

CLIENT ONBOARDING WELCOME PACKET & DISCOVERY INTAKE

AGENCY ENGAGEMENT KICKOFF, BRAND POSITIONING, TECHNICAL ACCESS & COMMUNICATION PROTOCOLS

CLIENT COMPANY: _____ PRIMARY CONTACT: _____ TITLE: _____
EMAIL: _____ PHONE / MOBILE: _____ WEBSITE: _____
ASSIGNED ACCT MGR: _____ KICKOFF DATE: ____/____/20____ TARGET LAUNCH: ____/____/20____

1. BUSINESS OVERVIEW, TARGET AUDIENCE & UNIQUE VALUE PROPOSITION

Company Mission & Elevator Pitch: _____

Ideal Customer Profile (ICP) & Core Demographics: _____

Primary Competitors in Space: 1. _____ 2. _____ 3. _____

Key Differentiator / What Sets Your Brand Apart: _____

2. STRATEGIC PROJECT GOALS & QUANTIFIABLE SUCCESS CRITERIA

G1. _____
G2. _____
G3. _____
G4. _____

3. SYSTEM ACCESS PERMISSIONS & BRAND ASSET HANDOVER CHECKLIST

☐ Vector Brand Logos (AI, SVG, EPS) & Typography Files Handed Over	☐ Google Analytics 4 (GA4) / Tag Manager Admin Access Granted
☐ Brand Style Guide, Official Hex Color Codes & Imagery Assets Provided	☐ Google Search Console / SEO Tools Delegated Access
☐ Website CMS Admin Login (WordPress / Shopify / Webflow / Custom)	☐ Social Media Platforms (Meta Business Suite, LinkedIn, X, TikTok)
☐ Web Hosting Server / SSH / cPanel / Cloud Console Access Credentials	☐ Email Marketing Platform (Klaviyo / Mailchimp / HubSpot / ActiveCampaign)
☐ DNS / Domain Registrar Access (GoDaddy / Namecheap / Cloudflare)	☐ Payment Gateway Access (Stripe / PayPal / Authorize.Net / Merchant Portal)

4. COMMUNICATION CADENCE & ESCALATION PROTOCOLS

FORMAL ONBOARDING ACCEPTANCE & PROJECT COMMENCEMENT AUTHORIZATION:

Client Lead Signature: _____

Agency Director Signature: _____

Date Signed: ____/____/20____

Date Signed: ____/____/20____