

Platform & Document Access

- WordPress or CMS logins
- Google Analytics, Google Tag Manager, Search Console and other SEO tools
- Any other third party analytics and tracking tools
- CRM or Email marketing tools
- Facebook Business Manager and other social media tools
- Existing Strategy documents, Comms plans or Standard Operating Procedures (SOPs)
- Customer Personas, competitor analysis and other supporting research documents
- Style guides, tone of voice guides or other creative guidelines
- Dropbox or Google Folder of all branding, copy decks and/or image assets

Client Details

- Contact information and the primary point of contact for this project?
- What type of communication works best?
- What cadence should be used for Work In Progress (WIP) meetings?

Company Details

- What is the company's history and how did it get to where it is today?
- What is the vision for the company's future?
- What are the company's short, mid and long terms goals?
- What products/services does the company offer?
- What are the company's values?
- What are the main strengths and weaknesses of the current business model?
- What challenges and difficulties have been faced in the past?
- What is the company's Unique Selling Proposition (USP)?
- Who are the competitors and what are their USPs?
- What seasonal patterns affect the business?

Target Audience / Customer Details

- Who is the target audience? What relationship does the company have with them?
- What specific actions/behaviors do we want them to take?
- What makes the target audience perform these actions? What decision factors do they have in their mind?
- What other associated challenges do the target audience have?
- How does the company or products solve the customers' problems?
- What frequently asked questions or recurring issues do customers have with the company?
- Describe the sales/buying process including up-sell/cross-sell strategy.

Project Details

- What is the overall business objective, goals and Key Performance Indicators (KPIs)
- How will this project drive the business goals?
- What are the project milestones and how are they connected to the business goals?
- What are the marketing metrics used to gauge success?
- What aspects of digital marketing is the project focused on?
- What is the budget?
- What are the timeframes for milestones and overall deadlines?

Previous Experience

- What has worked well in the past? Why?
- What hasn't worked well in the past? Why?
- Has a previous digital agency been engaged in the past? If so, what did they do?
- What were the results of previous agency work and was it successful?
- If the previous digital agency is no longer involved, why not?