YouTube Client Onboarding Questionnaire

Ten sections for the client, plus a kickoff doc that maps every answer to a research step.

Template by OutlierKit (outlierkit.com/resources). Delete this line and add your agency logo.

Part A. Client questionnaire

1. The business behind the channel

What do you sell, and roughly what does it cost?

What happens after someone watches a video and likes you? (book a call, buy a course, join a list)

How many new customers a month would make this channel worth it to you?

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2. Who buys from you

Describe your three best customers: their job, their age range, and the problem they had when they found you.

What words did they use to describe that problem? Quote them if you can.

Who do you NOT want to attract?

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3. Channels you envy

Name three YouTube channels you envy.

For each one: what exactly do you envy? (their views, their format, their clients, their style)

Is there a channel your best customers already watch?

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4. Channels you refuse to look like

Name one or two channels in your space you never want to be compared to, and why.

Any topics, formats or claims that are off limits?

5. What you know that others don't

List the 10 questions your clients ask you most often.

What do you believe that most people in your industry would disagree with?

Tell us one client story you can share (with permission, names removed).

6. Your channel today

Channel URL, and the three videos you're proudest of.

Which video surprised you, good or bad?

What have you already tried that didn't work?

7. What success looks like

Six months from now, what would make you say this was worth it?

Pick ONE number we report on first: views per video, subscribers, booked calls, or email signups.

8. Time, approvals and compliance

How many hours a month can you give to filming?

Who approves scripts and titles, and how fast?

Is there a compliance or legal review? (common for finance, health and law)

9. Brands and partners

Any brands you'd happily work with, or would never promote?

Do you have partners, affiliates or your own products to feature?

10. Access and logistics

Add us as Manager on YouTube Studio (Settings, Permissions).

Share brand assets: logo, fonts, colours, headshots.

Main contact, backup contact, and preferred channel (email, Slack, WhatsApp).

Part B. Kickoff doc (agency only)

Section	Feeds	Tool
1. The business behind the channel	Conversion goal and monetization map	Competitor Studio: Funnels and Monetization module
2. Who buys from you	Audience psychographics	Competitor Studio: Audience Psychographics + Comment Intelligence
3. Channels you envy	Competitor discovery seed and niche map	Competitor Studio (enter the closest channel) + Similar Channels for size peers
4. Channels you refuse to look like	Positioning guardrails	Video Analysis on the named videos
5. What you know that others don't	Topic bank and angle shortlist	Keyword Research (demand check) + Outlier Finder (format proof)
6. Your channel today	Baseline audit	Channel Analysis
7. What success looks like	Report scorecard	Channel Analysis (monthly) + the monthly client report template
8. Time, approvals and compliance	Production cadence	None. This sets the calendar.
9. Brands and partners	Sponsor fit	Competitor Studio: Sponsor Intelligence
10. Access and logistics	Access checklist	None

60-minute kickoff agenda

Time	Topic	How to run it
0 to 10 min	Goals and the one number	Agree the primary metric from section 7. Write it down in front of them.
10 to 25 min	Who buys	Walk through section 2. Ask for the exact words customers use.
25 to 35 min	Channels you envy	Open one envy channel on screen. Ask what they would copy and what they would never do.
35 to 45 min	Time, approvals, compliance	Confirm filming hours, approver and review time.
45 to 55 min	What happens next	Explain research week. Book the week-two strategy meeting before you hang up.
55 to 60 min	Access check	Confirm Studio access and asset handover live on the call.

Week-two strategy meeting: what you bring

[ ] Niche map: who the client competes with, by size, and which channels are growing fastest.

[ ] Baseline: the client's views per video next to the median of channels their size.

[ ] Three proven angles from outlier videos in the niche, each with the source video and its multiple.

[ ] First six video ideas, each with a demand number and the outlier it borrows from.

[ ] The one number we report on, and the date of the first monthly report.