**Onboarding Checklist**

The Onboarding Checklist helps ensure the agency teams are fully up to speed on the Client’s business and are ready to add value as quickly as possible. Determine the schedule that best fits the Client’s needs.

First, select the right people. Despite all the advances in technology, business success still comes down to people; the right people, the right relationships.

What to look for when creating the team:

* Chemistry – who fits and who doesn’t?
* Category – who knows it and who doesn’t and wants to learn?
* Seniority – how much experience does the new Client require
* Passion – who has passion for the account and who doesn’t?
* Commitment – who has time to make the necessary commitment to the business?
* Culture – who is a natural fit and who would be a force fit?

Onboarding should occur with the Agency’s core team and members of the Agency’s Executive Management. The Onboarding Checklist itself encompasses 10 key items:

1. Agreement on Communication styles and preferences (by individual client):

* Phone – office or cell or both
* Email
* Text – to what number
* Video chat – what provider/platform
* What is acceptable response time?
* In-person – frequency / location
* What are office hours?
* What type of communication is preferred after office hours, if necessary?
* What is our shared definition of urgent?

2. Kick-off Workshop (single or multiple days) with the Agency Core Team, Executive Management and key Client stakeholders:

* Client’s vision – health of the company/brand today and expectations for the future
* Client’s goals – short- and long-term / attainability / stretch / level of aggressiveness /
* Client’s work streams
* Agency’s vision for the Client
* Agency’s goals for the Client
* Agency’s goals for itself, relevant to the Client
* Client Deep-dive / full induction with Client key stakeholders and Agency’s Core Team and Executive Management. Topics to be covered include all relevant: KPIs, key competitors, distribution issues, regulatory issues (if any), sales targets, customer data, sales data, etc.

3. One-to-one meetings between key Agency and Client contacts – schedule meetings to understand key Client’s pain points and critical success measures

4. “Walk In Your Shoes” – schedule time for the Agency’s Core Team to work at the Client in different departments

5. Agreement on ways of working, including making allowances for existing procedures and understanding the Client’s overall style and ethos

6. Review and analysis of past campaigns and plans to understand best practices, what’s been working and what has not

7. Review and analysis of competitive landscape and further research into customer journey and experience

8. Debrief on the pitch presentation and agreement on strategic and executional details, any additional feedback, and next steps

9. Review and agreement of final scope and detailed project deliverables, and timing for key milestones

10. Alignment on KPIs against which the Agency and Client will be measured