**New Prospect Intake Checklist Template**

**Schedule a call (allow 20-30 minutes).**

**Ask probing questions, take great notes and, if possible, record the call.**

These questions, with minor modifications, will apply to just about any copywriting project.

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

This gets the prospect talking and shows you’re interested in the business.

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

Alternative version: “How do you hope to boost business through this project?”

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

Prompt the client to talk about buyer demographics, lifestyle awareness of the company, etc.

1. **“What is your typical customer/buyer’s biggest problem?”**

This will give you more in-depth information.

1. **“Have you done any market research on your customers/ buyers?”**

If so, ask for the research/results.

1. **“How, specifically, does your product or service help solve your customer/buyer’s biggest problem?”**

This may provide you with an outline of everything to cover in your copy.

1. **“What’s the biggest challenge you’re having with your marketing or copy?”**

Probe to discover the problem you can solve with your copywriting. If the project is related to a website, blog, or other online communication, offer to review it online during the conversation so you can ask follow-up or clarifying questions based on what you see.

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

Uncover clues that help you consider how you’ll propose to fix the “broken” aspects.

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

Determine how your prospect stands apart from the competition (or doesn’t).

1. **“Have you worked with freelance copywriters before?”**

You’re hoping the answer is yes because you don’t want to have to train a new client on the process of working with a freelancer.

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

This lets you know how many people are involved in the review process, who makes the decisions, and who creates the materials you’ll be working on. Have them identify who has final approval.

1. **“What time frame are you working with?” (When will they be ready to start and what’s the deadline?)**

This is important so you know if the expectations are realistic and will work with your schedule.

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

This lets you know if the client has a decent budget. You may also feel it’s time to explain your rates and how you’ll customize them based on the conversation and scope of work.

1. **“What is your preferred method of communication?”**

This could be phone, email, Zoom, Skype, etc. If they say text messaging or something similar, dive further to see if they expect you to be available 24/7.

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

This opens the door for more information or a wrap-up.

**Tell the prospect what you’ll do next.**

Explain that you know you can help the prospect. Even provide a few hints about HOW you can help, so the prospect is excited about getting a proposal from you. Then, prepare a proposal and send it via email within 24-48 hours.

**Thank the prospect.**

Let the prospect know you appreciate the inquiry!