Reply

Client Onboarding Checklist & Questionnaire for Agencies

Customer onboarding sets the foundation for a successful and long-lasting relationship between lead generation agencies and their clients. Make it smooth and effective with a ready-to-use checklist (+questionnaire) based on the hands-on expertise of established agencies, including **Belkins, Respect.Studio,** and **Omniscient Digital.**

Client onboarding checklist for agencies

- [ ] **Send onboarding email + questionnaire (see below)**
  Alternatively, you can have an interview call with the client to figure out all the details about their business and expectations for the project.

- [ ] **Book an onboarding call with the client**
  Make sure all involved parties accept the calendar invite.

- [ ] **Onboarding call preparations (internal):**
  - [ ] Questionnaire/interview analysis
  - [ ] ICP research
  - [ ] Team strategy call

  Adjust the ICP based on your research or assumptions. Put together a project deck with the high-level strategy and objectives to communicate your strategy to the client.

- [ ] **Hold an onboarding call with the client**
  Present your strategy to the client and figure out everything you need to kick off the project. It's important to have everyone involved to attend the call.

- [ ] **Call recap and analysis (internal)**
  Make sure all of your team members are on the same page and well-informed about the project's strategy, goals, and challenges.

- [ ] **Assign tasks to the team**
  Don't forget to set the deadlines and tie the goals to the tasks.

- [ ] **Project setup**
  - [ ] Purchase domain/mailboxes (+ start warm-up) and phone numbers (if needed)
  - [ ] Tech stack setup (CRM, sales engagement, automation tools, etc.)
  - [ ] Collect the first batch of leads
  - [ ] Create the sample templates
  - [ ] Develop the overall sequence flow

  Provide the client's team with access rights to your stack for monitoring and reporting.

- [ ] **Send the leads and templates for review**
  Make sure to get the client's feedback and approval before you launch and ramp up your efforts.

- [ ] **Set up and launch the sequences**
  Make adjustments based on the feedback provided by the client (if any).

- [ ] **Project kick-off (email)**
  Notify the client about the official project kick-off while providing more info about the next steps and timeline.

Onboarding questionnaire for agency clients

1. Who will be the key point of contact for this project? Please, list everyone involved along with their roles and contact information.

2. Do you have any strategic (short or long-time) goals?

3. What are you already doing or planning to do to achieve them?

4. What is the purpose of your service/product? If you could choose only ONE thing to differentiate your product/service from the competition, what would that be?

5. How does your service/product make clients' lives better? Share 2-3 examples of how it has impacted customer goals (case studies).

6. What is your target audience/ICP or buyer personas? How many stakeholders are usually involved in the buying process?

7. What is the typical buyer's journey for your service/product? Please, list the key touchpoints within the sales cycle.

8. What is the typical size of deal/sale for your service/product?

9. What are the most common objections that you face? How do you usually address these objections?

10. What are the objectives/expectations for you to consider this project a success?

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