

Agency client onboarding checklist

ONBOARDING CHECKLIST TEMPLATE

Employee _____ Role _____ Start date _____
 Buddy or manager _____

Client onboarding From the signed proposal to the first piece of work

TASK	DUE	DATE	INITIALS
Contract and admin			
☐ Get the contract or statement of work signed, with scope, fees and notice period	Before kickoff		
☐ Set up billing, the first invoice and the client's accounts contact	Before kickoff		
☐ Create the client in your project, time and reporting tools	Before kickoff		
Access and assets			
☐ Ask the client to add the agency to their ad, analytics, website and social accounts with user access Ask for access through each platform's user or partner settings, never a shared password.	Before kickoff		
☐ Collect brand guidelines, logos, fonts, images and past campaign results	Before kickoff		
☐ Record what access was granted and who at the client approved it	Before kickoff		
Discovery			
☐ Hold a discovery call on the business, customers, competitors and what has and hasn't worked	Week 1		
☐ Audit the current accounts, site or campaigns, and note quick wins and risks	Week 1		
Goals and reporting			
☐ Agree goals and KPIs, and how and when they'll be measured	Week 1		
☐ Agree the reporting format, schedule and who receives it	Week 1		
☐ Agree who approves work at the client, and how fast they'll reply	Week 1		
Kickoff			
☐ Introduce the client to their team, and the main contact on each side	Week 2		
☐ Share the first 90-day plan and the first deliverables with dates	Week 2		
☐ Write the client's preferences and approvals into their account playbook	Week 2		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____