Onboarding Form - Template Questions For Google Form

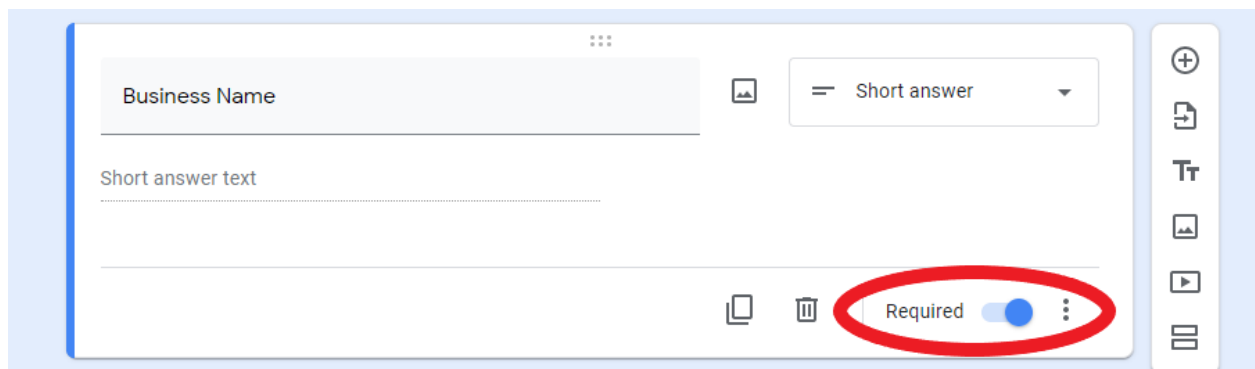## Example onboarding form - https://forms.gle/98K7mAnPpjqpbGWHA

Title: Onboarding Process - Facebook Ads
This Questionnaire Is Designed To Streamline The Onboarding Process

Section 1: Essential Information (We Cannot Start Work Until You Fill In This Section)
We cannot start work until you fill in all of these questions.

Important - In section 1, ensure all questions have the required field turned on.

Business Name

Daily Ad Budget

Confirm Website URL (Please include any specific URL's we need to use in our ads):

Provide A Google Drive Link With Existing Creatives Here (include logo files, plus any images/video you think will be helpful. The more, the better). Ensure the Google Drive link has open sharing so we don't have to request access:

I confirm the Google Drive link above has open sharing enabled, so we don't have to wait to request access.

What Locations/Countries Do You Wish To Target?

I confirm I have shared access to the Facebook Ad Account, Facebook Pixel, Facebook Page & Instagram Page. I acknowledge that work cannot commence until full access has been granted.

What Is Your Breakeven ROAS or Cost Of Goods/Services (if applicable):

Provide Discount Codes; 10%, 20% 25% & 30% etc. If No Discount Code, Type N/A. (We recommend discount codes where possible to get the highest returns from retargeting campaigns).

Are There Any Specific Products/Services You Want To Advertise? If so, link below. If not, type N/A.

In section 2, it isn't necessary to have the required field on.

Section 2: Information & Details
Tell Us About Yourself.

Contact Name(s):

Email Address(es):

Time Zone:

Main Website URL:

Ad Account ID:

Goals:

Section 3: Understanding Your Business
Help Us Understand Your Business

List Your Competitors:

What Are Your Best-Sellers? (If Applicable):

What Search Keywords Relate To Your Business:

3 Key Selling Points For Your Products:

Section 4: Customer Lists
You should be able to use your CRM to export this data. Select the 'Amount Spent' or 'LTV' feature to export how much they've spent with you as well.

If you have a separate list of purchasers then please include this.

Provide Any Customer Lists/Subscriber Lists/Buyer-Specific List (Excel Doc or CSV File):

Section 5: Customer Avatar
Let's Learn More About Your Ideal Customer. Who typically buys your products?

Target Audience Age:

Target Audience Gender:

Is This Audience Afraid Of Anything In Particular?

What Makes This Audience Angry? Who Are They Angry At?

What Trends Are Relevant To This Audience?

What Do These People Truly Desire?

Do The Majority Of People In This Audience Approach Decisions With A Particular Mindset/Bias? (Analytical/Skeptical/Casual)

Do Your Audience Have A Specific Vernacular/Language And Lingo?

Have You Noticed Patterns In Your Customers Previously? If So What Are They?

Section 6: URL Master List
This Will Help Us Save Time And Avoid An Inefficient Onboarding Process.

(Include Facebook/Instagram/Youtube Links If You Have Them):

Provide A List Of Important URLs That You Believe We Will Need:

Section 7: Logins & Passwords
If appropriate, please include any relevant logins and passwords.

Enter Any Logins & Passwords In The Space Below:

Section 8: Slack Emails
Please enter the email you will be using for Slack so I can invite you to our private channel.
If you'd like anyone else in the chat, please add their emails here too. Usually 1-2 people is fine.

Enter Slack Emails:

Section 9: Preferences & Final Details
The Finishing Touches

Provide Any Branding Guidelines Or Preferences That You Would Like Us To Follow:

Is There Any Further Information That You Want To Share With Us Regarding Your Business?

Is There Anything That You Believe Will Help Us In Our Marketing Efforts?