**Platform & Document Access**

* WordPress or CMS logins
* Google Analytics, Google Tag Manager, Search Console and other SEO tools
* Any other third party analytics and tracking tools
* CRM or Email marketing tools
* Facebook Business Manager and other social media tools
* Existing Strategy documents, Comms plans or Standard Operating Procedures (SOPs)
* Customer Personas, competitor analysis and other supporting research documents
* Style guides, tone of voice guides or other creative guidelines
* Dropbox or Google Folder of all branding, copy decks and/or image assets

**Client Details**

* Contact information and the primary point of contact for this project?
* What type of communication works best?
* What cadence should be used for Work In Progress (WIP) meetings?

**Company Details**

* What is the company’s history and how did it get to where it is today?
* What is the vision for the company’s future?
* What are the company’s short, mid and long terms goals?
* What products/services does the company offer?
* What are the company’s values?
* What are the main strengths and weaknesses of the current business model?
* What challenges and difficulties have been faced in the past?
* What is the company’s Unique Selling Proposition (USP)?
* Who are the competitors and what are their USPs?
* What seasonal patterns affect the business?

**Target Audience / Customer Details**

* Who is the target audience? What relationship does the company have with them?
* What specific actions/behaviors do we want them to take?
* What makes the target audience perform these actions? What decision factors do they have in their mind?
* What other associated challenges do the target audience have?
* How does the company or products solve the customers’ problems?
* What frequently asked questions or recurring issues do customers have with the company?
* Describe the sales/buying process including up-sell/cross-sell strategy.

**Project Details**

* What is the overall business objective, goals and Key Performance Indicators (KPIs)
* How will this project drive the business goals?
* What are the project milestones and how are they connected to the business goals?
* What are the marketing metrics used to gauge success?
* What aspects of digital marketing is the project focused on?
* What is the budget?
* What are the timeframes for milestones and overall deadlines?

**Previous Experience**

* What has worked well in the past? Why?
* What hasn’t worked well in the past? Why?
* Has a previous digital agency been engaged in the past? If so, what did they do?
* What were the results of previous agency work and was it successful?
* If the previous digital agency is no longer involved, why not?