NEW CLIENT

MAIN EVENT
& FRIENDS

PODCAST CLIENT INTAKE

Your answers become a custom game plan that takes your show from zero to a growing, profitable podcast.

WHAT WE'LL COVER

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CLIENT NAME

DATE RECEIVED

START HERE Write your answer on the line under each question and check any boxes that apply. "Not sure yet" is a fine answer, we'll work it out together on your kickoff call. Attach any logos, photos, music or reference links when you send it back.

01 CLIENT INFORMATION

Who we are working with and how to reach you.

FULL NAME

COMPANY / ORGANIZATION

EMAIL

PHONE

WEBSITE

SOCIAL MEDIA HANDLES

BEST WAY AND TIME TO REACH YOU

PODCAST NAME (WORKING TITLE IS FINE)

TARGET LAUNCH DATE

★ **Where are you today?**

☐ Just an idea ☐ Planning ☐ Already recording ☐ Launched, want to grow

02 VISION & GOALS

Why the show exists and what winning looks like for you.

01 **In one or two sentences, what is your podcast about?**

02 **Why are you starting this show, and why now?**

03 **What is the #1 thing you want this podcast to do for you or your business?**

☐ Build authority ☐ Generate leads / sales ☐ Grow a brand ☐ Build community ☐ Earn sponsor income ☐ Tell a story

04 **Where do you want the show to be in 12 months? In 3 years?**

05 **What would make you say this podcast was a success?**

06 **What scares you most about starting (or growing) a podcast?**

03 BRANDING

The show's name, look, sound and personality.

01 **Do you have a show name? If not, list a few ideas.**

02 **Pick three to five words that describe the show's personality (e.g., bold, warm, funny, polished, raw).**

03 **What makes your show different from others on the same topic?**

04 **Is the podcast tied to an existing personal or business brand? How closely should it match?**

05 **Do you already have a logo, colors or fonts? (Please attach them.)**

☐ Yes ☐ No ☐ Need them created

06 **Name two or three podcasts or brands whose look or feel you admire, and what you like about them.**

07 **Is there anything you do NOT want the brand to look or feel like?**

08 **Do you have a tagline or slogan in mind?**

09 **What style of cover art appeals to you?**

☐ Host photo ☐ Illustration ☐ Bold type ☐ Minimal

10 **Do you want custom intro/outro music or a sound logo? Describe the vibe.**

11 **Have you secured the show name on social media, a website domain and email?**

☐ Yes ☐ Some ☐ No

04 SHOW FORMAT & CONTENT

How each episode is built and how often it comes out.

01 **What style of show is it?**

☐ Solo ☐ Cohosted ☐ Interview ☐ Panel ☐ Storytelling ☐ Mix

02 **How long should each episode be?**

☐ Under 20 min ☐ 20 to 40 min ☐ 40 to 60 min ☐ 60+ min

03 **How often will episodes release?**

☐ Weekly ☐ Every 2 weeks ☐ Monthly ☐ In seasons

04 **Will the show be on video, audio only, or both?**

☐ Video + audio ☐ Audio only

05 **What tone fits the conversation (casual, professional, comedic, educational, inspirational)?**

06 **Do you want recurring segments (listener questions, hot takes, rapid fire)? Describe them.**

07 **List five to ten episode topic ideas you already have.**

08 **Are any topics, language or content off limits? Should episodes be marked explicit?**

09 **How many episodes do you want recorded before launch?**

☐ 3 ☐ 5 ☐ 8+ ☐ Not sure

10 **Who will plan topics, outlines and scripts?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

05 HOSTS & GUESTS

Who is on the mic and who you want to bring on.

01 **Who are the hosts? Give names and a short bio for each.**

02 **How comfortable are the hosts on camera and on the mic?**

☐ Very ☐ Somewhat ☐ New to it

03 **Would the hosts like on camera or interview coaching?**

☐ Yes ☐ No ☐ Maybe

04 **Will you have guests? Who are your dream guests?**

05 **Who can you book right now from your own network?**

06 **Who will find, book and prep guests?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

06 TARGET AUDIENCE

Who we are making the show for, so every choice speaks to them.

01 **Describe your ideal listener in a few sentences. Who are they?**

02 **What age range are they, and where do they live?**

03 **What is their profession, industry or life stage?**

04 **What problems, goals or interests do they have that your show speaks to?**

05 **Why would they choose your show over others? What do they get from you?**

06 **When and where do they listen or watch (commute, gym, work, home)?**

07 **Which platforms do they use most?**

☐ YouTube ☐ Spotify ☐ Apple ☐ Instagram ☐ TikTok ☐ LinkedIn

08 **Do you already have an audience (email list, followers, customers)? Roughly how big?**

09 **What do you want listeners to DO after an episode (subscribe, buy, book, join, share)?**

07 PRODUCTION & RECORDING

Studio time, equipment and scheduling.

