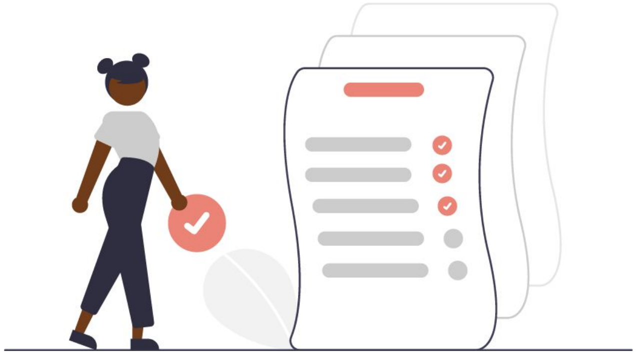

The checklist for onboarding new agency clients

Start communication off on the right foot & build a real relationship with your agency client.

February 2022

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Intro

We all love getting new work, but onboarding new clients isn't a seamless task. This checklist will show you Data Driven Marketers' approach to onboarding and go over methods we follow to make the experience positive for all.

Read the guide and learn:

- What to do when you sign a new client
- What to do before a kickoff meeting (including what to send to your client)
- What materials are essential to provide your clients with
- And more!

Need advice? Use our templates for meeting agendas, welcome emails, onboarding presentations, and more. Learn more →

Part 1

You signed a new client.

Congrats! 🎉 🤘

Start the relationship off on the right foot by making your new client feel welcomed. Engaging with your clients in a positive manner and providing them with tangible items will help make the transition from sales to starting business a seamless process. Additionally, announcing the new account and sharing all available details with your team will set them up for success and support a culture of transparency.

For your agency

- ❑ Take a moment to celebrate!
- ❑ Share client details with your team during a stand-up or another company-wide meeting.
- ❑ Document client details, including communication preferences, in an accessible place for your team.
- ❑ Review →Data Driven Marketers' onboarding methodology for communication tips and solutions.

Part 2

Before the kickoff meeting.

Digital marketing, historically, isn't tangible.

To help your clients feel involved and help them understand your process from the beginning, create timeline documents or calendars that illustrate next steps, their role in the project, and when they can expect to see your work.

For your agency

- ❑ Build the client's project(s) in your agency's project management system.
- ❑ Import onboarding steps into your project management system.
- ❑ Create a timeline document that illustrates *when* your team will be completing deliverables.
- ❑ Coordinate a short meeting with your team to collect any final questions for the client and lay out final to-dos before starting.

For the new client

- ❑ Send the timeline document that illustrates *when* your team will be completing deliverables.
- ❑ Conduct a short meeting (or record a video) of you talking through the timeline to help your client.
- ❑ Send a welcome email that discuss what the client can expect next and who they should contact if they have any questions (i.e., their account manager), and share general information about your agency.

Part 3

Conduct the kickoff meeting.

After you've set expectations for your client, you'll be able to coordinate and conduct the kickoff meeting.

At the start of the meeting, introduce all the key players on your team, go through the meeting schedule, and have the client introduce their company. Review goals and client documents, and close the meeting with a list of items needed from your client to move forward. Adjust timelines, if necessary. Finally, end the meeting with a recap of everything you've discussed.

For the new client

- ❏ 24 hours before the meeting, send an agenda that outlines what the client can expect throughout the call/in-person meeting.
- ❏ At the start of the meeting, introduce yourself and the team, explain their roles in the project, and walk through the agenda.
- ❏ Next, introduce the client and ask for them to share their story/the company's pitch with the team.
- ❏ Confirm that the client's goals are the same since you started the project.

For the new client, cont.

- ❑ Review or develop your client’s brand voice guide.
- ❑ Review or develop your client’s SWOT analysis.
- ❑ Review your client’s “homework” for today/after the meeting, referencing your timeline, if needed. Explain that the project timeline will be pushed back if the team is waiting on their homework.
- ❑ End the meeting with a recap of what you’ve discussed and a friendly discussion.

Meeting follow-up.

Part 4

Send an email after the kickoff meeting with a detailed overview of everything you've discussed to make it easier on everyone.

If your client isn't responsive or doesn't send you the materials you need to start the project, it's best to follow up with them until they do. If needed, once your team has what they need from the client, reconvene and review those materials together. Remember to update all key dates in your agency's project management system to reflect the project timeline.

For your agency

- ❏ After the meeting, meet with the team to hear their thoughts, feedback, recommendations for the project, and/or new dates based on the discussion.
- ❏ Share the client’s homework as it's completed.
- ❏ If the client sent the homework past your official start date, update all dates in your agency’s project management system.

For the new client

- ❏ Send a thank you email to the client with a detailed recap of what you discussed. In the same email, also share the client’s homework items.
- ❏ Send friendly follow-ups until the homework is completed. We suggest following up two days after the meeting. If you receive no response, follow up exactly seven days after the meeting.

For the new client, cont.

- ❑ If the client sent the homework past your official start date, share the updated timeline with them.
- ❑ To impress your client, after all materials have been shared, send a thank you email/video with details on *how* you'll use these assets.

Starting the project.

Part 5

Now that you have everything you need from the client, your agency can officially kickstart the project and schedule your bi-weekly or monthly strategy meetings. Regular meetings will help your team communicate progress on the project. During these calls or in-person events, make sure to highlight any wins or challenges while also discussing any further needs or concerns the client has.

For your agency

- ❏ Notify the team when all homework is complete.
- ❏ Kickstart the project! Update your project management system as tasks are complete.

For the new client

- ❑ Schedule recurring meetings with your client.
- ❑ Conduct bi-weekly or monthly meetings with your client to review progress on the project, review key wins and challenges, and discuss other needs

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Thank you!

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