

Client Onboarding Questionnaire

A completed discovery questionnaire for a fictional product-launch engagement.

Client	Atlas & Finch Homeware
Primary contact	Morgan Lee - morgan.lee@atlasfinch.example
Studio lead	Avery Chen - avery@northwind.example
Target launch	2026-10-19
Engagement	E-commerce discovery and launch campaign

1. Business context

What outcome should this engagement create?: Increase qualified product-page visits and give the internal team a reusable launch system for the autumn collection.

How will success be measured?: A 20% lift in collection-page engagement, 1,200 email sign-ups, and complete delivery of the reusable campaign toolkit.

What is the main constraint?: Photography is scheduled for 2026-09-08, so layouts must work with temporary product imagery until final selects arrive.

2. Audience and positioning

Primary audience: Urban renters aged 28-45 who want durable, compact homeware without a luxury price.

Core promise: Thoughtful everyday objects that fit smaller spaces and stand up to daily use.

Proof points: Five-year repair programme, FSC-certified packaging, modular sizing, and transparent material notes.

Avoid: Unverifiable sustainability claims, urgency-only copy, and imagery that makes products appear larger than their listed dimensions.

3. Scope and deliverables

- Campaign concept and message hierarchy
- Collection landing-page wireframe and final copy
- Six paid-social concepts in two aspect ratios
- Three-email launch sequence with subject-line variants
- Handoff guide with naming, accessibility, and measurement notes

4. Working agreement

Decision owner: Morgan Lee, Head of E-commerce

Feedback cadence: One consolidated review every Tuesday and Thursday by 15:00 ET.

Communication: Project board for decisions; email for approvals; video call only for kickoff and final review.

Accessibility baseline: WCAG 2.2 AA for colour, focus, structure, motion, and alternative text.

5. Kickoff checklist

- ☐ Contract and deposit confirmed
- ☐ Brand guidelines and font licences shared
- ☐ Analytics read-only access granted
- ☐ Photography folder and SKU list linked
- ☐ Legal reviewer and final approver named

Fictional completed sample. Replace the answers before using this questionnaire with a client.