

Client Onboarding Questionnaire

Instructions:

Use this client onboarding questionnaire to gather information about your new clients. You can use the following pages to send the template directly to your clients, or copy the questions into a questionnaire or email.



Ready for a better way to gather client information?

With HoneyBook, you can build questionnaire templates that are easy to personalize and reuse for each new client.

Send the questionnaire via email, but capture all their answers inside the file to eliminate back-and-forth communication. Get started today with a free 7-day trial.

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Client Onboarding Questionnaire

Your information

Primary point of contact _____

Phone _____

Email _____

Preferred pronouns _____

Secondary point of contact _____

Phone _____

Email _____

Preferred pronouns _____

Address _____

Website URL _____

Facebook _____

Twitter _____

Instagram _____

TikTok _____

Additional social profiles _____

Your birthday _____

Client Onboarding Questionnaire

Project information

What timeframe do you have in mind?

What are your primary objectives for this project?

What metrics would you like to track?

Have worked on a similar project in the past?

Have you worked with a similar business in the past?

Will you be using any in-house resources for this project?

Client Onboarding Questionnaire

General information

How often would you like to receive project updates?

What is your preferred method of communication?

Describe your approval process

Will you need to share access with us? Please list software below.

Do you have inspiration or project examples you'd like to share?

Is there anything else you'd like to share at this time?
