# Client Onboarding for Copywriting Projects

Run this checklist each time a new client needs onboarding.

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## 1 Introduction:


So you've just closed a deal with a hot new client, and now you're faced with your next challenge: onboarding them in order to **keep that initial momentum going** and **kick-start a great working relationship.**

When you're onboarding new clients (or customers), you want to **make sure they feel welcomed** and to **reinforce their feeling that they have made the right choice** in choosing you as the solution to their problem. This will include addressing any questions, gathering necessary information, and making preparations **so that the project can begin as soon as possible, and as smoothly as possible.**

For all of this to happen, you need to nail down a solid client onboarding process; **without a process like this in place, you risk one of the biggest mistakes (https://www.verticalmeasures.com/blog/vm-news/4-mistakes-when-using-a-digital-marketing-agency/)** as a digital marketing agency.

We made this checklist for new client onboarding so that you, as your marketing agency's project manager or client onboarding specialist, will be able to **optimize the process that begins your working relationship** with a new client.

By running this checklist, you'll be able to **save time and resources** by automating tasks, **increase client satisfaction** by making sure their needs and concerns are understood and addressed throughout the onboarding process, and ultimately **reduce turnover rate** and **position yourself for a glowing testimonial** further down the line.

Let's get started! (https://www.propellercrm.com/blog/customer-acquisition-cost)

## 2 Client preparation:

## 3 ☐ Record basic details for this client

Firstly, **record some basic information about the client.** These details will be useful for automating basic tasks later on in the process.

> If you haven't already, you can **set up Zapier (https://www.process.st/business-process-automation-guide/) to launch instances of this checklist template** in the future and push information you already have stored in your CRM into any task's form fields automatically, based on a trigger like changing a lead's status from "qualified" to "customer".

**Fill out the form fields** below.

**Client first name** *

**Client last name** *

**Client company name** *

**Client email address** *

Alternately, you could **set up a Zapier integration** to push the information gathered in this (or any other) task into your CRM database (https://www.process.st/help/docs/close-io/).

Even if you already have the client in your CRM, this task will help to automate parts of tasks later on in this process.

## 4 Send contract and additional documents

Be sure that the contract has been sent out to the client for them to sign. This process needs to be started early on, so that time lost to clients delaying contract signing is minimized.

You can use Zapier's to **automatically send a new contract each time you run this checklist**, giving you the power to customize contracts (or any document) with data gathered from checklists. For an example of how to set this up, **take a look at this HelloSign + Process Street integration (https://zapier.com/apps/hellosign/integrations/process-street) tutorial.**

**Mark the sub-task as complete** once you've sent out the contract document.

1. Contract sent *

You may also need additional documents, such as a non-disclosure agreement (NDA) or similar confidentiality forms.

**Use the sub-tasks below** to keep track, if need be.

1. NDA sent
2. Additional documents sent

## 5 Check signed documents have been received

Before you move forward, it's important to **make sure the signed contract and any additional documents requiring the client's signature have been received back.**

1 ☐ Signed contract *

If you're not using an e-signature tool like HelloSign (https://zapier.com/apps/hellosign/integrations/process-street), you may want to **upload the signed contract to the file upload form field** in this task**.** That way you'll have a copy stored against the record of your onboarding process for this client.

**Signed contract document**

If there are additional documents, **mark them as received and upload signed files** as you see fit.

