

CRM File Information

CONTACT FORM

Unless otherwise specified, your lead capture will ask the following:

- First Name
- Last Name
- Email
- Phone
- Company Name
- Social Media: Instagram/Facebook/Pinterest
- Which services are you interested in?
- How did you find me/us?
- If referred, who should we thank?

Do you want any more questions on the lead capture?*

☐ Yes ☐ No

How do clients find you? Please list ALL referral sources you want to track (e.g. Facebook, Instagram, Google, etc.). If none, enter "none".

Choose file(s) to upload

or drag files here to upload

If yes, what else? (Remember, simple is better)



CONTRACTS

Which is true?*

IF THEY ARE ALREADY IN YOUR CRM SYSTEM

Please list all your current/active contracts for each of your services.

IF YOU NEED TO UPLOAD

Do so here.

Choose file(s) to upload

or drag files here to upload

QUESTIONNAIRE

Which is true?*

IF THEY ARE ALREADY IN YOUR CRM SYSTEM

Please upload anything you are currently using for this

Please list all your current/active questionnaires for each of your services.

questionnaire for reference/inspiration.

Choose file(s) to upload

or drag files here to upload



PROPOSAL

Your proposal should include necessary information about your company and services that doesn't change from project to project. For example, if you are a photographer with a process for weddings and a process for general sessions, this proposal will be used for both types of services, so please create a general process that works for both types of services, or leave that section blank. The questions below will help you provide content for the primary sections inside of your form.

The sections below are standard in all proposals and what we believe are must-haves or best practices. Please do not hesitate to write as much or as little as you want. If you do not want one of the sections below included in your proposal, please write N/A.

If you have questions or need clarity, please ask inside your Slack channel. We're here to help!

WELCOME + BIO

With this message, sell the reader a little more on why they should choose you and what they should expect while working with you. Maybe share a little about yourself so they can get to know you as well.

Add your bio below.*

EXAMPLE:

Hey! Amethyst here, your official brand and web expert. I absolutely love all things creative and helping passionate business owners breathe life into their brands. My journey as a creative has never been easy but I wouldn't change it for the world.

Your business has a story, and we're committed to building a unique and cohesive brand that will engage your ideal clients, command higher rates, and put you into the industry spotlight where you belong. The package breakdown below outlines Grit X Branding's best offering to increase customer engagement, sales and new clients.



TESTIMONIALS/REVIEWS/PORTFOLIO

Help your potential new clients make the final choice in hiring you by sharing some images of completed projects or happy words and results from previous clients. what they could be getting when working with you. Please be sure to include the client's name, it can be their first initial with their last name (J. Smith) or their first name with their last initial (Jane S.).

For portfolio photos, please upload them below. Be sure to name the photos that match your reviews so that we can put them together.

Review 1:*

Review 2:*

Review 3:

Review 4:

Choose file(s) to upload

or drag files here to upload



THE PROCESS

With multiple services, your timelines could differ from

EXAMPLE:

DISCOVER: We dive deep into discovering everything about your business, from the pain points to your dreams and goals for your business. This

with multiple services, your timelines could differ from package to package. However, you might have the same design process or project phases. Please try to compact your general process or project steps into 3-4 sections. They can be labeled for what happens: discover, create, implement, or simply by actions: step/phase 1, step/phase 2, step/phase 3.

Pro Tip: Do not add this booking stage as a part of your process. Your first step should be what happens after they are a client, such as homework they'll have or a meeting you'll schedule.

Step 1:*

Step 2:*

Step 3:*

Step 4:

phase lays the foundation for your Brand Identity and the strategy behind your Website Design. During this phase, it's important to define your Ideal Client and Target Market to create a strategy that you love and attract and convert your ideal clients.

CREATE: During this phase, we put our heads down and pen to paper to try out various styles, layouts, and all the things to see what designs strategically align best with you and your ideal client. At this point in the design process, there is minimal communication because there's a lot of work behind the scenes. When making your decisions on what aligns with your business and your ideal client, be sure to think from the viewpoint of a potential client or customer.

IMPLEMENT: Now that we've approved and finalized your designs, it's time to implement them into every aspect of your business. First, we work together to create a launch strategy that will maximize the profits during the launch. The goal is to get your potential clients excited. During this phase, we create lead magnets and collateral to increase the hype around the launch and really draw in potential customers or clients. This is the fun part, so who's ready to say cheers?



FAQS

Please list any frequently asked questions here with their answers. This section should try to give the reader responses to any **objections** they may have about working with you. Or give them information on what's next.

Question 1:*

Answer 1:*

Question 2:*

Answer 2:*

Question 3:*

Answer 3:*

Question 4:

Answer 4:

Question 5:

Question 6:



Answer 5:

Answer 6:

I agree that all of the information is correct and needs no further edits other than proofreading?*

☐

Yes

☐

No

THANK YOU FOR FILLING OUT THIS FORM.

I will email you if I have any additional questions.

Save Draft

Send

