



TEXT MARKETING

Client Onboarding Checklist

Move a signed client into an organized, compliant, launch-ready workflow.

HOW TO USE THIS CHECKLIST

Duplicate one copy for each client. Assign an owner, record decisions as they are made, and do not mark onboarding complete until every launch-critical item is verified.

CLIENT AND COMMERCIAL SNAPSHOT

CLIENT BUSINESS

[Business Name]

PRIMARY CONTACT

[Name / Email / Phone]

SELECTED PACKAGE

[Package]

MONTHLY FEE

\$(Amount)

MONTHLY TEXT ALLOWANCE

[Allowance]

CAMPAIGN ALLOWANCE

[Allowance]

EFFECTIVE DATE

[Date]

BILLING DATE

[Date]

1. COMMERCIAL HANDOFF

- ☐ Signed service agreement received.
- ☐ Secure payment method or billing process completed.
- ☐ Setup fee and first invoice handled as agreed.
- ☐ Package, included services, and allowances confirmed.
- ☐ Additional usage and out-of-scope pricing confirmed.
- ☐ 30-day cancellation process explained.
- ☐ Client and provider notice emails recorded.
- ☐ Internal onboarding owner assigned.

2. DISCOVERY-TO-ONBOARDING HANDOFF

- ☐ Primary business priority documented.
- ☐ Desired customer action and outcome documented.
- ☐ Likely campaign opportunities transferred from discovery.
- ☐ Seasonal dates, slower periods, launches, or events noted.
- ☐ Known constraints, sensitivities, and exclusions recorded.
- ☐ First-campaign recommendation identified.

Subscriber List and Account Setup

Confirm the existing list, establish account access, and prepare the sending process.

3. BUSINESS AND BRAND INFORMATION

- ☐ Legal business name, public-facing name, and address confirmed.
- ☐ Website and primary customer-facing links collected.
- ☐ Business hours, service area, and primary location confirmed.
- ☐ Company logo and brand colors collected (when applicable).
- ☐ Brand voice, preferred wording, and prohibited wording documented.
- ☐ Primary offers, products, services, and customer segments understood.
- ☐ Authorized campaign approver identified.
- ☐ Escalation contact identified for urgent questions.

4. EXISTING SUBSCRIBER LIST AND PERMISSION

- ☐ Existing subscriber list received securely.
- ☐ Client confirmed that subscribers gave permission to receive marketing texts.
- ☐ How and where the list was collected is recorded at a practical level.
- ☐ Current list size and file format are confirmed.
- ☐ Client understands that purchased, rented, scraped, or unsolicited lists are not acceptable.
- ☐ Any opt-outs recorded before the list transfer have been identified by the client.
- ☐ Client ownership of the Subscriber Database is confirmed.
- ☐ Database export process is understood.

5. EXISTING PROGRAM SNAPSHOT

CURRENT OR PREVIOUS PLATFORM

[Platform]

CURRENT SENDING NUMBER

[Number]

SUBSCRIBER COUNT RECEIVED

[Count]

EXISTING KEYWORD, IF ANY

[Keyword]

6. PLATFORM AND SENDING SETUP

- ☐ Client account or workspace created.
- ☐ Sending number, sender identity, or messaging profile assigned.
- ☐ Required business or campaign registration submitted and approved, as applicable.
- ☐ Keyword and automated response configured.
- ☐ Subscriber list imported or collection method activated.
- ☐ Opt-out and HELP behavior tested.
- ☐ Client access level and provider access level confirmed.
- ☐ Account naming, locations, and internal notes standardized.

LAUNCH CHECKPOINT

Do not schedule the first campaign until the list has been received, the client has confirmed subscriber permission, any historical opt-outs have been identified, and the sending setup has been tested.

First Campaign and Launch Readiness

Turn onboarding decisions into an approved campaign and a repeatable monthly process.

7. FIRST CAMPAIGN BRIEF

CAMPAIGN OBJECTIVE

[Objective]

AUDIENCE

[Segment / All eligible subscribers]

REQUESTED SEND DATE AND TIME

[Date / Time / Time Zone]

OFFER OR MESSAGE

[Promotion, reminder, update, event, or other message]

CALL TO ACTION

[CTA / Phone / Reply instruction]

RESTRICTIONS AND EXPIRATION

[Dates, exclusions, inventory, location, or redemption terms]

8. CAMPAIGN REVIEW AND APPROVAL

- | | |
|--|---|
| ☐ Complete campaign details received at least 24 business hours before the requested send time. | ☐ Test message sent and reviewed on a mobile device. |
| ☐ Offer, dates, pricing, links, spelling, and restrictions verified. | ☐ Authorized client contact provided final written approval. |
| ☐ Required disclosures and opt-out language reviewed. | ☐ Campaign is scheduled for the correct audience, date, time, and time zone. |
| ☐ Estimated text usage is within the package allowance or overage is approved. | ☐ Final campaign record and approval are retained. |

9. ONGOING WORKING PROCESS

- | | |
|---|---|
| ☐ Normal campaign request method confirmed. | ☐ Monthly planning rhythm or campaign cadence established. |
| ☐ 24-business-hour minimum notice explained. | ☐ Usage and additional-location pricing understood. |
| ☐ Rush requests, revision limits, and out-of-scope work explained. | ☐ Client responsibilities for offers, approvals, and subscriber permission understood. |
| ☐ Support channel and business hours confirmed. | ☐ No specific marketing result or carrier delivery has been guaranteed. |

10. LAUNCH SIGN-OFF

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|---|--|
| ☐ Commercial setup complete. | ☐ First campaign approved and scheduled. |
| ☐ Subscriber list and permission check complete. | ☐ Ongoing workflow confirmed with client. |
| ☐ Platform setup and testing complete. | ☐ Onboarding marked complete internally. |

ONBOARDING COMPLETED BY

[Name]

COMPLETION DATE

[Date]