Agency Checklist

# Gather Basic Client Information

Business Name

Business Telephone

Contact Person Name

Contact Telephone Number

Contact Email Address

Customer Facing Email Addresses (Support/sales/info)

Website URL

# Client Account Access

Gather service-related accounts

Arrange for access grant to accounts

Google

Facebook

Other Social

Other Accounts

# Reseller Account Management

Ensure reseller accounts created and fees paid

Record Account Manager Contact Information

Record Account Manager Info

Plan for weekly or bi-weekly meetings with Account Manager as required