



Client Intake Form

Brand & Business Background	Brand Name: Brand Mission & Values: Brand Tone/Voice: Main Competitors: Differentiators:
Target Audience	Ideal Customer (age, gender, lifestyle): Problems your product solves: Buying motivation: Customer platforms (TikTok, IG, etc.):
Product Details	Product Name & Type: Key Features & Benefits: Unique Selling Points: Variations: Packaging Details: Guarantees/Special Offers:
Content Goals	Main Goal (sales, awareness, education): Preferred Format: Single or ongoing series?: Hashtags/Slogans to include:
Style & Messaging	Tone (funny, educational, etc.): Preferred Style: Examples of content you like: Topics to avoid:
Logistics & Resources	Product provided?: Brand guidelines available?: Pre-written copy?: Budget: Deadline:
Approval & Feedback	Main contact for feedback: Rounds of revisions: Raw files or edited?: How success will be measured:



Client Intake Form – Fillable

Brand & Business Background	
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Approval & Feedback	



Creator Requirements

Campaign Goal	Awareness, UGC ads, product demo, conversions. Action desired: click, purchase, follow brand.
Deliverables	Video quantity, lengths, formats, styles. Optional: photos, stills.
Key Points to Cover	Required features, benefits, problem solved, CTA. Avoid unverified health claims & competitor mentions.
Visual Requirements	Bright lighting, clean space, minimal background. Product in first 3 seconds. No heavy filters.
Examples + Mood Board	Brand provides reference links and mood boards. Recreate vibe, not a copy.
Do Not Use List	Explicit music, profanity (unless approved), controversial topics, minors, medical claims.
Review & Revisions	Draft via Drive/Dropbox. Brand review 24–72 hrs. Limited revision rounds.
Usage Rights	Where content can be used and duration. Posting rules: platform, captions, tagging.
Product Delivery	Brand ships product with tracking. Creator confirms receipt before filming.
Payment	Rate, payment method, schedule. Invoice instructions.
Contact	Brand contact name, email, preferred method.

The Savvy Agency • Creator Requirements



Creator Requirements – Fillable Form

Campaign Goal	
Deliverables	
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