



North Star
Graphics and Promotions, LLC.



2018
**SOCIAL MEDIA
MANAGEMENT**
INTAKE FORM



Project/Client Information

Contact Name: _____ Company Name: _____

Contact Phone: _____ Contact Email: _____

Company Address: _____ City: _____ State: _____ Zip: _____

Collaboration Contact: _____ Title: _____

Collaboration Phone: _____ Collaboration Email: _____

What time zone are you in? _____

What are we helping you with? ☐ Content and scheduling posts ☐ Scheduling only (content provided)

How many networks are we managing/scheduling posts for? ☐ 1 ☐ 2 ☐ 3 ☐ 4

How many times per week are we posting content? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

How many time spontaneous posts per month? ☐ 0 ☐ 1 ☐ 3 ☐ 5

How many contests per year? ☐ 0 ☐ 1 ☐ 3 ☐ Other

How many ads per year? ☐ 0 ☐ <4 ☐ <6 ☐ <8 ☐ <10

Goals/Expectations: _____



Brand/Messaging

Client Specializes In: _____ Client is Known For: _____

Better than competition because: _____ Client is remarkable/unique because: _____

Current Tag Line: _____

Client Mission Statement: _____

Specify the marketable features of your product/service: _____



Client Deliverables

- | | | |
|----------------------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> High Res logo | <input type="checkbox"/> Office/Location images | <input type="checkbox"/> Marketing materials or promotions that will link to the site.
(e.g. print, newspaper advertising, etc.) |
| <input type="checkbox"/> 10 or more product images | <input type="checkbox"/> Other creative images | |

Current Web/Social Properties

Social Platforms Used: ☐ Facebook (FB) ☐ Twitter(TW) ☐ Instagram(IG) ☐ Google+(G+) ☐ LinkedIn(LI) ☐ YouTube(YT)

Website 1: _____ Website 2: _____

Blog URL: _____ Twitter: @_____ PW: _____

Facebook: _____ LinkedIn: _____ PW: _____

Google+: _____ PW: _____ Instagram: @_____ PW: _____

Pinterest: @_____ PW: _____ YouTube: _____ PW: _____

Other: _____ Other: _____

Do you require a Facebook, Twitter, LinkedIn and/or Google+ account set-up?

☐ Facebook (FB) ☐ Twitter(TW) ☐ Instagram(IG) ☐ Google+(G+) ☐ LinkedIn(LI) ☐ YouTube(YT)

Do you require a Facebook Welcome Page/Cover Image, Twitter Background and/or Google+ Brand Page?

☐ Facebook (FB) ☐ Twitter(TW) ☐ Instagram(IG) ☐ Google+(G+) ☐ LinkedIn(LI) ☐ YouTube(YT)

Are there established Hashtags already being used? Or that you want to use?

Content

Examples of other social pages to emulate: _____

Why are you establishing a social media presence?

☐ General Marketing (Marketing Plan) ☐ Website Traffic ☐ Product Placement
☐ Market Reach (Followers, Audience) ☐ Brand Marketing (Brand Awareness) ☐ Other _____

Any events or notable dates in the next 3 months?

When people search for your company on Google/Bing, what keywords do they use?

Audience/Competitors

☐ B2B ☐ B2C Current Effective Marketing Source(s): _____

Current Customer Demographic Profile: _____
(Age/Gender/Income/Locale/Etc. – Demographics/Psychographics – Who are the current customers?)

Target Demographic Profile: _____
(Age/Gender/Income/Locale/Etc. – Demographics/Psychographics – Who do you want to target?)

Top 3 Competitors: 1) _____ 2) _____ 3) _____

What is their most recent and memorable campaign? _____

Obstacles/Challenges

Known project obstacles/challenges related to client, market, industry or audience:

What tactics, if any, would you like to avoid? _____

Are there any friends/connections/companies you would prefer not to be affiliated with?

Is an approval process required for the publishing of content?

☐ Not Required ☐ 2-Week Publishing Calendar (14 Days) ☐ Monthly Publishing Calendar (30 Days)

By signing below, you agree to allow us access to any social media accounts you provided information for. You agree to allow us to act as an agency for your Facebook page, if applicable. The client is responsible for providing any specific posting data prior to approval of the content, if applicable. Otherwise, any specific dates or content should be provided 14 days prior to the first of the upcoming month unless you are utilizing a spontaneous post that is noted in your agreement. If you are providing the content, content needs to be provided no later than 7 days prior to the scheduled post date. You are agreeing to allow us to schedule posts using Hootsuite, therefore allowing Hootsuite to access your social media profiles. You also agree to provide the associated ad budget for any and all social media ads as agreed.

Contract Signed: ____/____/____ Signature: _____ Print Name: _____