The ultimate agency checklist

Description

Running an agency is exciting, but let’s face it—it’s also complex. From client onboarding to project delivery and team management, there are countless moving parts. Whether you’re just getting started or looking to scale, this ultimate agency checklist will help you stay on track, stay organized, and grow confidently.

Let’s break it down step by step.

1. Build a Solid Foundation

Before you take on your first client, get the basics in place. A strong foundation helps you look professional and operate legally.

Checklist:

- Define your niche and services
- Register your business and secure a domain name
- Write a business plan
- Set up branded email and social profiles
- Build a professional website
- Create branded templates (contracts, invoices, proposals)
- Open a business bank account
- Set up basic accounting software
- Ensure you have relevant business insurance

2. Organize Your Operations

Clear processes lead to smoother projects. Organizing your internal systems makes collaboration easier, especially as your team grows.

Checklist:

- Define team roles and responsibilities
- Use a project management tool (like Asana or ClickUp)
- Document your workflows and SOPs
- Use a communication platform (Slack, Teams, etc.)
- Implement time-tracking tools (e.g., Harvest, Toggl)
- Create onboarding systems for new team members
- Backup important data and ensure GDPR compliance
- Set up performance reviews and feedback cycles

3. Set Up a Strong Client Onboarding Process

Your first impression matters. A structured onboarding process shows professionalism and builds trust.

Checklist:

- Create a client intake form or questionnaire
- Develop a clear discovery call template
- Prepare reusable proposals and pitch decks
- Finalize contract templates (NDA, service agreements)
- Use onboarding checklists or email flows
- Set up new client projects in your PM tool
- Assign tasks and team roles right away
- Schedule and run an effective kickoff meeting

4. Streamline Your Client Workflow

Happy clients come from reliable, transparent workflows. Deliver consistently with a process that keeps everyone in sync.

Checklist:

- Define deliverables and timelines up front
- Use templates for reports, strategies, and audits
- Create a clear review and approval process
- Schedule regular check-ins and status updates
- Track KPIs and milestones
- Use tools for feedback and collaboration (like Loom or Frame.io)
- Share monthly or quarterly performance reports
- Request testimonials or case study permissions

5. Get Serious About Marketing and Sales

Marketing your agency shouldn’t come last. Consistent outreach helps you attract the right leads and scale your impact.

Checklist:

- Launch a clear, SEO-optimized website
- Write blog content that highlights your expertise
- Set up lead capture and email automation
- Create a polished pitch deck and brochures
- Plan outbound marketing (cold email, LinkedIn, etc.)
- List your agency on directories (Clutch, Upwork, etc.)
- Set up and optimize Google My Business

- Use a CRM to track leads and follow-ups
- Test retargeting and paid campaigns
- Encourage client referrals and partnerships

6. Stay on Top of Finances and Legal

Money matters. Protect your cash flow and business by staying financially organized and legally compliant.

Checklist:

- Track income, expenses, and profitability
- Create pricing packages or retainer options
- Automate invoicing and reminders
- Set up recurring billing when possible
- Review monthly financial reports (P&L, cash flow)
- Track time vs. budget for each project
- Set aside taxes regularly
- Review and update contracts annually

7. Invest in Growth and Innovation

The best agencies evolve. Stay ahead of the curve by learning, testing, and innovating regularly.

Checklist:

- Follow trends in your industry
- Conduct a quarterly SWOT analysis
- Train your team and invest in certifications
- Experiment with new tools, services, or products
- Build internal tools, templates, or systems
- Join networking groups or attend events
- Explore partnerships or new collaborations
- Gather client feedback to improve service

8. Focus on Client Retention and Success

Long-term clients = long-term success. Don’t just deliver; build relationships that last.

Checklist:

- Send onboarding and post-project surveys
- Measure client satisfaction (NPS or similar)
- Offer upsells and added-value services
- Send educational emails and helpful updates
- Celebrate key milestones or project wins

- Hold quarterly business reviews
- Provide loyalty rewards or discounts
- Build a private client community or group

Final Thoughts

Running a successful agency is part strategy, part systems, and a lot of heart. This checklist won't do the work for you, but it'll help you build an agency that's scalable, sustainable, and client-focused.

Use it as your blueprint, and feel free to adapt it to your agency's unique needs—whether you're focused on SEO, design, content, ads, or full-service digital solutions.

- Download the agency checklist in excel version here

Category

1. Freelancing

Date
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Author
huubster