

CLIENT ONBOARDING CHECKLIST

Everything we ask before starting your **social media**

This is the exact list we go through with every new Local Boost client before the first shoot. Get these ready and your first month of content starts faster.

1 Your business

- ☐ Name, address, phone and hours (the same ones on Google)
- ☐ Services and prices
- ☐ Best sellers, and what you want to sell more of
- ☐ What makes you different from the place down the street

3 Your ideal customer

- ☐ Who they are: age, area, what they care about
- ☐ The language they speak (English, Spanish or both)
- ☐ The questions they ask you most

5 Account access

- ☐ Instagram and Facebook (through Meta Business Suite)
- ☐ Google Business Profile
- ☐ Meta and Google ad accounts, with a payment method
- ☐ Your monthly ad budget

7 Shoot day

- ☐ A 3-hour window when the business looks its best
- ☐ Who will be on camera

2 Your goals

- ☐ What you want in the next 90 days: calls, bookings, walk-ins
- ☐ Promos, launches or events coming up
- ☐ Your busy and slow seasons

4 Your brand kit

- ☐ Logo files (PNG or SVG)
- ☐ Brand colors and fonts
- ☐ Photos and videos you already have
- ☐ 2 or 3 accounts whose style you like

6 The rules

- ☐ Anything you'd never want posted
- ☐ Topics, words or competitors to avoid
- ☐ People who can't appear on camera
- ☐ Who approves the content

- ☐ The services and products to show
- ☐ A signed photo release from any client who appears

Ad budget: you pay Meta and Google directly, so you always see exactly where your money goes. Our Local Boost plan is \$797/month, with no contract.