

EXAMPLE AGENCY

Example client onboarding

Illustrative sample - names and answers replaced

CLIENT

Jamie Example

EMAIL

jamie@example.com

STATUS

Complete · 100% of required items

QUESTIONS

4 in this onboarding

Responses

01 What is your website address?

Required · Approved

https://oakandstone.example

02 Upload your project files

Optional · Approved

Attachment: example-file-01.txt

Attachment: example-file-02.txt

03 What are the main goals for this campaign?

Required - Approved

Generate more enquiries for our kitchen and bathroom installation services. We would like 15 qualified quote requests per month from homeowners in Leeds and the surrounding area.

04 Who is your target audience?

Required - Approved

Homeowners aged 35-60 within 20 miles of Leeds who are planning a kitchen or bathroom renovation. Focus on quality workmanship and a reliable, fully managed installation.