

Arise Digital Solutions — Client Intake Form

For new clients · Complete and return before our kickoff call

Please complete every section of this intake form and return it within 5 business days of receiving your kickoff email. The information here drives your content strategy, your first 30-day calendar, and the access/setup steps our team takes on your behalf. Incomplete forms delay your kickoff and push the first publish date.

Brand Essentials

- Brand name (legal + customer-facing):
- Website URL:
- Primary social handles (Instagram / TikTok / Facebook / LinkedIn):
- Year founded:
- Current monthly revenue range (choose one): Under \$10k / \$10k–\$50k / \$50k–\$250k / \$250k–\$1M / Over \$1M
- Product categories (top 3–5 SKUs or lines we should feature most):

Ideal Customer Profile (ICP)

- Demographics — primary age range, gender skew, geographic concentration:
- Psychographics — top 3 values and the lifestyle signal that defines them:
- Top 3 customer pain points your brand already solves (in their words):
- Where they discover brands like yours (TikTok, IG creators, podcasts, search, friends, etc.):

Content Goals

- Primary goal for the next 90 days (awareness / leads / community / sales):
- 90-day KPI targets — followers gained, engagement rate, qualified leads/month:
- How you will define success at the 3-month mark:
- Launches, promos, or seasonal campaigns in the next quarter (dates + brief description):

Tone & Voice

- 3 adjectives that describe your brand's voice (e.g. warm, technical, irreverent):
- 3 adjectives that describe what the brand is NOT:
- 2–3 brands you want to look or feel like (links/handles):
- 2–3 brands you want to differentiate from (links/handles):
- 3–5 example posts you LOVE — paste links and tell us what works about each:

Approval & Contacts

- Primary decision-maker — name, title, email, phone:
- Content approver (if different) — name, title, email, phone:
- Finance / AP contact — name, email (for invoicing):
- Preferred approval turnaround in hours/days (we will hold publishing until this SLA elapses):

Reporting Preferences

- Stakeholders who receive the recurring performance report:
- Preferred cadence — weekly / bi-weekly / monthly:
- Preferred format — PDF deck / Loom walkthrough / email summary:
- KPIs that MUST appear in every report:

- KPIs that are nice-to-have but can be deprioritized:

Access & Logistics

- Who will provide Instagram / Facebook / TikTok business-manager access (name + role):
- Who will provide ad account access (Meta Ads Manager, TikTok Ads, Google Ads):
- Billing email for invoices:
- Time zone (please include any team members located elsewhere):
- Best days and times for recurring meetings (list 2–3 windows in your local time):

Return to evan@arisedigitalsolutions.com at least 5 days before kickoff. Incomplete forms delay your content calendar.