Client Onboarding Checklist - Content Specification

This file is the content specification for the PDF Client Onboarding Checklist (Level 2). Use it to regenerate or update the PDF so the wording and structure stay consistent with the package. Terminology follows TERMINOLOGY_STYLE_GUIDE.md (../docs/TERMINOLOGY_STYLE_GUIDE.md).

Level 2 context: Social media management service; time investment 4-6 weeks; expected revenue $1,000-$3,000/month.

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.

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.

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).

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).

Notes

* Use with the [Client Onboarding Framework](client-onboarding-framework.md) for full kickoff flow; this checklist is the executable summary.
* Document in README.md. The actual PDF is downloadable from the Templates section; this spec is for authoring or recreating the checklist.