

# Client Onboarding Checklist

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## 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.xlsx) (XLSX) (or your own spreadsheet) 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.docx) (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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