

Jolt Vivo Escribo

(Writing Life with a Jolt)

**New Prospect Intake Checklist Template**

**Make time for a conversation (about 20 minutes). What are 2-3 convenient times for availability. Will the decision-maker be involved?**

**I’ll be asking the following probing questions about your business/clientele. You may also ask questions.**

**1. “Tell me about your business** — what do you sell or offer?**”**

**2. “What’s the main business purpose of this particular project?”**

**3. “Who’s your typical customer/buyer?”**

**4. “What’s the biggest challenge you’ve been having with your marketing or copy?”**

**5. “What’s working now, and what frustrates you about your marketing/content?”**

**6. “What’s the competition for this product or service, and how are you different/better?”**

**7. “Who else is involved with this project for approvals, implementation?”**

**8. “What time frame are you working with?”**

**9. “Do you have a budget range in mind for this project?”**

**10.“Have we covered everything I need to know?”**

 **What I’ll do next. (Prepare and send your proposal via email)**

**Thank you for your time and for selecting Sharon Bennett’s Jolt-Vivo Escribo.**