

Onboarding Checklist

Starting with a New Company

Leadership

- ☐ Team structure
- ☐ Roles & responsibilities
- ☐ Annual goals & reviews
- ☐ Creative production process
- ☐ Content production process
- ☐

Paid

- ☐ KPIs & reporting
- ☐ Budget
- ☐ Forecast
- ☐ SEM account review
- ☐ Social account review
- ☐ Landing page strategy
- ☐ Lead forms
- ☐ CRM connections

Brand

- ☐ Brand book
- ☐ Competitive review
- ☐ USP
- ☐ Presentation template
- ☐ Lexicon of terms
- ☐ KPIs & reporting

Content

- ☐ Writer's guide
- ☐ Content calendar
- ☐ Descriptive text – short form
- ☐ Descriptive text – long form
- ☐ Netiquette
- ☐ Email automation workflows
- ☐ Social media response guide
- ☐ KPIs & reporting

Customer Profile

- ☐ Customer journey
- ☐ Marketing funnels
- ☐ Segmentation
- ☐ Personas
- ☐
- ☐

Online

- ☐ Website navigation & structure
- ☐ Blog structure
- ☐ GMB, Bing for Business
- ☐ LinkedIn
- ☐ Core web vitals
- ☐ Keyword review
- ☐ KPIs & reporting
- ☐

Metrics & Reporting – SEM

Previous 2 Weeks

Also available: Previous 30 Days, Previous 90 Days, Year to Date

Total

Also available: By supplier

Impressions

	Vs LY	Vs PP
--	-------	-------

Cost

	Vs LY	Vs PP
--	-------	-------

Conversions

	Vs LY	Vs PP
--	-------	-------

ROAS

	Vs LY	Vs PP
--	-------	-------

Clicks

	Vs LY	Vs PP
--	-------	-------

Average CPC

	Vs LY	Vs PP
--	-------	-------

Conversion Rate

	Vs LY	Vs PP
--	-------	-------

CTR

	Vs LY	Vs PP
--	-------	-------

Page Views

	Vs LY	Vs PP
--	-------	-------

COA

	Vs LY	Vs PP
--	-------	-------

A/B Testing

	Test 1	Test 2	Test 3
Test:			
Initial Results:			

Metrics & Reporting – Display & Video

Previous 2 Weeks

Also available: Previous 30 Days, Previous 90 Days, Year to Date

Total

Also available: Google, Bing

Impressions

	Vs LY	Vs PP
--	-------	-------

Cost

	Vs LY	Vs PP
--	-------	-------

Conversions

	Vs LY	Vs PP
--	-------	-------

ROAS

	Vs LY	Vs PP
--	-------	-------

Clicks

	Vs LY	Vs PP
--	-------	-------

Average CPC

	Vs LY	Vs PP
--	-------	-------

Conversion Rate

	Vs LY	Vs PP
--	-------	-------

CTR

	Vs LY	Vs PP
--	-------	-------

Page Views

	Vs LY	Vs PP
--	-------	-------

COA

	Vs LY	Vs PP
--	-------	-------

A/B Testing			
	Test 1	Test 2	Test 3
Test:			
Initial Results:			

Metrics & Reporting – Social Media

Previous 2 Weeks

Also available: Previous 30 Days, Previous 90 Days, Year to Date

Facebook

Also available: Instagram, X,
TikTok, Pinterest

Social

Impressions

Vs LY

Vs PP

Reach

Vs LY

Vs PP

Followers

Vs LY

Vs PP

Engagement Rate

Shares

Page Views

Paid Impressions

Vs LY

Vs PP

Conversion Rate

Vs LY

Vs PP

COA

Vs LY

Vs PP

Like to Dislike Ratio

Metrics & Reporting - Organic

Last 30 Days

Organic

Organic Traffic

Referring Domains

Backlinks

Top 3 Positions

UP

DOWN

Position 4-10

UP

DOWN

Position 11-50

UP

DOWN

Search Visibility

Featured Snippets