1. Welcome

What you'll need

- Logo files and brand colors or fonts, if you have them.
- Photos of real work, products, your team or workspace — phone photos are fine.
- Domain and registrar details, plus access to Google and Meta accounts.
- Your services, hours, real reviews and content approval contact.

Welcome

Thanks for choosing Digital Growth Studio. This form helps us get to know your business: who you are, what your brand looks like, what you offer and what you want more of. We'll use it to plan your website and marketing.

- It takes about 20 to 30 minutes. You don't need to finish in one go.
- Only four things are required: business name, contact person, email and phone.
- Skip anything you're unsure of. A rough answer is better than none, and we'll fill gaps together on a call.
- You don't need a website or social media to start. Many of our clients are starting from scratch.
- We never ask for passwords here. When we need access to an account, we'll send you a secure invite.

Printable blank intake. Fields marked * are required. Keep this copy for your records.

2. Business basics

Business name *

What customers call you

Legal name (if different)

e.g. Oak Street Services, LLC

Main contact person *

First and last name

Their role

Owner, office manager…

Email *

you@example.com

Phone *

Best number to reach you

Business address

Street, city, state, ZIP

We work from home, so don't show our address publicly

- [ ] We work from home, so don't show our address publicly

Service area

Cities, counties or ZIP codes you cover, or a radius like "30 miles around Nashville"

Business hours

- [ ] Regular set hours
- [ ] By appointment
- [ ] 24/7 / emergency service
- [ ] Set hours plus after-hours emergencies

Hours details

e.g. Mon–Fri 7–5, Sat 8–12

Years in business

e.g. 12

Number of employees

Including you

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3. Your brand today

Do you have a logo?

☐ Yes, and we like it ☐ Yes, but it needs a refresh ☐ No, not yet

Brand colors (pick or paste hex codes, skip if unsure)

Main color

#1A4C8B

Second color

#1A4C8B

Accent color

#1A4C8B

Don't know the codes? Describe your colors

e.g. navy blue and orange, like our signs

Fonts you use (if you know)

e.g. Montserrat, or "not sure"

Tagline or slogan

e.g. Local service, lasting care

How should your brand sound? Pick any that fit

☐ Friendly ☐ Professional ☐ Honest ☐ Hometown / local ☐ Family-owned ☐ Expert ☐ Fast and responsive ☐ Premium ☐ Affordable ☐ Bold ☐ Calm and reassuring ☐ Fun

Other words that describe you

Optional

Brands or competitors you like, and why

Websites, signs or ads that caught your eye. Local or national, any industry.

Your logo, brand guide and photos

Logo files

Attach or provide your logo files.

Photos of real work, products or your team

Attach or provide photos of real work, products or your team.

Links to your files

Paste Google Drive, Dropbox or website links, one per line

What do you have ready to share?

- [ ] Logo file (high quality)
- [ ] Brand guide or style sheet
- [ ] Team photos
- [ ] Workspace or vehicle photos
- [ ] Job / work photos
- [ ] Before and after photos
- [ ] Storefront or office photos
- [ ] Customer reviews or testimonials
- [ ] Videos

Tap everything you already have, even if it's not organized yet.

4. Online presence today

None of this is required. If you're not online yet, that's normal. Just skip what doesn't apply.

Website address (if you have one)

www.yourbusiness.com

Do you have a Google Business Profile?

☐ Yes ☐ No ☐ Not sure

Google profile link (if handy)

Paste from Google Maps

Facebook page

Link or page name

Instagram

@handle

Other social profiles

TikTok, YouTube, Nextdoor, LinkedIn…

Monthly Growth Plan — $500/mo, billed monthly: Hosting, 3 core social posts per week adapted across Facebook, Instagram, Google Business Profile, LinkedIn, Threads, Pinterest, TikTok and YouTube; branded graphics and short-form video; 1 landing page, 1 newsletter reviewed before sending and 1 blog article per month. Content follows your brand kit, with creation, scheduling and publishing handled by DGS. https://dgsgrowth.com/pricing

Where do customers leave you reviews today?

☐ Google ☐ Facebook ☐ Yelp ☐ Angi ☐ BBB ☐ Nextdoor ☐ HomeAdvisor ☐ Thumbtack

Roughly how many reviews, and your rating (if you know)

e.g. about 40 on Google, 4.8 stars

Email customers use to reach you

office@…

Do you have an email at your own business domain (like you@yourbusiness.com)?

☐ Yes, through Google / Google Workspace ☐ Yes, through Microsoft / Outlook ☐ Yes, other provider or not sure

☐ No, I use a free Gmail / Outlook / Yahoo address ☐ Not sure

How do new customers find you today?

