SEO CLIENT ONBOARDING CHECKLIST

(Your Business Name) Client Onboarding Checklist

This checklist is designed to help **(Your Agency Name)** onboard **(Client's Business Name).**

Follow these steps to onboard your clients successfully:

1. **Welcome Clients**

(Send a welcome email that introduces your team, briefly explain what the client will do next, and tell them to ask any initial questions they may have, e.g., through an intake info form. You can add to or tweak this to reflect your agency's needs/contexts.)

For example:

- Send a welcome email introducing key team members (e.g., SEO Account Manager, Technical SEO Specialist, Content Strategist).
- Provide an overview of the initial steps: completing the client questionnaire, scheduling the kickoff call, and preparing access credentials.
- CTA: Invite them to ask questions or reach out with any immediate needs.

  Your welcome email could read like this:

  Hi (Client's Name),

  Welcome to (Your Agency)! We're thrilled to partner with you on your SEO journey. Our team is ready to contribute to your SEO efforts through content that meets EEAT guidelines and impacts bottom-line revenue.

  Here are some of the people on your dedicated team:

  - (Name), SEO Account Manager

- (Name), Technical SEO Specialist

- (Name), Content Strategist

They are CC'd in this email. Please contact any of them with questions about your deliverables or performances.

Next Steps:

1. Complete our SEO questionnaire (Link)

2. Schedule your kickoff call (Link)

3. Prepare to send website access credentials

4. Afterwards, we'll share the results of our preliminary SEO audit with you (as discussed).

For immediate assistance, send an email or call (SEO Account Manager's Name) at (email/phone).

Best regards,

(Your Name)

(Your Agency Name)

2. Preparation of Legal Documents

(Finalize all legal documents to protect you and your client and ensure both parties are on the same page.)

- Send necessary legal documents (the SEO retainer agreement or service contract) so they can review and sign.
- Clarify payment terms (e.g., Net 15, Net 30) and specify any key legal details or timelines.

3. Payment Setup

(Confirm how and when the client will pay for services. Clarify the payment terms (for example, upfront, recurring, or milestone-based payments) and ensure the client's billing information is correct.)

For example, you can:

- Agree on payment terms and confirm if their alternative proposition works for you. For example, 50% upfront, 50% upon completion, or any other structure that works.
- Document the client's billing information for future invoicing.

Pro Tip: Offer multiple payment methods to increase convenience.

4. Client Questionnaire

(Create a customized questionnaire to gather details on the client's business, objectives, and preferences. Edit the questions to suit the services you provide for the client.)

- Customize the questionnaire to gather critical client information on their:
  - Business goals, target audience, and key metrics.
  - SEO objectives, previous SEO efforts, and any known website issues.
  - Communication preferences and timelines.

Questions can be:

- *What are your business goals for this project?*
- *Who is your target audience?*
- *Who are your existing customers?*
- *What is your current SEO strategy?*
- *Do you have existing brand guidelines we should be aware of?*
- *What are your short and long-term business goals?*

- *What is your deadline for this project?*

You can use our client questionnaire here as pointers.

- Send the questionnaire link and ensure responses are reviewed prior to the kickoff meeting.

5. Data and Access Collection

(This is where you request login details for the websites and platforms you need access to.)

- Collect login credentials for essential platforms (e.g., CMS, Google Analytics, Google Search Console).
- Verify each access by logging in and checking permissions to ensure smooth workflow from the start.

6. Technical Audits and Strategy Planning

(Conduct preliminary research and analysis of existing data to know where you need to optimize to improve results.)

- Complete a preliminary SEO audit to identify technical SEO issues and verify key analytics setups.
- Plan initial strategies based on client objectives, including content calendars, KPIs, and reporting schedules.

7. Project Kick-Off

(Formally launch the project. Conduct a kick-off meeting or send a detailed project plan outlining the milestones and deliverables. This is where you revisit deliverables, confirm the client's internal process, talk about the values you'll be offering over again.)

- Conduct a kickoff meeting or share a detailed project roadmap.
- Give the clients a roadmap with all the project's phases and deadlines:

  For example:

- ***Phase 1:*** *Finalize requirements and access. Due by (Date).*
- ***Phase 2:*** *Initial content and technical optimization. Due by (Date).*
- ***Phase 3:*** *Adjustments based on client feedback. Due by (Date).*
- ***Phase 4:*** *Completion and project handover. Due by (Date).*
- ***Phase 5:*** *Review performance, preferably after three months of starting the project. Due by (Date).*

8. Mode of Communication

(Establish clear communication protocols to avoid confusion during the project.)

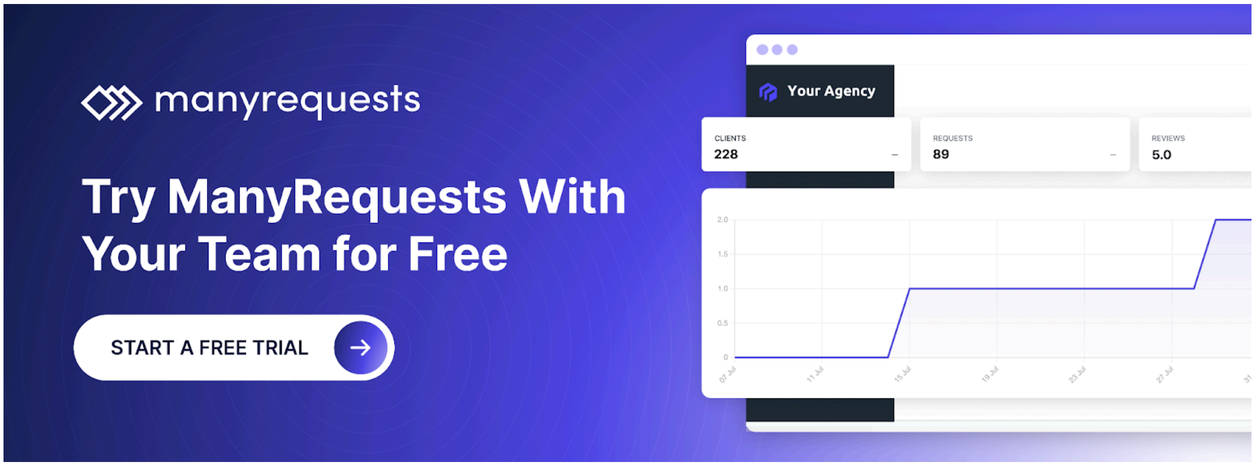
Here's how:

- Agree on the best communication platforms and ensure all stakeholders have access.
- Decide how often you will have check-ins— weekly, bi-weekly, *etc…*)
- Agree on a specific time that's mutually convenient, if necessary.
- Add the client to your team messaging platform.
- Document the communication protocols and share them with both teams.

9. Regular Check-ins and Updates

(Set regular check-in points with the client, either through meetings or reports, to keep them aligned throughout the project.)

- Set up regular check-ins, which can be weekly, bi-weekly, or monthly.
- Provide progress reports at every meeting.
- Get feedback from your client.



More Useful Resources

- [Free marketing agency proposal template]
- [The Best Client Facing Project Management]
- [How to Improve Your Project Intake Process]
- [What To DO When Client Doesn’t Pay]