Onboarding Doc Sample

Hi {Company}, Welcome to Parrot! 🦜

We're excited to have you join our **Growth Partnership** — a focused partnership designed to accelerate growth through a performance-driven paid media and creative strategy.

Step 1: Account Access

To get started, we'll need access to your existing advertising accounts. Please ensure the following:

Meta (Facebook & Instagram):

Add our Paid Social Lead as a Full control(admin) user in your **Meta Business Manager** and add our agency portfolio as a partner. To add a full control user:

- Go to **Business Settings** > **Users** > **People** > **Invite person**

- Add justin@withparrot.co and please make sure to toggle on Full control - everything.

- You can skip the "assign assets" section and simply invite with zero assets. As an admin Justin will be able to self assign later on.

To add partner connection:

- Go to **Business Settings** > **Users** > **Partners** > **Add > Give a partner access to your assets**

- Enter our Meta portfolio ID: **2539720219707398**

- Grant us access to your ad accounts, pages, catalogs, datasets, domains, and pixels. Ensure all toggles are turned on for maximum access levels.

Google Ads:

Share access to your **Google Ads Account**.

- Navigate to **Tools & Settings** > **Access and Security** > **Security Tab**.

- Navigate to "Allowed Domains" > Add Domain > withparrot.co > Save
- Navigate to **Tools & Settings** > **Access and Security** > **Invite Users**.
- Use this email: **tyler@withparrot.co**
- Assign **Admin** access.

Google Analytics:

Grant us access to your **Google Analytics Account**.

- Go to **Admin** > **Account Settings** > **Account Access Management**.
- Add **tyler@withparrot.co** with **Edit** permissions.

Google Merchant Center

If you have a **Google Merchant Center** account (at merchants.google.com), please grant access:

- Go to **Settings > Account Access > Add User**.
- Use **tyler@withparrot.co** and assign **Admin** access.

YouTube Studio:

If you have a **YouTube Channel**, please add us to your **YouTube Studio** account:

- Go to **Settings > Permissions > Invite**.
- Enter **tyler@withparrot.co** and select **Manager** role.

Shopify:

To ensure we can manage tracking, integrations, and performance, please grant Parrot access to your Shopify store.

- **Option 1:**
  - Go to Settings > Users and Permissions
    - Generate a 4-digit collaborator code
  - Send both the code and your store URL with n@withparrot.co
- **Option 2:**

1. Log in at admin.shopify.com as the store owner.

2. Go to **Settings → Users and Permissions.**

3. If a **collaborator request** from Parrot is visible, approve it under **Collaborators.**

4. If not, click **Add staff** or **Add collaborator.**
   - Enter **n@withparrot.co**

5. Grant the following permissions:
   - Orders
   - Products
   - Customers
   - Online Store (including Themes)
   - Settings
   - Apps and Channels
   - Marketing
   - Reports and Analytics

6. Click **Send Invite.**

7. Once access is approved, our team will connect Shopify with Meta, Google, and analytics tools for full performance tracking.

Step 2: Creative Assets

To create effective campaigns, we'll need your creative assets. Please provide the following:

- *Branding Assets Folder* → Logos, fonts, colors, etc.
- *Photo/Video Folder* → High-quality images and videos of your products.
- *Existing Ads Folder* → Any existing ad creatives or examples of past campaigns.

- ***Inspiration Folder*** → Any inspiration from other brands creative you'd like to emulate.

You can upload these assets to the Google Drive which is also bookmarked in your ClickUp Space. If you have any external drive sources (Dropbox, OneDrive, etc) please share via email with our team and we will link it to this space.

Step 3: Kickoff Call

This is where we officially get in sync. The kickoff call isn't just about logistics — it's about alignment, understanding, and setting the tone for how we'll grow together.

During this session, we'll:

- Get a full picture of your brand, goals, and audience.

- Discuss a collaborative creative strategy

- Align on what success looks like in this initial phase.

- Outline how we'll collaborate, communicate, and move fast.

Think of it as our starting line — the point where strategy meets execution and the real work begins.

Book here!

Step 4: Campaign Launch

Once all steps are completed, we'll begin building and launching your campaigns. You'll receive regular updates and performance reports to keep you informed every step of the way.

Questions?

Your brand is now a member of the *Parrot* family - you can reach us through email, ClickUp, or Slack whenever you need us!

Key Onboarding Topics to Align On:

- Top 5 Competitors
- 5 Companies you love creative from
  - Reference Facebook Ads Library
- Target Audiences
- Key USP's/Value Props relating to each audience
- Who is your best customer (highest AOV / LTV)
  - Age
  - Gender
  - Location
  - HHI
- What's your most popular product
- What are your key areas of focus as a brand today
- What does success in this partnership look like to you from a results and communications standpoint (every brand is different, some want daily updates, some want to communicate over weekly meetings)
- What is your LTV
  - Do you need help identifying
- What is your AOV
- What is your North Star KPI/How Do you measure success
  - Blended ROAS/MER, ROAS, CPA, CPL, CAC:LTV
- What are your growth goals
- What do you believe is holding you back from those goals
- What type of creative has worked best for you
  - UGC
    - What angles, hooks, types of creators, etc
  - Produced Videos

- Statics
- Motion Graphics
- What creative themes have **not** worked for you
- What is your starting budget