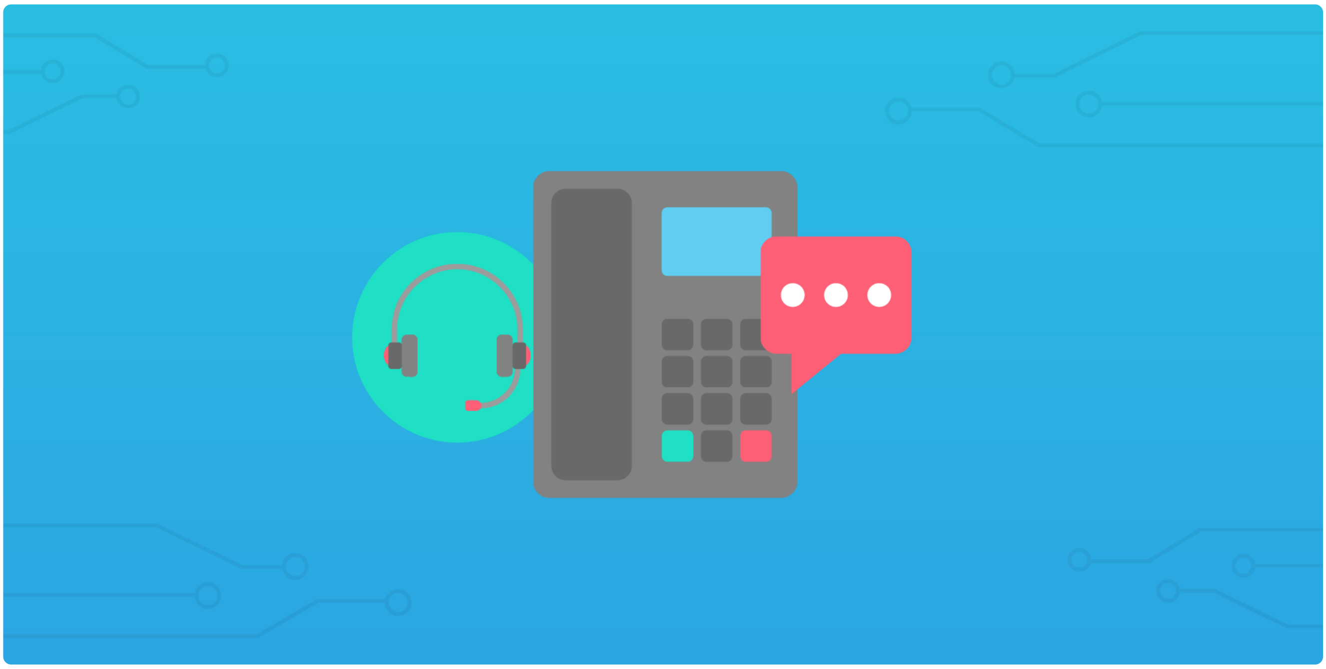
1 ☐ Signed NDA

2 ☐ Additional signed documents

**Signed NDA document**

**Additional signed documents**

## 6 ☐ Have an onboarding call with the client



During this call, you should clearly outline the 12-month plan and make it clear how you and your agency fit into the picture.

You can also take this opportunity to ask any questions, and allow the client to air any questions they might have as well.

Once scheduled, **note the date of the meeting alongside the planned agenda below:**

**Date of project kick-start meeting** *

**Meeting agenda**

Finally, after-the-fact, you can **jot down any notes pertaining to the call** for future reference. These details will be used to automate some smaller tasks later on in the checklist.

**Post-meeting notes** *

7 Send welcome email


The goal of a welcome email is to **preserve momentum built up during the initial closing process** and answer some of the client's common doubts or questions that might arise before the project starts.

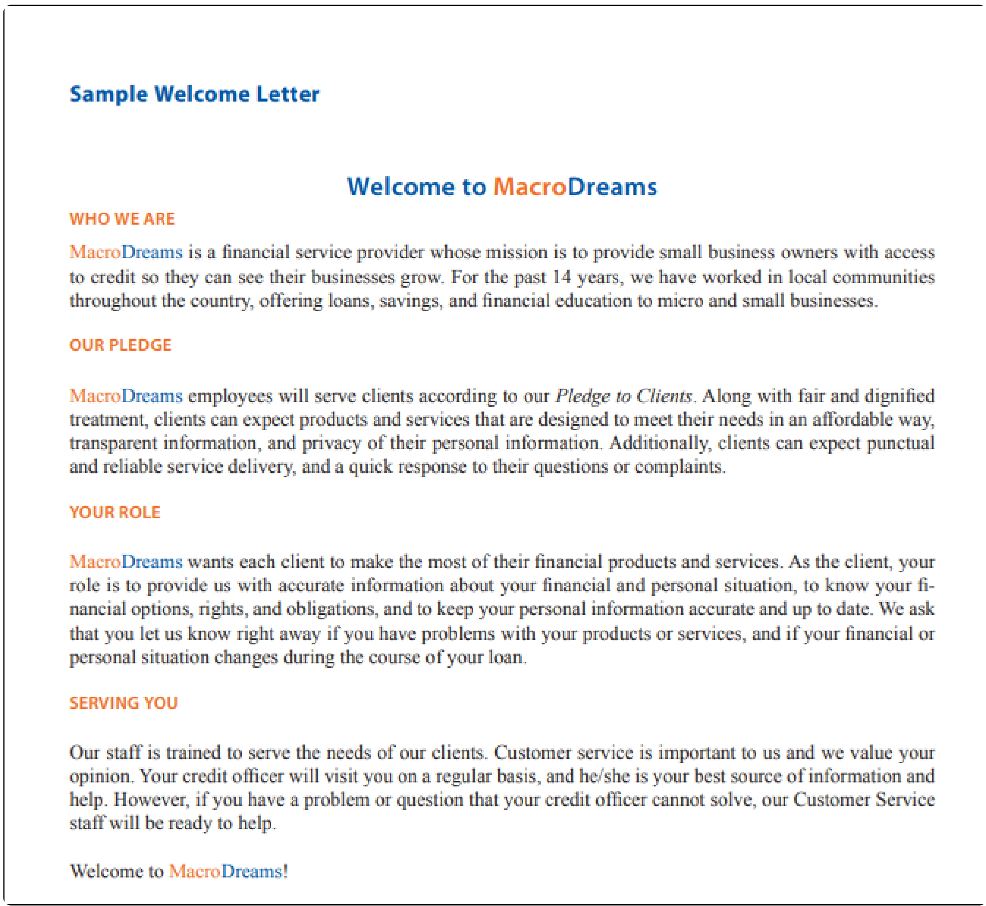
For many companies, a welcome email might include a **short PDF document** that contains a brief introduction to the most important information about the working relationship between yourself and your new client.

