

# happy monday

## Client-Agency Collaboration Checklist

**Maximise Efficiency, Save Time, and Build a Thriving Partnership**

Use this checklist to ensure smooth collaboration with your digital agency.

### **Pre-Project Prep**

- ☐ Share your vision: Brand guidelines, mission, competitor insights.
- ☐ Define goals: Website purpose (leads, sales, awareness).
- ☐ Assign a project lead: Lead communication & training.
- ☐ Gather assets: Logos, images, fonts, content.

### **Project Kick-off**

- ☐ Set clear timelines: Define milestones & deadlines.
- ☐ Discuss budgets: Be upfront to avoid scope creep.
- ☐ Choose communication tools: Slack, Zoom, Email, etc.
- ☐ Ask questions: Clarify anything unclear.

### **Training & Knowledge Transfer**

- ☐ Schedule training: CMS, SEO, analytics.
- ☐ Assign a note-taker: Document or record sessions.
- ☐ Practice skills post-training: Test within 48 hours.
- ☐ Save login credentials: Store securely (e.g. LastPass).

### **Content & Website Management**

- ☐ Review content early: Avoid last-minute changes.
- ☐ Use SEO best practices: Meta tags, alt text, etc.
- ☐ Plan for updates: Blogs, events, editable content.
- ☐ Bookmark tools: Google Analytics, Search Console, website login screen.

### **Communication Best Practices**

- ☐ Provide specific feedback: Be clear and detailed.
- ☐ Consolidate feedback from your team: Avoid conflicting input.
- ☐ Schedule check-ins: Weekly or biweekly.
- ☐ Flag issues early: Don't delay concerns as this can cause rework.

## **Long-Term Partnership**

- ☐ Schedule quarterly reviews: Goals, performance.
- ☐ Stay curious: Ask about trends & innovations.
- ☐ Celebrate wins: Share your successes!

## **Post-Launch & Beyond**

- ☐ Test everything: Links, forms, mobile view.
- ☐ Backup regularly: Ask your agency how.
- ☐ Monitor security: Updates, plugins, passwords.

## **Bonus Tip**

Keep communication open!  
The best partnerships thrive on honesty and shared enthusiasm.

- ☒ Download & print this checklist before starting your next digital project.

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