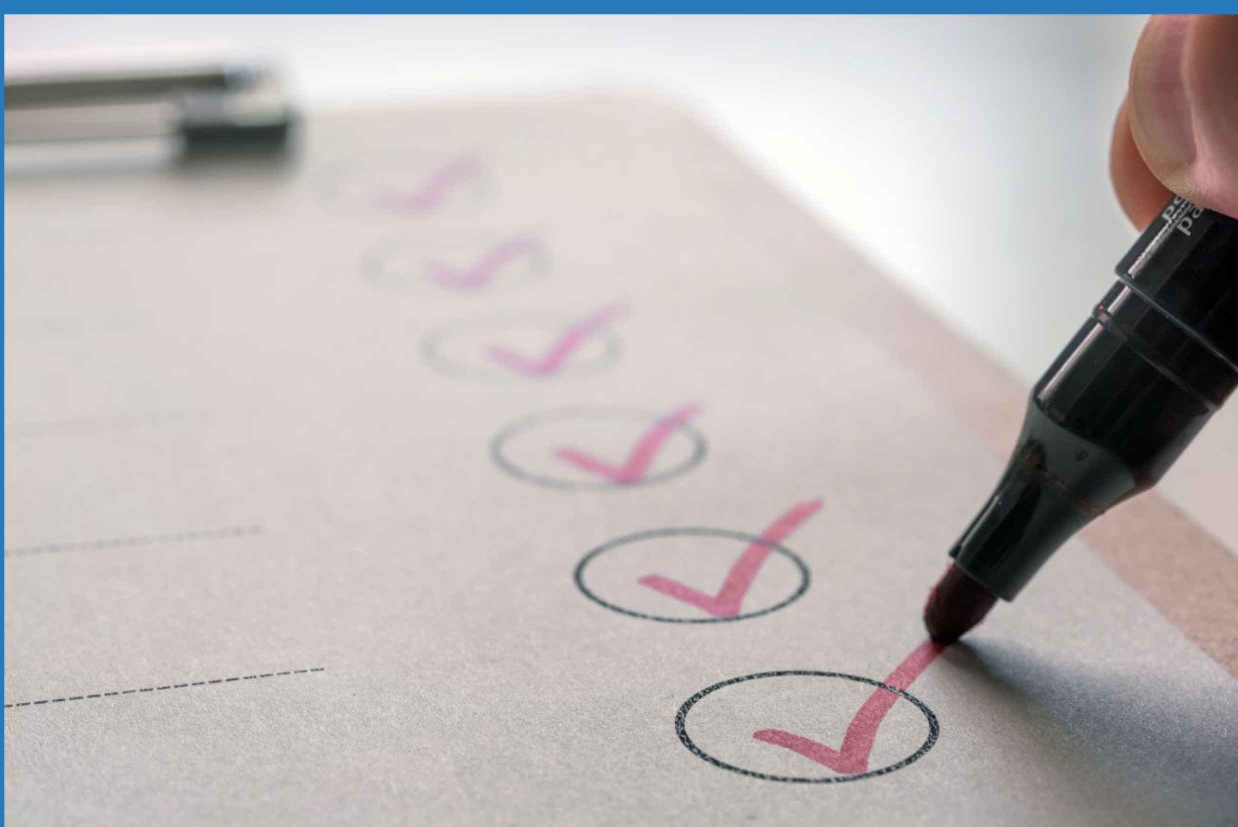
Marketing Partnership Kick-Off Meeting Checklist

For small business owners working with a freelancer, consultant, or agency.



Checklist Item	Notes / Answers
Before the Meeting	
What are your main business goals? (e.g. more sales, more bookings, more local customers)	
What are your biggest challenges? (low website traffic, not enough leads, social media not working)	
Who are your main competitors?	
What do you think your main competitors do better/ worse than you?	
Did you gather all the useful materials? (menus, brochures, flyers, price lists, old marketing materials)	
Access & Information	
Website CMS logins (WordPress, Wix, Shopify, etc.)	
Hosting provider and domain registrar details	
Social media accounts (Facebook, Instagram, LinkedIn, TikTok, X)	
Paid ad accounts (Google Ads, Meta Ads, LinkedIn Ads, TikTok Ads)	
Google Analytics / GA4 access	
Google Search Console access	
Google Tag Manager (if used)	
Email marketing platform (Mailchimp, HubSpot, etc.)	
Brand assets (logos, colours, fonts, style guide)	
Image/video library (photos, product shots, reels, adverts)	
Customer or buyer insights (personas, audience profiles, customer lists)	
Past campaign reports or analytics from freelancers/agencies	

Define Success	
Agree on your main business goals (sales, enquiries, visits, repeat customers, brand awareness)	
Translate goals into numbers (e.g. 20 new enquiries per month, +10% repeat customers, 500 extra website visits)	
Decide which KPIs will be tracked (calls, form fills, conversions, traffic, rankings)	
Agree on what early progress indicators will be tracked (engagement, enquiry quality, rankings)	
Confirm how often results will be reviewed (weekly, monthly, quarterly)	
Budget & Timeline	
Agree what is included in the agreed fee (ads, campaigns, posts, reports, meetings)	
Confirm what counts as extra work (last-minute campaigns, urgent requests, new formats)	
Agree on process for handling new requests (small changes vs. new projects)	
Discuss realistic timelines for each channel (PPC = fast, SEO = months, social = ongoing)	
Note seasonal factors (busy months, quiet periods, industry cycles)	
Clarify payment terms (monthly retainer, project fee, invoicing dates)	
Clarify invoicing method (email invoices, direct debit, online payment)	
Communication & Involvement	
Decide how often you'll get updates (weekly call, monthly report, quarterly review)	
Agree on the main channel (email, phone, project tool, messaging app)	
Confirm the main contact person if you will work with an agency	
Decide your level of involvement (approve every post vs just the strategy)	
Confirm the approval process (who gives the green light and how much time they need)	

Discuss how feedback should be given (strategic, with context, not just personal preferences)	
Agree on response time for approvals and feedback.	
Agree on what happens if you're unavailable (delegate or pause approvals)	
Risks & Expectations	
Discuss what happens if work is delayed (holidays, illness, technical issues)	
Agree how urgent requests will be handled (seasonal promos, last-minute campaigns)	
Decide what to do if extra costs appear (get approval first, pause until agreed)	
Collaboration Tools	
Agree where files will be shared (Google Drive, Dropbox, OneDrive)	
Decide whether you'll use a project tool (Trello, Asana, Slack) or just email	
Confirm where reports will be stored for easy access	
Legal & Admin	
Confirm ownership of your website, content created, ad accounts, and customer data remains with you.	
Confirm confidentiality (your business information stays private)	
Confirm how customer and business data will be stored, used, and kept GDPR compliant	
Review the contract to ensure these points are included	
Sign the contract	
Before You Finish the Meeting	
Agree who will send a written summary of decisions and action items	
Confirm deadlines for the first tasks	
Schedule the first progress review call or meeting	