Ideally, you will **send the welcome email as soon as the contract has been finalized, and before work on the project has actually begun.**

Consider including the following in your welcome email:

1. Brief introduction to your company
2. Welcome video
3. Digital brochure
4. 1-3 of your most popular articles
5. Articles that have been written about your business
6. Testimonials, case studies
7. Press releases

Below you will find an example of the structure of a welcome email, outlining an executive summary of the company's values and their relationship with a new client:



**Sample Welcome Letter**

**Welcome to MacroDreams**

WHO WE ARE

MacroDreams is a financial service provider whose mission is to provide small business owners with access to credit so they can see their businesses grow. For the past 14 years, we have worked in local communities throughout the country, offering loans, savings, and financial education to micro and small businesses.

OUR PLEDGE

MacroDreams employees will serve clients according to our *Pledge to Clients*. Along with fair and dignified treatment, clients can expect products and services that are designed to meet their needs in an affordable way, transparent information, and privacy of their personal information. Additionally, clients can expect punctual and reliable service delivery, and a quick response to their questions or complaints.

YOUR ROLE

MacroDreams wants each client to make the most of their financial products and services. As the client, your role is to provide us with accurate information about your financial and personal situation, to know your financial options, rights, and obligations, and to keep your personal information accurate and up to date. We ask that you let us know right away if you have problems with your products or services, and if your financial or personal situation changes during the course of your loan.

SERVING YOU

Our staff is trained to serve the needs of our clients. Customer service is important to us and we value your opinion. Your credit officer will visit you on a regular basis, and he/she is your best source of information and help. However, if you have a problem or question that your credit officer cannot solve, our Customer Service staff will be ready to help.

Welcome to MacroDreams!

*Sample welcome PDF from MacroDreams*

If you already have a template PDF ready to be customized to welcome a new client, **you can edit this template (https://www.process.st/help/docs/templates/) so that the file upload field below includes that master.** That way, anyone running this checklist will be able to quickly and easily access it and make necessary alterations before sending it off.

## 8 Send new client questionnaire

One of the first things you'll need to do is **send your new client a questionnaire** with questions that will help you gain insight into the project and align you and your team with the client's goals and needs as a business.

You can do this via email or using a tool like Wufoo (http://www.wufoo.com/) or Survey Monkey (https://www.surveymonkey.com/). Take a look at the bulleted list below for some ideas for what to include as a marketing agency.

**Example Questionnaire for a Marketing Agency:**

- What tools and platforms are you currently using in your marketing efforts?
- What are your goals? Is this leads, customers, or revenue?
- What is the lifetime value (LTV) of each customer? What is your LTV goal?
- Do you have customer personas? Who is your ideal client?
- How much does it cost you to acquire a customer?
- What ROI have you seen on your current marketing efforts? What are you currently investing in?
- What percentage of your customers is generated through online methods?
- What are the steps in your sales process? What are the common hesitations clients have?
- How do you currently find leads? Do you know what your cost per lead is? Do you know what your lead-to-conversion rate is?

