**CLIENT’S COMPANY NAME:**

**CLIENT’S FIRST AND LAST NAME:**

**To start with, let’s make sure we’ve got all the right contact info for you and the business:**

**CONFIRMING CONTACT INFORMATION:**

**Confirm Contact Info.**

* The best # to reach you on going forward is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* The best email address to reach you is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What email address should we list on the website & online directories?
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What email address(es) should website form submissions be sent to? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What is your preferred method of contact? \_\_ Email \_\_ Call \_\_ Text \_\_ Other
* The website we are going to be working off of is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Are there other points of contact that we will be working with? Please provide their information below (and indicate preferred method of contact):

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Email | Phone |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**CONFIRMING NAP (Name, Address, Phone #) DATA:**

* **Legal Business Name? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­\_**
* **Primary Business Phone Number? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	+ Is this a Physical Landline?
	+ OR is this a cell phone?
	+ **ALSO does this line have call tracking capability? YES/NO**
* **Primary Business Address? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	+ UPS Store?
	+ Virtual Office?
	+ True Physical Business Address?
	+ Residential?
	+ **AND is it being shared with any other business? YES/NO**
	+ **Can you receive mail at this location? YES/NO**
* **Any additional office locations? YES/NO**
	+ Location # 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
		- UPS Store?
		- Virtual Office?
		- True Physical Business Address?
		- Residential?
		- **AND is it being shared with any other business? YES/NO**
		- **Can you receive mail at this location? YES/NO**
	+ Location # 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
		- UPS Store?
		- Virtual Office?
		- True Physical Business Address?
		- Residential?
		- **AND is it being shared with any other business? YES/NO**
		- **Can you receive mail at this location? YES/NO**

NOTE: **IF you want** to have any additional locations optimized other than the main address, EACH additional location we work on has an additional monthly cost.

**COUPONS OR OFFERS**

Any Coupons/Special Offers you would like us to Add/Update on the site?

What specials or coupons would you like us to create or replace on your coupon page (if applicable).

First Name and Last Name, Title, and Email of the person in your office that schedules appointments or estimates

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ADDITIONAL BUSINESS INFO:**

**NEXT, a series of questions to learn more about the “behind the scenes” of your business:**

* Year founded?
* # of Total Employees \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* # of Technicians \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Forms of Payment Accepted:
	+ **Cash?**
	+ **Check?**
	+ Visa?
	+ American Express?
	+ MasterCard?
	+ Discover?
	+ **Any other credit cards?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Do you offer any Financing options?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NOTE: If you offer financing option and there is not much info on the website, send me a flyer of the details for financing so we can add it for them.

|  |
| --- |
| **OFFICE HOURS:*** **Available 24/7 for Emergency Services? Yes/No**

**ALSO, Certain listings will ask us for the office’s exact hours of operation**... (when someone will be in the office, even if you have a 24/7 answering service). Please provide your actual office hours, below:* M-F: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Sat: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Sun: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Special Hours (for Holidays, etc)?****License Number?****CALL TRACKING NUMBERS*** **Do you currently have any call tracking numbers on the site? YES/NO**
* **As part of our process we provide you with local numbers with the area code of your choice that will ring straight to your main line and record calls that come in.**
* **The purpose of this number is to:Provide you with a small sampling of recorded calls to help you determine:**
	+ **How the phones are being answered at your office**
	+ **To see what kind of questions customers are calling in with,**
	+ **To see what time of day customers are typically calling in, etc.**
	+ **Track Lead Sources to help calculate lead source ROI**

**Confirm area code you would like for Phone # we’ll be adding to the site’s header (usually the same as their main line): Area Code #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

**Google Drive or Dropbox – *GOOGLE PREFERRED***

* **Did you receive the shared folder invite we sent you? It should be from the email address (Paul@changescapeit.com)**
* **The shared folder is an image and file sharing site that allows you to share your company images and videos with our team and also allows you to add a description to help us designate the best place for it on the website.**
* **Please upload the following to the shared folder we created for this project:**
	+ **Logo: REQUIRED**
	+ **Headshot of the face of the company (usually owner): REQUIRED**
	+ **Any pics of your vans, technicians, office personnel, on site jobs, before and after pics, etc.**
	+ **Project pics you want featured on the website or through social media**
	+ **Any videos**
	+ **Any financing or service agreement informational flyers, etc.**
	+ **Any additional marketing materials (print ads, flyers, doorhangers, etc)**
	+ **Credibility/Trust Badges (Chamber logos, certifications, BBB, Angie’s List, Awards, Association Logos, etc)**

**---------------------------------------------------------------------------------------------------------------------------------**