

CREATIVE AGENCY CLIENT ONBOARDING CHECKLIST

This checklist is provided by Clientish as a free, editable starting point. Replace the bracketed fields with your own details, assign an owner and due date to each item, and adapt the steps to your studio. Duplicate it for every new creative client.

Client: [Client Name] | **Creative lead:** [Name] | **Start date:** [Date] | **Scope:** [e.g. brand identity + ongoing design]

How to use: tick each box as it is completed, and fill the Owner and Due columns so every task has a name and a date.

Phase 1 — Before You Start (First 48 Hours)

Done	Task	Owner	Due
☐	Internal handoff from sales to delivery (goals, scope, promises)	☐	☐
☐	Confirm the signed contract and deposit are on file	☐	☐
☐	Send the welcome message within one hour of signing	☐	☐
☐	Create the project workspace / portal	☐	☐
☐	Assign the team: creative lead, designer, escalation owner	☐	☐

Phase 2 — Immersion and Collection (First One to Two Weeks)

Done	Task	Owner	Due
☐	Run the brand immersion session (story, personality, audience,	☐	☐

	positioning)		
☐	Document the immersion so the whole team shares it (no repeat discovery)	☐	☐
☐	Send the onboarding questionnaire (see questions below)	☐	☐
☐	Collect the COMPLETE brand kit (see Brand Kit Checklist)	☐	☐
☐	Build and get sign-off on the creative brief and direction (see Brief worksheet)	☐	☐
☐	Set up the approval and version-control workflow (see Revision Rules)	☐	☐
☐	Collect access (platforms, drives, publishing tools)	☐	☐

Phase 3 — Ready to Create (Kickoff)

Done	Task	Owner	Due
☐	Confirm the complete kit, signed brief, approval rules, and access are all in	☐	☐
☐	Lock the revision and feedback rules	☐	☐
☐	Set up file organisation (folder structure, naming conventions)	☐	☐
☐	Run the creative kickoff (recap immersion, brief, direction, feedback process)	☐	☐

Brand Kit Checklist — Collect Complete, Not Piecemeal

Partial kits are the number-one cause of creative rework. Give every item an owner and a due date, and do not start design until the kit is complete.

Done	Asset	Owner	Due
☐	Logo — primary	☐	☐
☐	Logo — horizontal / stacked	☐	☐
☐	Logo — icon / mark only	☐	☐
☐	Logo — reversed / mono	☐	☐
☐	Colour values (HEX, RGB, CMYK, Pantone)	☐	☐
☐	Fonts + licence terms	☐	☐
☐	Brand guidelines / brand book	☐	☐
☐	Photography / imagery library	☐	☐
☐	Existing creative to reference or extend	☐	☐

Brand Immersion Worksheet

Capture during the Phase 2 immersion session. Document it so the whole team works from the same understanding.

Element	Notes
Brand story / origin	☐
Brand personality (adjectives)	☐
What the brand stands for	☐
What the brand stands against	☐
Target audience	☐
Positioning vs competitors	☐
Tone of voice	☐
What they love about their current brand	☐
What they want to change	☐

Creative Brief and Direction

Complete and get stakeholder sign-off BEFORE producing concepts.

Element	Notes
Project goal	[]
Deliverables	[]
Style direction	[modern, bold, minimal, etc.]
Mood boards / reference work	[links]
Colours and type direction	[]
Must-haves	[]
Hard no's	[]
Sign-off by	[stakeholder + date]

Revision and Version-Control Rules

Setting	Value
Revision rounds included per deliverable	[e.g. 2]
What counts as one round	[one consolidated set of feedback]
Rate beyond included rounds	[hourly rate]
Client feedback deadline	[e.g. within 5 business days]
What happens if feedback is late	[schedule shifts; studio does not absorb delay]
File naming convention	[e.g. client_project_vXX_date]
Where final files live	[shared drive / portal]

Access Checklist

Done	Access	Notes
[]	Shared drive / asset storage	[]
[]	Social or publishing platforms	[if delivering there]
[]	Scheduling / project tool	[]
[]	Any brand-managed accounts	[]

Creative Onboarding Questionnaire — Core Questions

Send to the client in Phase 2. Pre-fill anything already known from sales.

1. In one or two sentences, what does your brand do, and who is it for?
2. What should this creative work achieve over the next 90 days?
3. How would you describe your brand's personality in a few words?
4. What do you want people to feel when they see your brand?

5. Who are your competitors, and how do you want to look different from them?
6. Do you have a brand book, logo files, fonts, and photography ready? (Link them.)
7. What do you love about your current brand look, and what do you want to change?
8. Are there brands or design styles you admire? (Share two or three.)
9. Who approves creative on your side, and what is your feedback turnaround?
10. Are there any dates, launches, or campaigns we should plan around?

Sign-off

Onboarding completed by:	[Creative lead]
Complete brand kit received on:	_____
Creative brief signed off on:	_____
Creative kickoff held on:	_____

Want your clients to experience onboarding, not just your team? Clientish gives each new client a branded portal on your own subdomain from day one, where they see their orders and invoices and can open a support ticket instead of chasing email. Start a 7-day free trial at the Clientish site.