

SEO 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 SEO client. Use the optional local-SEO block if the client is a local business.

Client: [Client Name] | **SEO lead:** [Name] | **Start date:** [Date] | **Scope:** [e.g. national organic / local SEO]

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, promises, scope)	☐	☐
☐	Confirm the signed contract and scope are on file	☐	☐
☐	Send the welcome email within one hour of signing	☐	☐
☐	Create the client workspace / portal	☐	☐
☐	Assign the team: day-to-day contact, SEO lead, escalation owner	☐	☐

Phase 2 — The First Week

Done	Task	Owner	Due
☐	Send the SEO onboarding questionnaire (see questions below)	☐	☐
☐	Request SEO access	☐	☐

	and credentials as one list (see Access Checklist)		
☐	Confirm all access received and working	☐	☐
☐	Run the technical SEO audit (indexation, crawl errors, speed, Core Web Vitals, mobile, redirects)	☐	☐
☐	Run the on-page and content audit (titles, meta, headings, internal links, content performance)	☐	☐
☐	Capture the performance baseline snapshot (see Baseline table)	☐	☐
☐	Build the keyword baseline (current positions for the target set)	☐	☐
☐	Build the competitor baseline (benchmark vs 2–3 real competitors)	☐	☐

Phase 2 — Optional Local-SEO Block

Done	Task	Owner	Due
☐	Google Business Profile audit (claim, verify, optimize each location)	☐	☐
☐	NAP and citation audit (name, address, phone consistent across directories)	☐	☐
☐	Review audit (rating and volume across Google and other platforms)	☐	☐

Phase 3 — The First 30 Days

Done	Task	Owner	Due
☐	Deliver the strategy roadmap (quick wins / incremental / long-term)	☐	☐
☐	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, measured against the baseline	☐	☐
☐	Confirm communication cadence, channel, and response times in writing	☐	☐
☐	Hold the 30-day check-in (progress vs baseline, next-60-day plan, feedback)	☐	☐

Access Checklist

Request only what the engagement needs. Tick what applies, then confirm each is received and working.

Done	Access / credential	Notes
☐	Google Search Console	[verify ownership / grant access]
☐	Google Analytics (GA4)	[property / data stream]
☐	Website / CMS admin access	[e.g. WordPress, Shopify, Webflow]
☐	Developer / hosting access	[where technical changes are needed]
☐	Google Business Profile	[for local work, each location]
☐	Existing SEO tools	[Ahrefs, Semrush, rank tracker]

[]	Bing Webmaster Tools	[optional]
[]	Brand assets and guidelines	[logos, tone, style]

Performance Baseline Snapshot

Record the starting numbers, with the date, so you can prove progress later. This is the step most onboarding templates skip.

Metric	Baseline value	Date recorded
Organic sessions (last 30 days)	[]	[]
Target keyword rankings (avg position)	[]	[]
Number of keywords ranking (top 10 / top 100)	[]	[]
Indexed pages	[]	[]
Core Web Vitals (pass / fail)	[]	[]
Domain / backlink metric	[]	[]
Referring domains	[]	[]
Organic conversions (where tracked)	[]	[]

SEO 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 are your top one to three SEO goals over the next 90 days (traffic, leads, specific rankings)?
3. What locations or regions do you want to rank in? (One location, national, international?)
4. What are your most important products or services to prioritize?
5. Who are your main search competitors, and which keywords do you want to compete on?
6. What keywords or search terms do you already have in mind?
7. Have you done SEO before? With whom, and did anything go wrong (penalties, bad links)?
8. Do you have brand guidelines, a content style, or existing content we should use? (Link them.)
9. Who approves content and on-site changes, and what is your turnaround for approvals?

10. What is your preferred communication channel and expected response time?

Sign-off

Onboarding completed by:	[SEO lead]
Baseline snapshot captured on:	_____
30-day check-in held:	☐ Yes, on _____

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