

# 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.: