

Onboarding Checklist For Digital Marketing Clients

Whether you are an agency, small business, or freelancer, use this free digital marketing client onboarding checklist to ensure a professional and easy process for your new clients.



CLIENT INTRODUCTION:

- ☐ Send out introduction email and include client questionnaire
- ☐ Collect basic client contact information
- ☐ Send out client proposal, contract, and invoice for first payment
- ☐ Create a new client folder (paper/digital)
- ☐ Receive signed contract and record first payment

INTRODUCTION MEETING:

- ☐ Send out welcome email and set up first (discovery) meeting
- ☐ Send out first meeting agenda
- ☐ Request additional details from client (blog and social media details, usernames and passwords)
- ☐ Take notes during discovery meeting with client

MARKETING PLAN AND AGENDA

- ☐ Marketing and campaign research for new client
- ☐ Create marketing and campaign plan
- ☐ Review with client and have client sign off on marketing plan

- ☐ Create marketing timeline and have client sign off on timeline
- ☐ Assign tasks to team (if you have one) and schedule a kickoff meeting with team
- ☐ Set up additional meetings with client (monthly)
- ☐ Invoice any additional payments with due dates or set up reoccurring monthly payment
- ☐ Record project start date and begin project

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