First, **set a deadline** for the questionnaire:

**Deadline for questionnaire** *

Then, **use the email widget (https://www.process.st/help/docs/using-email-widget/) below to forward your questionnaire to the client.**

In the sample email is a placeholder URL (one of the questionnaires we use at Process Street) which will automatically pull the email address of your client that you entered earlier into the URL.

You'll want to either create your own questionnaire with Typeform or an equivalent tool, and replace the Process Street URL below (making sure to keep the same URL structure in-tact).

Then just **make sure everything looks okay and hit "Send".**

**To**

Client email address

**Subject**

Client first name - Questionnaire

**Body**

Hi there,

To make sure we have everything we need to start the project, we've prepared a quick survey for you to complete that will help us to start work as soon as possible and hit the ground running.

Here's the URL:
https://processstreet.typeform.com/to/LpNTm2?email= Client email address

Just fill out the questionnaire as soon as you can and we'll receive the results as soon as you hit submit.

Ideally, we will need the questionnaire finished by Deadline for questionnaire .

If you have any questions or you're not sure about something in the questionnaire, as always you can reach me with this email.

Thanks again,
Current user's name

## 9 Request marketing and media resources from the client

Contact the client and **request any remaining resources needed to start work on the project.**

This might include:

1. Media style guide
2. Company logos
3. Promotional media (images, video, text)
4. Email list
5. Access to social media accounts
6. Access to Google Analytics data
7. Affiliate information

**Determine a deadline** for receiving back the marketing and media resources and **record the exact date in the form field below.**

**Deadline for marketing media recources** *

## 10 Confirm marketing and media resources received

Check this task as soon as you receive everything you need to start the project.

**Consider uploading the files to the form fields below** so that they're on hand for future reference.

**Media style guide (.zip, .rar)**

**Company logo (.png, .tiff)**

**Email list (.csv)**

**Promotional media (.png, .pdf, .doc, .mp4)**

## 11 Setting the agenda:

## 12 Research campaign ideas

Do some research into the different campaign ideas you could approach for this project. Utilize all the information you have on file about this client, including sales calls, questionnaires filled out, plus documents and resources they've already provided.

Check out some competitor companies and see what worked or didn't work in those cases; insight from competitors can often be invaluable and should always be taken into consideration.

**Collect your findings in a document** using a tool like Dropbox Paper (https://paper.dropbox.com/) or Google Docs (https://docs.google.com); make sure the presentation is clear as this will be an invaluable resource in communicating to the rest of the team later on in the process.

**Research document URL**

## 13 Create marketing plan first draft

Your goal is to **position yourself as a key component in the success of your client's business over the course of the next 12 months.**

Using the invaluable information from your strategically-crafted questionnaire, you'll be able to devise a plan of action for the next 12 months that will directly address their business goals and ensure that you maximize the efficacy of this marketing campaign.

One of the most useful resources will be the completed questionnaire from the previous task. You may not have received this back yet, but if you have it will be invaluable in building the 12-month roadmap.

**Upload a copy of the finished plan document to the form field below**, to keep it on record.

**12 month marketing plan document (.doc, .odf, .pdf)** *

Once you've done this, consider whether you have everything you need to start work on the project and **record your answer in the form field below.**

## 14 Schedule future calls

Contact your client and work out a long-term schedule for progress calls over the next few months, including the initial onboarding call to kick-start the project.

You can use a calendar tool like Calendly (https://calendly.com/) to allow your clients to schedule multiple meetings with the same URL (https://help.calendly.com/hc/en-us/articles/226767207-Add-a-link-to-the-confirmation-page#1). **Input your own custom Calendly link in the Send Email widget below,** editing the body of the email to suit your personal schedule plan.

**To**

Client email address

**Subject**

Client first name - schedule upcoming progress calls

**Body**

Hi Client first name,

We're just wrapping up preparations for the project start, and part of that prep is scheduling a timeline of progress calls over the next few months.

The way we like to do things is, beginning with an initial kick-off call (within the next week or so), there will be a progress call about once a month for the next 3 months, and then twice a month for the last three months.

You can use my Calendly link to book the calls: [CALENDLY LINK]

If you have any questions or thoughts about the proposed schedule, just let me know. As always you can reach me on this address.

