FREE AGENCY TOOLKIT · 2026 EDITION

The White-Label Agency Toolkit

Seven templates to hand HubSpot, Webflow and web work to a partner without losing quality, margin or your client.

01 Partner vetting scorecard

02 Project brief template

03 Partner onboarding checklist

04 SLA and communication framework

05 QA checklist before client handoff

06 Margin calculator worksheet

07 White-label agreement clause checklist

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How to use this toolkit

Use the templates in order the first time you work with a partner. After that, reuse sections 02, 05 and 06 on every project.

Stage	Template	Who owns it	Time needed
Before you sign	01 Vetting scorecard · 07 Agreement checklist	Agency founder or ops lead	2–3 hours per partner
Before kickoff	02 Project brief · 03 Onboarding checklist	Account or project manager	1–2 hours per project
During delivery	04 SLA and communication framework	Project manager + partner lead	Weekly 30-minute check-in
Before client sees it	05 QA checklist	Your QA owner (never the partner alone)	1–3 hours per deliverable
Quoting the client	06 Margin calculator	Founder or sales lead	15 minutes per quote

> **The golden rule of white-label delivery:** the client relationship, strategy and final sign-off stay with you. The partner owns execution. Every template here protects that line.

Why agencies use white-label partners

- [ ] Say yes to HubSpot, Webflow, Shopify and AI work you can't staff this month.
- [ ] Turn fixed salaries into variable cost that tracks your pipeline.
- [ ] Get team cover for holidays, sick days and spikes, not one freelancer.
- [ ] Keep 40–60% gross margin by selling outcomes, not reselling hours.

01 Partner vetting scorecard

Score each partner 1–5 on every line. Anything under 3 on a "must" row is a no, whatever the rate.

Criterion	Must / nice	How to check	Score 1–5
Platform work you can inspect (live HubSpot, Webflow or Shopify builds)	Must	Ask for 3 live URLs + a sample module or repo	
Relevant certifications (e.g. HubSpot CMS for Developers, Webflow Expert)	Must	Certificate links or partner directory profile	
Written QA process	Must	Ask to see their checklist, not describe it	
Time-zone overlap of 2–3+ hours a day	Must	Confirm named lead's working hours	
White-label hygiene (unbranded files, your tools, your email)	Must	Check a past deliverable for their branding	
NDA, no-poach and IP transfer accepted	Must	Send your agreement before the pilot	
Agency references (not end-client logos)	Must	Call 2 agencies; ask about a missed deadline	
Security posture (e.g. ISO 27001, access policy)	Nice	Certificates or a security summary	
Breadth: design, dev, QA, PM under one roof	Nice	Team page + who is on your account	
Transparent pricing and change-request rates	Must	Written rate card or fixed quote	
Paid pilot result (on time, on spec, revisions)	Must	Run one landing page or 2–3 modules first	

Partner name _____ Total score (out of 55) _____ Decision _____

02 Project brief template

Vague briefs are the most expensive mistake in white-label work. Fill in every line before you request a quote.

Project basics

Project name / internal code (no client name if sensitive)

Platform and tier (e.g. HubSpot Content Hub Pro, Webflow CMS)

Deliverable type (theme, pages, migration, integration, onboarding)

Target go-live date and fixed deadlines

Scope

Number of templates / pages / modules

Integrations and third-party tools

Content: who migrates, how many items

Explicitly out of scope

Assets and access

Design files (Figma link, version)

Brand guidelines, fonts, icons

Portal / site access method (your account, never the client's admin)

Acceptance criteria

Browsers and devices to test

Performance target (e.g. Lighthouse 90+ mobile)

Accessibility standard (e.g. WCAG 2.1 AA)

Revision rounds included

Single point of contact on your side

> **Test:** if a developer who has never met your client couldn't build it from this brief alone, it isn't finished.

03 Partner onboarding checklist

Complete once per partner, then review every quarter.

Legal and commercial

- [ ] Master services agreement signed
- [ ] NDA covering your clients and your pricing
- [ ] Non-solicitation of clients and staff (12–24 months)
- [ ] IP assignment on payment
- [ ] Rate card and change-request rate agreed
- [ ] Payment terms and invoicing contact

Accounts and tools

- [ ] Partner users created in your PM tool (named, not shared)
- [ ] Email aliases on your domain if they join client threads
- [ ] Shared Slack / Teams channel per project
- [ ] Code in your Git org; design in your Figma team
- [ ] Platform access via your partner account or sandbox

Brand and process

- [ ] White-label rules: no partner names in code, files or metadata
- [ ] Your naming conventions for modules, classes and assets
- [ ] Your QA checklist (section 05) shared and accepted
- [ ] Escalation path and backup contact
- [ ] Holiday calendar and working hours documented

Security

- [ ] Least-privilege access; no client admin passwords
- [ ] Password manager sharing only
- [ ] 2FA on every account
- [ ] Offboarding steps written down
- [ ] Data handling for client PII agreed

04 SLA and communication framework

Agree these numbers in writing. Adjust them to your clients' expectations, but never leave them blank.

