VENDASTA

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# Checklist for onboarding agency clients

- [ ] **Step 1: Sign on your new client**
  Salesperson creates formal proposal, gets client set up for billing, and initiates a friendly, positive day-one communication to welcome the client.

- [ ] **Step 2: Define onboarding tasks and dynamic due dates**
  Create a list of onboarding tasks with dynamic due dates that can be recycled for every new client. Ensure each task is assigned to someone.

- [ ] **Step 3: Set up a welcome email series**
  An automated email series can convey key information and help clients feel they've made the right choice.

- [ ] **Step 4: Sales handoff and introductions**
  Ensure sales formally hands off the client to the person who will be taking over the onboarding; this role will be defined in your onboarding task list.

- [ ] **Step 5: Send an onboarding questionnaire**
  This is an effective way to gather information about your client's goals, personality, and working style.

- [ ] **Step 6: Get clients familiar with your agency's online portal**
  This is where the bulk of their interactions with your agency will take place, so make sure they understand how to use it.

- [ ] **Step 7: Gather assets**
  Collect everything you need to get started on your client's project.

- [ ] **Step 8: Hold a level-setting meeting**
  This is where you can ensure client and agency are aligned in their goals and vision.

- [ ] **Step 9: Establish regular check-ins**
  Regular check-ins help you stay ahead of any client concerns.

## Tips for successful client onboarding

1. Take the time to create a repeatable process
2. Assign clear tasks to everyone involved internally
3. Centrally document client communications and onboarding progress
4. Make clients feel appreciated and welcome
5. Share essential educational resources early in the process, but don't overwhelm
6. Have a conversation; don't just talk at your client
7. Repeat the most important information frequently
8. Remember: Onboarding is a marathon, not a sprint