Thanks again,
Current user's name

## 15 Update client's CRM and project management profile

Whatever you use to manage your current customer and project status, make sure to update all CRM and project management databases with any new information after the initial call.

> This a great opportunity to utilize the power of Process Street's 1000+ (https://www.process.st/help/kb/integrations/) integrations (https://www.process.st/help/kb/integrations/); for example, you could set up a Zap that **pushes call notes recorded in previous tasks straight into your CRM (https://www.process.st/help/docs/salesforce/)** when this task is checked.

This might be as simple as updating some notes on your client's profile or recording a certain deadline or milestone. Whatever the case, **use the sub-tasks below** to keep track of your progress.

1. CRM updated *
2. New agenda task created in project management tool *

## 16 Confirm questionnaire is complete

Before you progress, you must **ensure the questionnaire is received back finished from the client**. Once you've confirmed it has been completed, simply mark this task as complete and move on.

## 17 Project start:

## 18 Brief the team and assign work

Using the notes you recorded during the initial call with the client, **brief the team on the scope of the project**, including an outline of the most important tasks and a clear definition of any milestones during the course of the project.

Your 12-month plan will prove useful here to make sure everyone is on the same page, and that there is a solid bedrock from which to delegate and take on the project in the most efficient way possible.

This step also involves deciding what work is going to be allocated to whom, and that everyone is duly notified of their roles and responsibilities. **Use the sub-checklist below to track progress.**

1. Everyone involved in the project understands their part in the 12-month plan *
2. Work has been assigned to everyone in the team *

## 19 Inform client of project start

Send a quick email to the client to thank them for their time and dedication so far, and to notify them that work has officially begun on the project.

There isn't necessarily much information to impart here; it's more a gesture towards keeping your client updated and the processes behind the project as transparent as possible.

The widget below has a template email with the client's email address auto-filled already. It's worth spending some time personalizing parts of this to best suit your situation with the client, so be sure to **edit the body of the template that's listed inside of square brackets.**

**Give it a look over and edit it to suit your needs**, then hit "Send" before moving on to the next task.

**To**

Client email address

**Subject**

Client first name - thanks for the recent call

**Body**

Hi there,

I'm happy to announce that work has begun on the marketing campaign in an official capacity as of this morning.

I'd also like to take the time to thank you for our last call; now that we've had a chance to talk in-depth about your goals and needs for your company, I feel like we are positioned better than ever to deliver outstanding results in the upcoming campaign.

[INSERT PERSONALIZED RESPONSE HERE]

Should you have any further questions, feel free to contact me at this email. You can expect regular updates in the coming weeks.

Regards,
Current user's name

## 20 One week into the project:

## 21 Have a follow-up call

One week into the project, or since your last call is a good time to have a follow-up with your client to address any concerns they might have, as well as give them routine updates.

Even if they have access to a project view where they can see updates, delivering this information in a short, formal call can do well to assure the client that the project is progressing as planned, and to reassure them that they have made the right choice in choosing you as their solution.

Once scheduled, **record the date of the first follow-up call below.**

**Date of first follow-up call** *

**Make notes on the call**, and then consider whether the feedback from the client means that any changes to the marketing strategy will need to be made, and **record your decision below.**

**Follow-up call #1 notes**

**Follow-up call #1: do any changes to the marketing strategy need to be made?** *

An option will be selected from this list:

1 Yes

2 No

Make a point to **send a follow-up email as soon as you get off the call**, including all the information discussed, so that there is a clear record of each exchange for everyone involved.

1 ☐ Follow-up email summarizing first follow-up call sent *

22 ☐ Make changes based on follow-up call

Based on the feedback to the first follow-up call, **apply the suggestions made by your client to the marketing plan and inform the team of any revisions.**

**Be sure to record the changes that need to be made in the form field below.**

**Changes to marketing plan after 1 week** *

Use this sub-checklist to keep track of progress:

1 Revise marketing plan *

2 Update marketing plan document *

3 Inform team of any changes *

## 23 Four weeks into the project:

## 24 Have a second follow-up call

To make sure that you address any concerns and keep the client in good faith, **have an additional follow-up call with them** about four weeks into the project to make sure everything is going well.

Once again, **record the date of the follow-up call with the form field below.**

**Date of second follow-up call** *

**Then, as before, make notes on the call.**

You should always consider how the current strategy could be improved; all feedback from your client is a valuable insight into what could potentially be faults in your plan.

