Client Onboarding Checklist

Business & Contact Information

[ ] Company name, address, phone number

[ ] Primary point of contact (name, email, phone)

[ ] Billing contact (if different)

[ ] Payment method or invoicing setup

[ ] Preferred communication method & frequency

Business Overview

[ ] Company background & mission

[ ] Target audience/customer personas

[ ] Key competitors

[ ] Existing marketing channels and performance

[ ] Unique selling propositions

Brand Assets

[ ] Brand guidelines (logo, fonts, colors, tone of voice)

[ ] High-res logo files (SVG, PNG, JPG)

[ ] Approved images/videos for use

[ ] Social media handles & hashtags

[ ] Ad templates and/or other creative assets

Access & Credentials

[ ] Google Analytics / GA4 access

[ ] Google Tag Manager access

[ ] Google Search Console access

[ ] Facebook Business Manager access

[ ] Ad accounts (Google Ads, Meta Ads, LinkedIn Ads, etc.)

[ ] Social media accounts (Instagram, TikTok, Twitter/X, etc.)

[ ] Email marketing platform (Klaviyo, Mailchimp, etc.)

[ ] CRM or customer database (if relevant)

[ ] Website CMS access (WordPress, Shopify, etc.)

[ ] FTP, hosting, or domain registrar (if needed for web work)

Marketing Goals & KPIs

[ ] Short- and long-term marketing goals

[ ] Primary KPIs (traffic, leads, ROAS, etc.)

[ ] Monthly/quarterly budget

[ ] Any seasonal campaigns or product launches coming up

Previous Marketing Work

[ ] Past campaign performance reports

[ ] Previous agencies or freelancers used (and what they did)

[ ] What worked / what didn't

[ ] Existing customer journey or funnel maps

Legal & Administrative

[ ] Signed contract or agreement

[ ] NDAs (if applicable)

Content & Product Info

[ ] Product/service list with descriptions

[ ] Pricing sheets or catalogs

[ ] Testimonials or reviews

[ ] Blog content or resources

[ ] FAQs or common objections

[ ] Lead magnets, gated content, or offers