Item	Suggested standard	Your agreed value
First response to a new request	Within 4 business hours	
Critical issue (site down, form broken)	Acknowledge in 1 hour; fix or workaround in 4 hours	
Standard ticket (small edit, new module)	2–3 business days	
Quote turnaround for scoped projects	24–48 hours	
Status update cadence	Written update twice a week; demo weekly	
Revision rounds	2 included per deliverable	
Overlap hours	At least 2–3 hours a day	
Missed milestone remedy	Recovery plan in 24 hours; fee credit if missed twice	

Weekly 30-minute partner check-in

1. Status per project: on track, at risk or blocked (5 min)
2. Demo of finished work (10 min)
3. Blockers and decisions needed from your side (10 min)
4. Next week's priorities and capacity (5 min)

> **Client-facing rule:** the partner never contacts your client directly unless you invite them, and then only from your domain and under your agency's name.

05 QA checklist before client handoff

Your own team runs this, even when the partner has done its QA. The client relationship is yours, so the last check is too.

Visual and responsive

- [ ] Matches design at 1440, 1024, 768 and 375 px
- [ ] Latest Chrome, Safari, Firefox and Edge
- [ ] Fonts, colours and spacing match brand guide
- [ ] No placeholder text or images
- [ ] Favicon and social share image set

Functional

- [ ] Every form submits and lands in the CRM correctly
- [ ] Thank-you pages, notifications and workflows fire
- [ ] All links work; no links to staging
- [ ] Modules editable by a marketer without code
- [ ] Integrations tested with real data

SEO and AEO

- [ ] Unique title (≤60 chars) and meta description (≤155)
- [ ] One H1; question-style H2s where relevant
- [ ] Alt text on every meaningful image
- [ ] Schema: Organization, Article/FAQ, Breadcrumb
- [ ] 301 redirects mapped for every changed URL
- [ ] XML sitemap and robots.txt checked

Performance and accessibility

- [ ] Lighthouse mobile performance 90+
- [ ] Images compressed (WebP/AVIF)
- [ ] Colour contrast passes WCAG AA
- [ ] Keyboard navigation works
- [ ] No partner branding anywhere in source

06 Margin calculator worksheet

Price the outcome so you hit your target margin even after management time and changes.

Line	Formula	Worked example	Your project
A. Partner quote	Hours × partner rate	160 h × $40 = $6,400	
B. Your internal time	PM + QA hours × loaded cost	20 h × $75 = $1,500	
C. Change buffer	A × 10–20%	15% = $960	
D. Tools and licences	Plugins, fonts, apps	$0	
E. Total cost	A + B + C + D	**$8,860**	
F. Target margin	Your goal	50%	
G. Client price	E ÷ (1 − F)	**$17,720**	
H. Gross profit	G − E	$8,860	

Quick reference: price needed for each margin

Total cost (E)	40% margin	50% margin	60% margin
$2,000	$3,333	$4,000	$5,000
$5,000	$8,333	$10,000	$12,500
$10,000	$16,667	$20,000	$25,000
$20,000	$33,333	$40,000	$50,000

Never resell hours one-to-one. Markup is not margin: a 50% markup on cost is only a 33% margin. Always divide by (1 − margin).

07 White-label agreement clause checklist

Make sure your partner agreement covers each point. This is a checklist, not legal advice; have your lawyer review the final contract.

Clause	What it should say	✓
Confidentiality (NDA)	Covers client identities, data, your pricing and processes; survives termination	
Non-solicitation of clients	Partner may not pitch or accept work from your clients directly for 12–24 months	
Non-solicitation of staff	Neither side hires the other's team members during the term + 12 months	
White-label / branding	No partner names, logos or credits in deliverables, code, metadata or portfolios without written consent	
IP ownership	All work transfers to you (or your client) on payment; partner keeps only pre-existing tools	
Service levels	Response times, delivery milestones and remedies from section 04	
Change requests	How changes are quoted, approved and billed	
Data protection	GDPR/CCPA roles, access limits, breach notification within 72 hours	
Warranty and fixes	Bug-fix window after delivery (e.g. 30 days) at no cost	
Liability and insurance	Caps, indemnities and professional indemnity cover	
Termination and handover	Notice period; full handover of code, docs and access	

YOUR WHITE-LABEL PARTNER

Need a partner that already works this way?

Inbound WebHub has delivered 1,100+ projects since 2017, including unbranded delivery for agencies across the US, UK, Europe and Australia. 30+ certified specialists across HubSpot, Webflow, Shopify, WordPress, AI automation and AEO.

Fixed-scope quotes in 24 hours · NDA and no-poach as standard · ISO 27001 and CMMI Level 3

Send us a brief → inboundwebhub.com/contact-us

Further reading: White Label HubSpot Pricing: What Agencies Pay in 2026 · White Label HubSpot Agency: How Partners Scale Without Hiring · White Label AEO Services. All at inboundwebhub.com/blog

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