2: _____

Domain 3: _____

Domain 4: _____

WEB HOSTING:

Hosting Company: _____

Account Number: _____ User Name: _____

Password: _____ PIN: _____

EMAIL HOSTING:

Hosting Company: _____

Account Number: _____ User Name: _____

Password: _____ PIN: _____

WEBSITE ADMIN

Admin Panel URL: _____

Admin Username: _____ Password: _____

Web Platform:

☐ WordPress ☐ HTML ☐ Wix

☐ Drupal ☐ PHP ☐ Weebly

Theme/Framework: _____

FTP URL: _____

FTP Protocol: _____ Port: _____ Encryption: _____

FTP Username: _____ Password: _____

ECOMMERCE

MERCHANT ACCOUNT

Do you have a merchant account? ☐ Yes ☐ No

Provider: _____ UserName: _____

Password: _____ PIN: _____

Gateway: _____ UserName: _____ Password: _____

Secret Question: _____ Answer: _____

API Login ID: _____ Transaction Key: _____

Other Information: _____

What is the primary reason for taking funds through the website:

☐ Donations ☐ Membership ☐ Services

☐ Downloads ☐ Products ☐ Events/Tickets

☐ Other – Please specify below:

WEBSITE SECURITY

Do you want site secured with SSL? ☐ Yes ☐ No

WEBSITE DISPLAY INFORMATION

Display email address on website? ☐ Yes ☐ No

Email Address: _____

Display phone number on website? ☐ Yes ☐ No

Phone Number: _____

Display Social Media links on website?

☐ Facebook ☐ Instagram ☐ Google+

☐ Twitter ☐ LinkedIn ☐ Youtube

☐ Other – Please specify below:

What pages should the website contain?

☐ Home ☐ About ☐ Products/Services

☐ Portfolio ☐ Gallery ☐ Contact

☐ Testimonials ☐ Blog ☐ Events

☐ Sitemap ☐ Privacy Policy ☐ Contact

☐ Other – Please specify below:

ONLINE PRESENCE

ONLINE ACCOUNTS

GOOGLE

Do you have a Google Analytics account? ☐ Yes ☐ No

UserName: _____ Password: _____

Do you have a Google My Business account? ☐ Yes ☐ No

Business Name: _____

UserName: _____ Password: _____

Or add monica.wack@gmail.com as a manager on your account. For instructions, visit: https://support.google.com/business/answer/3403100?hl=en

LISTING SERVICE

Are you listed with a business listing service? ☐ Yes ☐ No

Provider (Yext, Moz Local, BrightLocal): _____

UserName: _____ Password: _____

EMAIL MARKETING

Do you have an Email/Newsletter account? ☐ Yes ☐ No

Provider (mailchimp, constant contact, aweber): _____

UserName: _____ Password: _____

CRM

Do you have a CRM account? ☐ Yes ☐ No

Provider (HubSpot, Zoho, Contactually): _____

UserName: _____ Password: _____

SOCIAL MEDIA

ONLINE ACCOUNTS

FACEBOOK

Do you have a Facebook Business account? ☐ Yes ☐ No

Facebook Business URL: _____

Do you know how to add an admin? ☐ Yes ☐ No

If you cannot add an admin, please provide the Facebook owner's login credentials:

Email: _____ Password: _____

Additional Facebook Business Pages:

Facebook Business URL: _____

Facebook Business URL: _____

TWITTER

Do you have a Twitter Business account? ☐ Yes ☐ No

UserName: _____ Password: _____

INSTAGRAM

Do you have a Instagram Business account? ☐ Yes ☐ No

UserName: _____ Password: _____

PINTEREST

Do you have a Twitter Business account? ☐ Yes ☐ No

UserName: _____ Password: _____

LINKEDIN

Do you have a LinkedIn Business page? ☐ Yes ☐ No

LinkedIn Business URL: _____

Do you know how to add an admin? ☐ Yes ☐ No

If you cannot add an admin, please provide the LInkedIn owner's login credentials:

Email: _____ Password: _____

YOUTUBE

Do you have a YouTube Business channel? ☐ Yes ☐ No

Email: _____ Password: _____

GOOGLE+

Do you have a Google+ Business account? ☐ Yes ☐ No

Google+ Business URL: _____

Email: _____ Password: _____

SNAPCHAT

Do you have a Snapchat Business account? ☐ Yes ☐ No

UserName/Email: _____ Password: _____

VIMEO

Do you have a Vimeo Business account? ☐ Yes ☐ No

UserName/Email: _____ Password: _____

ADDITIONAL ACCOUNTS

ONLINE ACCOUNTS

YELP

Do you have a Yelp Business account? ☐ Yes ☐ No

Email/Username: _____ Password: _____

ANGIE'S LIST

Do you have an Angie's List Business account? ☐ Yes ☐ No

Email/UserName: _____ Password: _____

HOME ADVISOR

Do you have a Home Advisor Business account? ☐ Yes ☐ No

UserName: _____ Password: _____

TRIP ADVISOR

Do you have a Trip Advisor Business account? ☐ Yes ☐ No

UserName: _____ Password: _____

OTHER

Login URL: _____

UserName: _____ Password: _____

Login URL: _____

UserName: _____ Password: _____