

Basic Package Client Onboarding

Contact Information

Your Name	
Business Name	
Business Website	
Best Phone Number to Reach You	
Is it okay to text you?	
Contact Email	
Billing Email	
Interest in setting up autopay?	

Login Information

Facebook Login Email	
Facebook Password	
Name of Business Page	
Twitter Username	
Email Used for Twitter	
Twitter Password	



Email used for LinkedIn	
LinkedIn Password	
Google+/Google My Business Login (Gmail Login Works)	
Hootsuite Login Email	
Hootsuite Password	

Other Questions

What platforms do you want your posts to go to?

In the Basic Package 3 of the four platforms are included: Facebook, Twitter, LinkedIn and Google+. To do all four, a Hootsuite Pro or a Buffer Awesome Account must be purchased by the client which generally runs \$10 to \$15 per month. Other platforms such as Instagram and Pinterest are not included in the basic package but can be added for additional charges.

- Facebook
- Twitter
- LinkedIn
- Google+



Do you want your posts to be written as a single person ("I" statements versus "we" statements)? Do you want it to be written in the first person or third person. ("I recommend this service" vs. "Bill recommends this service.")

About Your Business:

What category best describes your business?

What is your service area?

Who is your ideal client?

What key words do you like to use for your business?

What are some current trends in your area of expertise?



Does your business have a certain niche?

What information do your clients need to know? What kinds of things would they find interesting?

How do you want clients to connect with you (phone, email, website contact)?

Is there anything else that we need to know when writing your posts?

