

# Social Media Client Onboarding Template

A complete checklist for social media managers and agencies

## 01. Account Access Checklist

Collect all platform access before starting any work. Tick each item once confirmed.

- Instagram Business Account (Admin)
- Facebook Page (Admin)
- Facebook Ad Account (Admin access)
- LinkedIn Company Page (Admin)
- Twitter / X (Login credentials or manager access)
- TikTok (Login or Business Manager)
- Pinterest (if applicable)
- YouTube Channel (Manager access)
- Google Analytics / GA4
- Google Tag Manager (if applicable)
- Meta Pixel / tracking pixels
- Buffer / Hootsuite / scheduling tool

## 02. Brand Asset Collection

Gather all brand assets before creating a single piece of content.

Primary logo (SVG, PNG transparent, dark and light versions):

Secondary logo / wordmark:

Brand colour codes (HEX, RGB, CMYK):

Font names and weights:

Tone of voice (describe if no doc exists):

Brand dos and don'ts:

Content examples the client likes:

Competitor accounts the client dislikes:

Photography style guidelines:

### 03. Goals and KPIs

Align on what success looks like before month one begins.

Primary goal (brand awareness / leads / community growth / other):

Follower growth target per month (per platform):

Engagement rate benchmark:

Reach / impressions goal:

Key upcoming campaigns (product launches, events, seasonal):

Reporting cadence (weekly / bi-weekly / monthly):

Preferred reporting format (PDF / dashboard / portal):

### 04. Content Approval Workflow

Document the approval chain before any content goes live.

Primary approver (name + email):

Secondary approver if primary unavailable:

How content is submitted for review (portal / email / shared doc):

Turnaround time for approval (hours / days):

Number of revision rounds included:

Time-sensitive post protocol:

Blackout dates (no posting):

### 05. Reporting Preferences

Set reporting expectations upfront so delivery never comes as a surprise.

Report frequency:

Report delivery method (PDF email / live dashboard / client portal):

Platforms to include in report:

Metrics that matter most to the client:

Monthly review call (yes / no):

Preferred day and time for calls:

## 06. Communication and Response Rules

Agree on communication norms now to avoid confusion at 9pm on a Friday.

Preferred channel (Slack / email / client portal):

Client response time expectation (to agency):

Agency response time commitment (to client):

DM / comment types to escalate:

Escalation contact (name + phone):

Crisis protocol (negative post coverage):

Out-of-hours policy: