

PPC 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 agency. Duplicate it for every new PPC client.

Client: [Client Name] | **PPC lead:** [Name] | **Start date:** [Date] | **Platforms:** [Google Ads / Meta / Microsoft Ads]

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, budget, promises)	☐	☐
☐	Confirm the signed contract and scope are on file	☐	☐
☐	Send the welcome message within one hour of signing	☐	☐
☐	Set the expectation: ~2 weeks to go live, a few months to full performance	☐	☐
☐	Create the client workspace / portal	☐	☐
☐	Assign the team: day-to-day contact, PPC lead, escalation owner	☐	☐

Phase 2 — The First Week

Done	Task	Owner	Due
☐	Request manager-account (MCC) access	☐	☐

	to the client's ad accounts (see Access Checklist)		
☐	Confirm all access granted and working	☐	☐
☐	Settle billing ownership (client's own payment method on the ad account)	☐	☐
☐	Send the PPC onboarding questionnaire (see questions below)	☐	☐
☐	Audit existing campaigns and account history (keep / fix / retire)	☐	☐
☐	Verify conversion tracking (see Conversion Tracking Checklist)	☐	☐
☐	Capture the performance baseline (see Baseline table)	☐	☐

Phase 3 — The First 30 Days

Done	Task	Owner	Due
☐	Build the campaigns (structure, targeting, creative) and get client approval	☐	☐
☐	Launch with a QA sign-off (budgets, targeting, tracking, negatives, creative)	☐	☐
☐	Deliver one quick win within the first ten days	☐	☐
☐	Set up reporting and agree the KPIs to track against the baseline	☐	☐

☐	Send the first report against the baseline	☐	☐
☐	Confirm communication cadence, channel, and response times in writing	☐	☐
☐	Hold the 30-day review (performance vs baseline, next-60-day plan, feedback)	☐	☐

Access Checklist

Request through a manager account (MCC) link to the client's OWN account. Never take passwords; never house the account in agency-owned property.

Done	Access	Notes
☐	Google Ads (via MCC link to client account)	[client-owned; use "change who pays" if migrating]
☐	Meta Business Manager / Ads	[partner access to client's business]
☐	Microsoft Ads	[if in scope]
☐	Google Analytics (GA4)	[property access]
☐	Google Tag Manager	[container access]
☐	Website / CMS (for tags, landing pages)	[where needed]
☐	Merchant Center / product feed	[for Shopping]
☐	Brand assets and guidelines	[logos, creative, tone]

Conversion Tracking Verification Checklist

Complete BEFORE launch. Launching on broken tracking makes Smart Bidding optimize toward the wrong signal.

Done	Check	Notes
☐	Google tag / GTM installed and firing on all pages	☐
☐	Primary conversions defined and categorized correctly	☐
☐	Secondary conversions set (not counted as primary)	☐

[]	Enhanced conversions enabled where relevant	[]
[]	Conversion values / currency correct (for ROAS)	[]
[]	Test conversion fires end-to-end (form / call / purchase)	[]
[]	Recorded conversions reflect real lead quality, not just form fills	[]
[]	GA4 and Ads conversions reconcile (no large undercount)	[]

Billing Ownership

Confirm and record before launch. The ad spend and the management fee are two separate pools.

Setting	Value
Who pays the ad spend	[the Client, directly to the platforms]
Payment method on the ad account	[client's own card / account]
Management fee billed by	[the Agency, separately]
Starting monthly ad budget	[Currency and amount]

Performance Baseline Snapshot

Record the starting numbers, with the date, so progress is measurable.

Metric	Baseline value	Date recorded
Cost per acquisition (CPA)	[]	[]
Return on ad spend (ROAS)	[]	[]
Conversion rate	[]	[]
Cost per click (CPC)	[]	[]
Monthly spend	[]	[]
Search impression share	[]	[]

PPC 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 business do, and who is your ideal customer?

2. What is your target over the next 90 days (target CPA, ROAS, lead volume, revenue)?
3. What is your monthly ad budget, and is it fixed or flexible?
4. Which locations or regions do you want to target?
5. What are your most important products or services to advertise?
6. Who are your main competitors, and what do you want to differentiate on?
7. What is your core offer and value proposition (what should the ads promise)?
8. Have you run paid ads before? What worked, what did not, and any account history we should know?
9. Who approves campaigns, budgets, and creative, and what is your turnaround?
10. What counts as a real lead for your sales team (so we track the right conversion)?

Sign-off

Onboarding completed by:	[PPC lead]
Conversion tracking verified on:	_____
Launch QA signed off on:	_____
30-day review held:	☐ Yes, 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.