- [ ] Phone calls
- [ ] Referrals / word of mouth
- [ ] Repeat customers
- [ ] Walk-ins
- [ ] Website form
- [ ] Google search or Maps
- [ ] Facebook / Instagram
- [ ] Signs, flyers or branded vehicles
- [ ] Paid lead services

Anything else?

Optional

Anything you've tried before that didn't work?

A past website, ads, lead services, an agency… and what went wrong. This helps us avoid repeating it.

5. Services and content

Your main services

Service 1

e.g. consultations, installations or custom orders

Price range (optional)

Leave blank if you'd rather not say

Short description

One or two sentences in your own words

Add more entries on an extra sheet if needed.

The one service you most want to promote

e.g. your most-requested service or product

What makes you different from other companies?

Why do customers pick you? Speed, honesty, family-owned, upfront pricing…

Guarantees or warranties

e.g. your satisfaction policy or written warranty

Certifications and licenses

e.g. professional license, insurance or industry accreditation

Do you offer financing?

☐ Yes ☐ No ☐ Thinking about it

Financing details

Provider or terms, if you know

Questions customers ask you all the time

Question 1

e.g. What should I expect at my first appointment?

Your usual answer

How you'd answer on the phone

Add more entries on an extra sheet if needed.

Customer testimonials you have

Paste a few real reviews or kind words, with the customer's first name if they're OK with it, or tell us where to find them.

Your story

How did the business start? Who's behind it? What do you care about? Plain words are perfect.

6. Goals and customers

Who is your ideal customer?

e.g. nearby residents, busy families, visitors or local businesses…

Your top 3 goals

- [ ] More phone calls
- [ ] More bookings or sales
- [ ] More online reviews
- [ ] Look more professional online
- [ ] Show up on Google
- [ ] Follow up with leads faster
- [ ] Bring back past customers
- [ ] Grow one specific service
- [ ] Get more from social media
- [ ] Hire new staff

Pick up to 3.

A goal that isn't listed

Optional

What would success look like 90 days from now?

e.g. more inquiries in the slow season, 25 new Google reviews

Busy and slow seasons

When are you slammed, and when do you need more work?

What monthly marketing budget feels comfortable?

Type a range or "not sure yet". This just helps us suggest the right starting point.

7. Getting ready

Many great businesses grow for years on word of mouth. These questions help us make the jump smooth for your team.

What's held you back from doing more online so far?

- [ ] Not sure where to start
- [ ] Too busy running the business
- [ ] Tried before and it didn't work
- [ ] Worried about cost
- [ ] Can't handle more leads right now
- [ ] Don't have photos or content
- [ ] Not comfortable with tech
- [ ] Word of mouth has been enough

Anything else?

Optional

When new calls, texts and form requests come in, who will answer them?

Name and role, e.g. Sarah in the office

How comfortable are you texting customers?

- [ ] Very comfortable
- [ ] Somewhat comfortable
- [ ] Not comfortable yet

Are you open to asking happy customers for reviews?

- [ ] We already ask
- [ ] Happy to start
- [ ] Not sure how

Who approves your website and marketing content?

Name, and whether anyone else needs to sign off

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8. Access we'll need later

Never send passwords. Don't type passwords here or email them to anyone. When it's time, Digital Growth Studio will send you secure invites so you can give us access, and you can remove it at any time.

Domain name (where you bought your web address, like GoDaddy)

☐ I have the login ☐ Someone else manages it ☐ We don't have one ☐ Not sure

Google Business Profile manager access

☐ I have the login ☐ Someone else manages it ☐ We don't have one ☐ Not sure

Facebook page

☐ I have the login ☐ Someone else manages it ☐ We don't have one ☐ Not sure

Instagram

☐ I have the login ☐ Someone else manages it ☐ We don't have one ☐ Not sure

Current website host

☐ I have the login ☐ Someone else manages it ☐ We don't have one ☐ Not sure

Notes

e.g. "My nephew set up the website years ago" or "Not sure which email the Google profile is under"

9. Review and send

Your brand readiness snapshot

Review what you already have and what you still need.

Logo

☐ Have it ☐ Partly there ☐ Still need

Brand colors

☐ Have it ☐ Partly there ☐ Still need

Photos

☐ Have it ☐ Partly there ☐ Still need

Content (services and your story)

☐ Have it ☐ Partly there ☐ Still need

Reviews

☐ Have it ☐ Partly there ☐ Still need

Website

☐ Have it ☐ Partly there ☐ Still need

Your answers

Review your contact details and all answers before completing your intake. Downloading or printing this copy does not submit it.