



Client Onboarding Form

Everything we need to build your website

Welcome — we're excited to build your site. This form helps us learn about your business, your brand, and how you'd like your website to work. It should take about 20–30 minutes.

Leave anything blank. If you're not sure how to answer, skip it. We'll fill in sensible defaults based on your industry and share a demo — you can review and change anything before we launch.

A few sections require your involvement. Some services (calendar bookings, review widgets, Google Business Profile, email/domain setup) need you to sign in or complete a verification step we can't do for you. We'll flag what we need and ask you to complete those steps on your side.

This PDF is a guide, not a form you must fill. The easiest way to reply is a plain email to info@flextheweb.com with your answers **numbered to match the questions** below (for example, 1a. Business name — Acme Bakery). Skip anything that doesn't apply, and use as much or as little space as you need — email gives you room the boxes can't.

Prefer to fill the PDF? That works too — type into it in any PDF reader, or print, hand-write, and scan it back to info@flextheweb.com. Either way, attach your logo, photos, and any reference material in the same email.

1. Business basics

Business name

Owner / primary contact

Best email

Best phone

Business address (or “remote / by appointment”)

Year founded

Number of employees

Current website URL (if any)

2. What you do

One-sentence pitch — how would you describe your business to a stranger?

Top 3 services or products (most important first)

Who is your ideal customer? (age, location, what they need)

What makes you different from competitors?

Names or websites of 2-3 competitors

3. Website goals

Primary goal of the website (check the most important one):

- | | |
|---|---|
| ☐ Get phone calls / contact form inquiries | ☐ Book appointments online |
| ☐ Show a menu / services list | ☐ Build credibility so people trust us |
| ☐ Grow email list / newsletter | ☐ Promote events |
| ☐ Other (please describe below) | |

If "other," describe:

Features you want on the site (check all that apply):

- | | |
|---|--|
| ☐ Contact form | ☐ Online booking / calendar |
| ☐ Photo gallery | ☐ Customer testimonials / reviews |
| ☐ Blog or news updates | ☐ Events calendar |
| ☐ Newsletter signup | ☐ Google Maps + directions |
| ☐ Menu / service list | ☐ Team / staff bios |
| ☐ FAQ page | ☐ Live chat |

4. Brand & visuals

Logo

- ☐ I have a logo — I'll email the file (PNG, SVG, or AI preferred)
- ☐ I don't have a logo — please design one (**\$99 one-time**)
- ☐ I have a logo but want it refreshed (we'll quote separately)

Tagline or slogan (if you have one)

Brand colors — hex codes, Pantone, or “match my logo”

If you don't have brand colors, pick a palette direction:

- | | |
|---|--|
| ☐ Warm & inviting (earth tones, terracotta, cream) | ☐ Bold & modern (black, white, one bright accent) |
| ☐ Fresh & natural (greens, tans, soft blues) | ☐ Clean & professional (navy, gray, white) |
| ☐ Playful & bright (multi-color, high energy) | ☐ Luxury & elegant (deep tones, gold accents) |

Adjectives — pick 3-5 words that should describe how your site feels:

- | | | |
|--|--|--|
| ☐ Modern | ☐ Classic | ☐ Friendly |
| ☐ Professional | ☐ Playful | ☐ Serious |
| ☐ Warm | ☐ Bold | ☐ Minimal |
| ☐ Elegant | ☐ Rustic | ☐ Sophisticated |
| ☐ Trustworthy | ☐ Fun | ☐ Calm |
| ☐ Energetic | ☐ Approachable | ☐ Premium |
| ☐ Down-to-earth | ☐ Cutting-edge | ☐ Family-oriented |
| ☐ Youthful | ☐ Handcrafted | ☐ Reliable |
| ☐ Innovative | ☐ Community-focused | ☐ Efficient |
| ☐ Personal | ☐ High-end | ☐ Casual |

Any other words that describe your brand:

Font style preference:

