

Digital Marketing Agency Onboarding Checklist



1

Conduct a strategic **kickoff meeting** to align on goals, timelines, and expectations.

2

Designate **an account manager** with appropriate authority and knowledge of the client's niche.

3

Provide detailed onboarding **documents** including team bios, project timelines, and communication protocols.

4

Facilitate **introductions** between the client and key team members, setting the stage for regular updates and communications.

5

Grant the **client access** to essential tools and provide training for project management and collaboration.

6

Implement **feedback mechanisms** to continuously improve the onboarding process based on client insights.

7

Maintain a regular schedule of **updates and check-ins** to discuss progress, adapt strategies, and ensure client satisfaction.