

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