- | | |
|--|---|
| ☐ Modern sans-serif (clean, tech-forward) | ☐ Classic serif (traditional, established) |
| ☐ Friendly rounded (approachable, casual) | ☐ Elegant display (luxury, editorial) |
| ☐ No preference — you decide | |

2-3 websites you LIKE (URLs + one line on what you like)

2-3 websites you DON'T like (URLs + one line on why)

5. Content you'll provide

Photos

- ☐ I'll send my own photos (email as attachments or share a Drive/Dropbox link)
- ☐ Please source stock photos that fit my brand
- ☐ A mix — I have some, please fill the rest with stock

Any must-have photo subjects? (e.g., our storefront, the team, specific products)

Written content

- ☐ I'll write my own page copy
- ☐ Please draft copy for me — I'll review and edit

Testimonials or reviews to feature (paste text + customer first name)

Heads up — testimonials often need your help. If you don't have written testimonials yet, we'll suggest a short email you can send to past customers asking for one. Getting them is faster when the request comes from you.

Awards, certifications, or press mentions

6. Google & social media

Google Business Profile URL (if you have one)

Google Business Profile requires you to claim/verify it. If you haven't claimed yours yet, Google mails a postcard to your business address with a code. We can tell you what to look for, but only the business owner can complete verification.

Facebook URL

Instagram handle

LinkedIn URL**TikTok / YouTube / other**

7. Contact info & hours (for your website)

Public phone number**Public email****Business hours (or “by appointment”)****Service area — cities, ZIP codes, or “nationwide / online only”**

8. Integrations that need a few steps from you

These features work great, but they require you to sign in with your account or complete a verification step we can't do on your behalf. Check any you'd like — we'll tell you what connection or verification we need, and you'll complete the steps on your side.

- ☐ **Online booking / calendar** — you'll connect your Google Calendar, Calendly, Acuity, or similar so appointments sync to your real calendar.
- ☐ **Google Business Profile** — you'll claim/verify with Google (postcard or phone). We'll then pull reviews and map data to your site.
- ☐ **Customer reviews widget** — you'll ask past customers for reviews (we'll give you a template email).
- ☐ **Email newsletter** — you'll create a free Mailchimp / ConvertKit / Beehiiv account. We'll wire the signup form to it.
- ☐ **Domain email (you@yourbusiness.com)** — you'll approve DNS changes and pay the monthly Google Workspace / similar fee.
- ☐ **Payment processing / online ordering** — you'll create a Stripe or Square account and verify your business identity.
- ☐ **Social media auto-feed** — you'll grant permission on Facebook/Instagram so we can display your latest posts.

9. Restaurants only (skip if not applicable)

- ☐ I want my menu on the website — I'll send it as PDF, photo, or text
- ☐ I want online ordering (pickup/delivery)
- ☐ I want online reservations

Which platform do you use (or want to use)? e.g., Toast, Square, OpenTable, Resy

10. Privacy policy & terms of service

We are not a law firm and we don't give legal advice. We can drop in a simple, generic privacy policy and terms-of-service page so your site isn't missing them at launch. **We strongly recommend having a lawyer review or replace these** before you rely on them — especially if your industry has specific rules (medical/HIPAA, financial, legal services, children's products, alcohol, cannabis, etc.). If your industry needs specific disclaimers, your lawyer should draft those too.

Please check one:

- ☐ Use your generic privacy policy + terms (I understand I should have a lawyer review them)
- ☐ I'll provide my own privacy policy and terms (from my lawyer)
- ☐ Skip for now — I'll add them before launch

Any industry-specific disclaimers or compliance notes we should know about?

11. Anything else

Deadlines, upcoming events, or launch date to plan around

Anything we didn't ask that you want us to know

Submitted by

Name

Date

Thanks! Email this back to **info@flextheweb.com** along with your logo, photos, and any reference files. We'll get to work on your free demo — you'll see it within about 5 business days.