Lantern & Co. Marketing

hello@lanternco.example | (614) 555-0149

CLIENT INTAKE FORM

Date received: Nov 6, 2026
Client #: LC-0193

Thank you for your interest. This form helps us understand your needs before our first meeting. It takes about 10 minutes.

1. Contact information

Full name	Marcus Hale	**Title / role**	Owner
Email	marcus@halebrewing.example	**Phone**	(614) 555-0108
Preferred contact	Email, weekday mornings	**Best time to call**	9-11 AM

2. About your business

Business name	Hale Street Brewing Co.	**Website**	halebrewing.example
Industry	Craft brewery & taproom	**Years in business**	4
Employees	18	**Location(s)**	Columbus, OH (1 taproom)

Describe your business, customers and what makes you different:
Neighborhood brewery with a family-friendly taproom and food trucks. Customers are mostly locals 25-45; known for small-batch sours and trivia nights.

3. What do you need help with?

- ☒ Social media management
- ☒ Email marketing
- ☒ Event promotion
- ☐ Photography / video
- ☐ Website design / updates
- ☐ Branding / logo
- ☐ Paid advertising
- ☐ Other: _____

4. Goals & timeline

What would make this project a success in 6-12 months?

Fill weeknight taproom events (trivia, release nights) and grow the email list from 1,200 to 4,000.

Desired start	January 2027	**Hard deadlines**	Spring release party, Mar 20

5. Budget

- ☐ Under $1,000 / month
- ☒ $1,000 - $2,500 / month
- ☐ $2,500 - $5,000 / month
- ☐ Over $5,000 / month
- ☐ One-time project
- ☐ Not sure yet

SAMPLE

Preview only - the download contains the editable, unwatermarked files.