Client access and password procedure

SOP TEMPLATE

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

To keep client accounts secure, with access only for the people who need it, for as long as they need it.

Scope

Every client website, hosting, domain, analytics, ad and social account the agency can reach.

Responsibilities

Role	Responsibility
Account manager	Requests access from the client and removes it when the contract ends.
Team members	Use only their own logins and the password manager.
Operations lead	Manages the password manager and runs the quarterly access review.

Procedure

1. **Ask for user access, not passwords**

   Ask the client to invite each person as a user with the right role, so they keep ownership.

2. **Store shared logins in the manager**

   Where a shared login can't be avoided, store it in the agency password manager, in the client's vault.

   > **Caution:** Never send passwords by email or chat, or keep them in a document.

3. **Turn on multi-factor login**

   Use multi-factor login on every account that supports it.

4. **Give the least access needed**

   Give each person the lowest role their work needs, and admin access only to those who must have it.

5. **Remove access when people leave**

   On a staff member's last day, remove their access to every client account and the password manager.

6. **Hand back access when a contract ends**

   Transfer ownership, remove the agency's users and record the handover with the client.

Records

- The access list for each client.
- The quarterly access review.

Related documents

- Client onboarding checklist

Revision history

Version	Date	What changed	Approved by