

STRATEGY ONBOARDING FORM

“Your Brand Transformation Journey”

INTRODUCTION (FORM DESCRIPTION)

This isn't just onboarding.

This is a structured breakdown of your business, your goals, and the opportunities available for growth.

We use this to understand:

- Where your business is right now
- Where you want it to go
- What is helping or limiting your growth

Whether you already have branding or you're starting from scratch, this helps us build a clear direction for your brand.

SECTION 1: ABOUT YOU & YOUR BUSINESS

1. Full Name
2. Business Name
3. What does your business do?
4. What inspired you to start this business?

SECTION 2: VISION & GOALS

5. Where do you see your business in the next 6–12 months?
6. What would success look like for you personally and financially?
7. What is the biggest change you want this project to bring to your business?

SECTION 3: STRATEGIC ANALYSIS (SWOT)

This section helps us understand your strengths, weaknesses, opportunities, and threats so we can build a proper growth direction.

STRENGTHS

What are you currently doing well in your business?

WEAKNESSES

What is currently limiting your growth or slowing you down?

OPPORTUNITIES

What opportunities do you see in your market or industry that you are not fully taking advantage of yet?

THREATS

What external factors are affecting your business?
(e.g. competition, market changes, customer behavior, pricing pressure)

SECTION 4: CURRENT REALITY

8. What feels unclear or frustrating in your business right now?
9. What have you tried so far to fix or improve it?

SECTION 5: BRAND STATUS

10. Do you currently have branding assets?
 - Full brand identity

- Logo only
 - Some designs/content
 - Starting from scratch
11. If you have assets, upload them here
12. If you are starting from scratch, describe the feeling you want your brand to give people
(e.g. luxury, bold, premium, simple, modern, trustworthy, friendly)

SECTION 6: PRIORITY & FOCUS

13. What is your main priority right now?
- Increase sales
 - Improve branding
 - Get more visibility
 - Reposition your brand
 - Fix inconsistency
 - Other
14. How urgent is this project for you?
- I want to start immediately
 - Within a few weeks
 - I'm still exploring options

SECTION 7: FINAL REFLECTION

15. If this project succeeds, what would it change for you personally or professionally?

16. Is there anything else we should understand about your vision or business?

 CONFIRMATION MESSAGE (IMPORTANT)

Thank you for completing this.

We're now reviewing your responses to understand your business and map out the best direction for your brand transformation.

This is the first step toward building something structured, intentional, and aligned with your goals.