01 **Where will you record?**

☐ Our studio ☐ Remote ☐ On location ☐ Mix

02 **How many people will be on set at a typical recording?**

03 **How many episodes do you want to record per session?**

☐ 1 ☐ 2 ☐ 3 or 4 (batch)

04 **Which days and times are you generally available to record?**

05 **Do you need a specific set look (couch, desk, branded backdrop, lighting mood)?**

06 **Do you need hair, makeup or wardrobe help on recording days?**

☐ Yes ☐ No

07 **Do you need a producer in the room to run the show and keep time?**

☐ Yes ☐ No

08 EDITING, PUBLISHING & DISTRIBUTION

What happens after we hit stop.

01 **What level of editing do you want?**

☐ Light cleanup ☐ Full edit ☐ Story driven edit

02 **Who will upload and publish episodes to podcast platforms and YouTube?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

03 **Where should the show be published?**

☐ YouTube ☐ Spotify ☐ Apple ☐ Amazon ☐ Website ☐ Other

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04 **Do you already have a podcast hosting account (Buzzsprout, Spotify for Creators, etc.)?**

☐ Yes ☐ No

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05 **Who will write titles, descriptions and show notes?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

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06 **Do you want transcripts and chapter markers for each episode?**

☐ Yes ☐ No

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07 **How fast do you need each episode turned around after recording?**

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08 **Who gives final approval before an episode goes live?**

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09 LAUNCH PLAN

How we open the doors and make noise on day one.

01 **Do you have a target launch date or event to launch around?**

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02 **Do you want a trailer episode before launch?**

☐ Yes ☐ No

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03 **How many episodes should drop on launch day?**

☐ 1 ☐ 3 ☐ 5

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04 **Would you like a launch event or live watch party at the studio?**

☐ Yes ☐ No ☐ Maybe

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05 **Who in your network (partners, guests, influencers) can help share the launch?**

06 **Do you want press outreach (local news, blogs, other podcasts)?**

☐ Yes ☐ No

10 MARKETING & SOCIAL MEDIA

Who does what to grow the show every week.

01 **Are WE handling posting and marketing, or are YOU doing it?**

☐ We handle it all ☐ You handle it all ☐ Shared ☐ Not sure yet

02 **If shared, which tasks do you want us to own? (posting, clips, captions, graphics, ads, replying to comments)**

03 **Who will post on social media each week?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

04 **Who will create short clips, reels and graphics from each episode?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

05 **Who will reply to comments and messages?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

06 **Which social accounts will the show post on? Are they new or existing?**

07 **How many clips or posts per episode do you want?**

☐ 3 ☐ 5 ☐ 10+

08 **Do you have a monthly budget for paid ads? Approximate range?**

09 **Do you have an email list or newsletter to promote episodes?**

☐ Yes ☐ No

10 **Will guests be asked to share their episodes with their audiences?**

☐ Yes ☐ No

11 **Are you open to cross promotion and guesting on other podcasts?**

☐ Yes ☐ No

12 **Do you want a podcast website or landing page?**

☐ Yes ☐ No ☐ Have one

13 **What has or hasn't worked for you in past marketing?**

11 MONETIZATION & SPONSORSHIPS

How the show pays for itself and then some.

01 **How do you plan to make money from the show?**

☐ Sponsors / ads ☐ Your products or services ☐ Merch ☐ Memberships ☐ Live events

☐ Not a priority

02 **Do you already have sponsors or brands you'd like to approach? List them.**

03 **Who will find and manage sponsors?**

☐ Our team ☐ Your team ☐ Shared ☐ Not sure yet

04 **Do you want a media kit or sponsor deck created?**

☐ Yes ☐ No

05 **What revenue would you like the show to bring in during year one?**

12 BUDGET, TIMELINE & SUCCESS

The resources behind the plan and how we will measure it.

01 **What is your monthly budget for production and marketing?**

☐ Under $1,000 ☐ $1,000 to $2,500 ☐ $2,500 to $5,000 ☐ $5,000+

02 **How many hours a week can you personally give to the show?**

03 **Who on your team is the main point of contact and decision maker?**

04 **Which numbers matter most to you?**

☐ Downloads ☐ Views ☐ Subscribers ☐ Leads ☐ Revenue

05 **What is your goal for those numbers at 3, 6 and 12 months?**

06 **How often would you like progress reports and strategy check ins?**

☐ Weekly ☐ Monthly ☐ Quarterly

13 LEGAL & RIGHTS

Protecting the show and everyone on it.

01 **Is the show owned by you personally, or by a company? Which one?**

02 **Have you trademarked or checked the show name?**

☐ Yes ☐ No ☐ Need help

03 **Do you need guest release forms and cohost agreements?**

☐ Yes ☐ No ☐ Have them

04 **Will you use any music, clips or images you don't own?**

☐ Yes ☐ No ☐ Not sure

05 **Any sponsors, employers or contracts that limit what you can say or promote?**

14 ANYTHING ELSE

Last thoughts before we build your plan.

01 **Is there anything else we should know about you, your brand or your show?**

02 **What questions do you have for us?**

03 **How did you hear about us?**

NEXT UP We review your answers, then meet for a kickoff call to walk you through your custom podcast plan: brand, production schedule, launch and growth strategy.

CLIENT SIGNATURE **DATE**