

Client Onboarding Checklist

Section 1: Access

Instructions: Secure all access needed to manage the client's social accounts and assets.

- * **Social accounts:** Admin or equivalent access to each platform (Instagram, Facebook, TikTok, LinkedIn, etc.) the client wants managed. Document login method (password manager, shared vault).
 - * **Assets:** Access to brand assets (logos, fonts, colors) and any existing content library or drive.
 - * **Tools:** Invite client to your scheduling/analytics stack ([Later](later-setup-guide.md), [Metricool](metricool-setup-guide.md), [Buffer](buffer-paid-setup-guide.md)) where applicable; confirm they've accepted.
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Section 2: Brand and Guidelines

Instructions: Capture brand voice and rules so content stays on-brand.

- * **Brand kit:** Colors, fonts, tone (from [Client Onboarding Framework](client-onboarding-framework.md) Part 2). Align with Canva or your design tool.
 - * **Do's and don'ts:** Any content or topics to avoid; preferred hashtags or CTAs.
 - * **Approval:** Who approves posts (if required) and typical turnaround time.
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Section 3: Content Calendar Setup

Instructions: Establish the content calendar and first batch.

- * **Calendar:** [Content Calendar Template](content-calendar-template-spec.md) (or your XLSX) set up for this client; first 2 weeks (or first month) drafted.
 - * **Cadence:** Posting frequency per platform agreed and documented.
 - * **First batch:** First week of content scheduled or ready to schedule in [Later](later-setup-guide.md) / [Buffer](buffer-paid-setup-guide.md).
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Section 4: First Report Date

Instructions: Lock in reporting cadence and first deliverable.

- * **Cadence:** Reporting frequency agreed (e.g. monthly) and first report date set.
 - * **Template:** [Client Reporting Template](client-reporting-template-spec.md) (DOCX) shared or confirmed; client knows what to expect.
 - * **KPIs:** Key metrics and goals for the first report confirmed (from [Client Onboarding Framework](client-onboarding-framework.md) Part 4).
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