

SOCIAL MEDIA 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 social client.

Client: [Client Name] | **Account manager:** [Name] | **Start date:** [Date] | **Platforms:** [IG / FB / TikTok / LinkedIn / X]

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 message within one hour of signing	☐	☐
☐	Create the client workspace / portal	☐	☐
☐	Assign the team: day-to-day contact, content lead, community manager, escalation owner	☐	☐

Phase 2 — The First Week

Done	Task	Owner	Due
☐	Request social account access as one list (see Access	☐	☐

	Checklist)		
☐	Confirm all access received and working	☐	☐
☐	Send the social onboarding questionnaire (see questions below)	☐	☐
☐	Run the content-foundation session (voice, visual identity, pillars, do-not-post)	☐	☐
☐	Complete the Content Foundation worksheet (below)	☐	☐
☐	Run the competitor social audit (2–3 competitors)	☐	☐
☐	Set up the approval workflow (see Approval Workflow table)	☐	☐

Phase 3 — The First 30 Days

Done	Task	Owner	Due
☐	Build and get approval on the first content calendar (per platform)	☐	☐
☐	Deliver one quick win within the first ten days (sample posts / profile optimization)	☐	☐
☐	Agree reporting metrics and capture the engagement baseline (below)	☐	☐
☐	Send the first report against the baseline	☐	☐
☐	Confirm communication cadence, channel, and response times in writing	☐	☐
☐	Hold the 30-day	☐	☐

	check-in (performance vs baseline, next-60-day direction, feedback)		
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Access Checklist

Request through a business-manager tool where possible, not raw passwords. Tick what applies, then confirm each is granted and working.

Done	Access	Notes
[]	Meta Business Suite (Instagram + Facebook)	[partner/admin access]
[]	TikTok	[business account]
[]	LinkedIn Page	[admin access]
[]	X (Twitter)	[if in scope]
[]	Scheduling tool	[e.g. Sendible, Buffer, Later]
[]	Analytics / reporting tool	[if separate]
[]	Brand asset library	[logos, fonts, photos, templates]
[]	Any other platform	[Pinterest, YouTube, etc.]

Content Foundation Worksheet

Complete during the Phase 2 content-foundation session. This is what makes the first post safe.

Element	Notes
Brand voice (3–5 adjectives)	[e.g. warm, confident, playful]
Tone do's	[what the brand sounds like]
Tone don'ts	[what to avoid]
Content pillar 1	[theme + example]
Content pillar 2	[theme + example]
Content pillar 3	[theme + example]
Content pillar 4 (optional)	[theme + example]
Do-not-post list	[topics, competitors, claims, phrases to avoid]
Visual style	[colours, filters, layout rules]
Hashtag / tagging rules	[branded tags, partners to tag]

Approval Workflow

Agree and record before the first post. Nothing publishes without sign-off.

Setting	Value
Who approves on the client side	[named approver]
Approval turnaround	[e.g. within 24 / 48 hours of submission]
Channel approvals run through	[portal / shared board / email]
What happens if approval is late	[schedule shifts; agency does not publish unreviewed]
Who can approve in the approver's absence	[backup approver]

Engagement Baseline Snapshot

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

Platform	Followers	Avg engagement rate	Date recorded
Instagram	[]	[]	[]
Facebook	[]	[]	[]
TikTok	[]	[]	[]
LinkedIn	[]	[]	[]

Social 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 social goals over the next 90 days (awareness, engagement, leads, sales)?
3. How would you describe your brand's voice and personality in a few words?
4. What makes you different from your competitors, and who are those competitors on social?
5. Which platforms matter most to you, and are there any you want to drop or add?
6. What type of content does your audience respond to best (video, carousels, stories, reels)?
7. How often do you expect to post on each platform?
8. Are there topics, phrases, or competitors we should never mention?
9. Who approves content, and what is your expected turnaround for approvals?
10. What events, launches, or dates in the next 90 days should we plan around?

Sign-off

Onboarding completed by:	[Account manager]
Content foundation captured on:	_____
Approval workflow agreed on:	_____
30-day check-in 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.