# Client Onboarding Checklist

* Client:
* Marketing Specialist:
* Entered into Client Assignments Spreadsheet
* Invoice
* Contract
* Contact Info
* Name:
* Phone:
* Email:
* Client Profile Meeting w/ Client
* Date of Completed Onboarding:

## Notes:

## Onboarding Process

1. Sales will send a contract and estimate to the client.
   1. Once approved, Sales tells the Accountant the Estimate number, and all details regarding the first payment.
      1. This may include a check, credit card information, pay schedule, and any contact information not in Quickbooks.
2. Sales gets approval on which Marketing Specialist will be assigned to the client from the VP of Operations, or the Creative Director of Inbound
3. Sales then creates a new row on the Client Assignments Spreadsheet with all available information.
   1. This generally will be all rows except the Content Creator assignments.
4. Sales meets with the MS, before meeting with the client. Discuss all the needs and desires of the client, as well as their pain points and risks. In this meeting, provide them with the following paperwork:
   1. Invoice
   2. Contact Information
   3. Contract
   4. Any other pertinent information
5. Meet with the client and the account manager, to introduce the MS.
   1. MS leads the discussion to fill out the Client Profile.
   2. MS gets all pertinent Contact Information for the client and gives the client their information.
   3. The client should specifically be informed that this MS is their new point of contact.
   4. Setup next meeting with production, to fill out a creative brief for any of the projects of the client.
   5. (Sales needs to stay for the whole meeting to ensure a successful handover)