**Use the form fields in this task to record your thoughts and findings.**

**Follow-up call #2 notes**

**Follow-up call #2: do any changes to the marketing strategy need to be made?** *

An option will be selected from this list:

1 Yes

2 No

After the call, it's a good idea to **chase them with an email summarizing everything you discussed**, including project status updates, issues the client might have had, and any additional details.

1 Follow-up email summarizing the second follow-up call sent

## 25 Make changes based on second follow-up call

If your client has any problems, they will have communicated them to you in your last call. Based on this feedback, make any changes you deem necessary to course-correct and eliminate the client's concerns.

**Be sure to record the changes that need to be made in the form field below,** and as before, it's important to inform the whole team of any changes made.

**Changes to marketing plan after 4 weeks** *

1 Make necessary changes to marketing plan

2 Update the master document

3 Make sure the team are informed of any changes

## 26 Send a post-onboarding survey

Take some time to **send a post-onboarding survey to your customer** to gather valuable information about their opinion of your service, and how the whole process went for them. This can help you to understand where improvements could be made.

Questions you might want to include in your survey could look like this:

- What did you like about the process?
- What didn't you like?
- Did you feel like there was anything missing from the process?
- How do you think the process could be improved?

And of course, don't forget to thank them for their time! Strictly speaking, this probably won't be much help to them (unless they're a returning customer), but can be hugely useful for you when dealing with future clients.

Similar to some of the earlier tasks, you can **edit this checklist's template** so that the file upload field contains your default post-onboarding survey.

## 27 Sources:


- Steff Green (https://twitter.com/workflowmax) - Why is Client Onboarding Important for Your Agency? (http://www.workflowmax.com/blog/why-is-client-onboarding-important-for-your-agency)
- Hubspot (https://blog.hubspot.com/) - Customer Onboarding (https://blog.hubspot.com/service/customer-onboarding)
- Smartsheet (https://www.smartsheet.com/) - Definitive Guide to Client Onboarding (https://www.smartsheet.com/definitive-guide-client-onboarding)
- Carrier Management (https://www.carriermanagement.com/) - Client Onboarding Process (https://www.carriermanagement.com/features/2016/02/11/150897.htm)
- Hubspot (https://blog.hubspot.com/) - Customer Onboarding (https://blog.hubspot.com/service/customer-onboarding)
- CFP (https://www.cfp.net/) - Standards of Professional Conduct: Compliance Checklist (https://www.cfp.net/docs/for-cfp-pros---professional-standards-enforcement/standards-of-professional-conduct-compliance-checklist.pdf?sfvrsn=0)
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## 28 Related checklists:

- Client Onboarding for Financial Planners (https://www.process.st/checklist/client-onboarding-for-financial-planners/)
- Client Onboarding Checklist for Criminal Law Firms (https://www.process.st/checklist/client-onboarding-for-criminal-law-firms)
- High Touch Client Onboarding for SaaS Companies (https://www.process.st/checklist/high-touch-client-onboarding-for-saas-companies/)
- Website Design Client Onboarding Template (https://www.process.st/checklist/website-design-client-onboarding-template/)
- Landlord Onboarding Checklist (https://www.process.st/checklist/landlord-onboarding-checklist/)
- Client Onboarding Checklist for an Accounting Firm (https://www.process.st/checklist/client-onboarding-checklist-for-an-accounting-firm)
- Patient Intake Checklist for a Dental Clinic (https://www.process.st/checklist/patient-intake-for-a-dental-clinic/)
- Patient Intake Checklist for a Medical Clinic (https://www.process.st/checklist/patient-intake-for-a-medical-clinic)
- Client Onboarding Checklist for Real Estate Sales (https://www.process.st/checklist/client-onboarding-checklist-for-real-estate)
- Client Onboarding Checklist for a Managed Service Provider (https://www.process.st/checklist/client-onboarding-process-for-a-managed-service-provider/)
- Client Onboarding Checklist for a Software Development Company (https://www.process.st/checklist/client-onboarding-checklist-for-a-software-development-company/)
- Client Onboarding Checklist for Management Consulting (https://www.process.st/checklist/client-onboarding-checklist-for-management-consulting/)
- Client Onboarding Checklist for an Insurance Broker (https://www.process.st/checklist/client-onboarding-checklist-for-an-insurance-broker/)