

MARKETING PROJECT INTAKE FORM

CLIENT INFO:

NAME:

EMAIL:

PHONE:

BUSINESS NAME:

WEBSITE:

SERVICES REQUIRED:

AGENCY WEBSITE SEARCH ENGINE OPTIMIZATION ONLINE REPUTATION MANAGEMENT

PAY-PER-CLICK SOCIAL MEDIA MARKETING

PROJECT TYPE:

INDEPENDENT INSURANCE AGENCY/BROKER INSURANCE CARRIER

GENERAL INSURANCE AGENCY OTHERS (PLEASE SPECIFY BELOW)

PROJECT OBJECTIVES:

- AGENCY IS GROWING AND WE WANT TO CONTINUE THE MOMENTUM ONLINE
- AGENCY IS STABLE AND WE ARE LOOKING TO ACQUIRE NEW CLIENTS ONLINE
- AGENCY WEB PRESENCE IS LACKING AND WE NEED A STRATEGY FOR GROWTH
- EVERYTHING IS FINE, WE JUST WANT TO ADD SOME ADDITIONAL SERVICES
- OTHERS (PLEASE SPECIFY BELOW IN COMMENTS)

PROJECT DESCRIPTION:

PROJECT UVPs:

TARGET CITIES & ZIP CODES:

THREE MAIN COMPETITORS:

TARGET MARKET/TYPICAL CUSTOMER:

AVG. CUSTOMER VALUE:

TARGET START DATE:

TARGET END DATE:

MONTHLY BUDGET RANGE:

LINKS TO SOCIAL/LISTING ACCOUNTS:

ADDITIONAL REQUIREMENTS:

CONTACT POINTS:

COMPANY REPRESENTATIVE NAME:

COMPANY REPRESENTATIVE EMAIL ADDRESS:

COMPANY REPRESENTATIVE PHONE NO.: