



Name \_\_\_\_\_

Company Name \_\_\_\_\_

Website URL \_\_\_\_\_

Do you have a blog? List URL: \_\_\_\_\_

### **SOCIAL ACCOUNTS**

*If you don't have an account, and would like us to set one up for you, enter "please set up" Otherwise, please leave blank*

LinkedIn Email/Phone Number \_\_\_\_\_

LinkedIn Password \_\_\_\_\_

Facebook Email/Phone Number \_\_\_\_\_

Facebook Password \_\_\_\_\_

What would you like your Facebook page to be named? (leave blank if you want us to decide for you)

\_\_\_\_\_

Twitter Email/Phone Number \_\_\_\_\_

Twitter Password \_\_\_\_\_

Mobile Phone Number (needed for Twitter verification) \_\_\_\_\_

Google ID (may be your gmail address) (Pro Package & Above) \_\_\_\_\_

Google Password \_\_\_\_\_

Youtube ID (may be your gmail address) (Pro Package & Above) \_\_\_\_\_

Youtube Password \_\_\_\_\_



Instagram Email/Phone Number (Pro Package & Above) \_\_\_\_\_

Instagram Password \_\_\_\_\_

What Other Social Media Accounts do you have Set-up?

\_\_\_\_\_

### **ABOUT YOUR COMPANY**

Geographies you serve (list top 3 city, ST)

\_\_\_\_\_

If you're trying to gain new clients, where are your target locations? (Locally, Across the country, remotely, etc.)

\_\_\_\_\_

Services you offer

Bookkeeping/Controller/Write-up

Tax

QuickBooks Consulting

Other (Please List)

\_\_\_\_\_

What is your stance on political/religious/social issues?

No position when it comes to business accounts

Take the following positions for my business: (Examples: Proud Latina/Black-owned business; Christian values or support a specific church, We support the local food bank, etc.)

\_\_\_\_\_



**SOCIAL MEDIA GOALS**

What are your main goals?

Gain New Clients

Inform the clients you have

Be a resource to others in the industry

Other (Please explain)

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What's the main message you'd like to get across to your audience?

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Do you want us to follow your clients in Twitter? (Platinum Package Only)

Yes                  No

Do you want us to friend your clients in Facebook? (Platinum Package Only)

Yes                  No

Do you want us to connect with your clients in LinkedIn? (Platinum Package Only)

Yes                  No

*(We will also make lists in Twitter and Facebook for those who connect with you. It makes it easier to see their posts and retweet/like their posts.) (Platinum Package Only)*

Should we join/follow groups related to your city? City Councils, Chambers, Police, etc. (Platinum Package Only)

Yes                  No

What community groups would you like to follow/join? Please include memberships, company causes, local groups, etc. (Platinum Package Only)

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What percentage of posts would you like your services advertised? (We generally try to have an even mix of services, testimonials, personality posts, contact posts, location posts, blog and resources, and about (you and your company) posts)

About 50%

About 40%

About 30% (recommended)

About 20%

Other

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Are personality posts acceptable? Check the ones you want posted

Holiday posts

Motivational posts

Fun questions

Trivia about the industry

Anything we should NEVER do in your social accounts? Any type of message or specific verbiage you don't like? Please explain!

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**Please send us a list of clients. Please e-mail us your logo graphic with this form.**

Thank you! We'll be in touch!