



What to Expect During Agency Onboarding

**A step-by-step overview to the
marketing agency onboarding process.**

Switching to a new digital marketing agency can seem ... complicated. What should you expect throughout the process? What does your team need to bring to the table to smooth the transition? And what the heck is going to happen to your existing campaigns, conversion rates, and rankings?

All good questions.

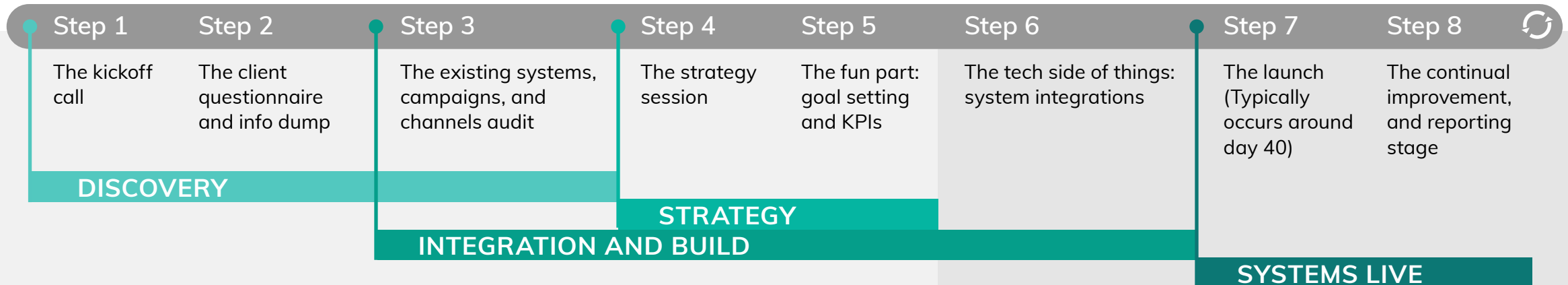
You ask them because no business has time for steps in the wrong direction, and we get that. Having been through the process a time or two (this morning!), we've put together a quick guide to help you navigate the agency onboarding process. Whether you're starting your digital marketing program from the ground up, or shedding an old agency that wasn't quite up to snuff, this guide will give you all you need to know about what to expect, what to avoid, and what perceived nightmares of high-effort onboarding processes you can finally put to rest.

It's not that bad, we promise (at least it doesn't have to be).

What is the Agency Onboarding Process Flow?

Disclaimer alert: the timelines, expectations, and outcomes of any agency onboarding process will vary. Every company and marketing team is different. You may have elaborate campaigns running while others are starting at square one. That being said, understanding each part of agency onboarding will help the two parties move through each step as efficiently as possible.

So, we've broken things down into a simple (and rather common) timeframe: 90 days. After you've reviewed the proposals, selected your new agency, and signed the contract, here's what you can expect during a typical 90-day agency onboarding.



The first 30 days are the most important. We'll assess your current digital marketing program, develop your new strategy, and build your campaigns.

By day 31, the strategy has been approved and integrations are complete. Now, the campaigns will be built.

How You Can Help Keep Things Moving

It takes two to do the digital marketing agency tango. Many clients we work with ask, what can we do on our end to ensure the onboarding process goes smoothly? Great question! We'll provide you with a detailed checklist of items to review and complete. All of the items on the checklist are usually tied to one of the major steps in the agency onboarding process. **In the next section, we outline what happens at each step and what we need from you.**





STEP

1

The kickoff call

Hi, hello, it's nice to meet you.

This first call is a chance for all primary stakeholders on each side of the table to get acquainted with who they'll be working with and set expectations around communication. It's also a good time for the agency to layout each step in the onboarding process, answer questions, and lay the groundwork for the next step so that everyone is on the same page.

Who Should Be There?

Client side:

CMO

Director of Marketing

Digital Marketing Manager

PPC and SEO Specialists

Agency side:

Your Account Executive

Erica Tykal, Senior Director of Client Services

Lauren Leone, VP of Client Services

Alex Membrillo, CEO

STEP 2

The client questionnaire & information dump

No, we won't ask you for your social security numbers or marital status (phew!). But we will want to get as much detail as possible around your existing marketing stack, strategy, team dynamics, goals, objectives, and any important documents that might be of use.

The questionnaire helps grease the wheels—the more time and attention you spend on it, the faster your new marketing team will be able to deliver value.

Onboarding Questionnaire:

Here's a sample of the questions we'll ask you. Your account executive will send you the complete questionnaire.

- What does success look like for you?
- What specific challenges does your business face?
- Why are you seeking a new partner?
- What goals did you give your existing partner and do you feel they are hitting them?
- Is there a KPI(s) that we should be looking for when we audit your campaigns?

Information Dump:

Before we can get started, we need to know everything we can about your existing marketing program. Please send Cardinal relevant:

- Strategic plans and business objectives
- Priority locations, if they exist
- Market research
- Value propositions
- Buyer persona research
- Brand identity guidelines
- Historical reports for programmatic display, SEO, PPC, etc.



STEP 3

The existing systems, campaigns, and channels audit

Sounds scary, but it's really not. This is the part where we do a deep dive into everything that comprises your current marketing program. We'll make note of your tech stack, APIs, internal systems, and mix of marketing channels. We'll also take a close look at your existing campaigns, including their performance. This is a crucial step, as it's an opportunity not only to see what you have and what's working, but what you don't yet have and what you need to get results.

As soon as the audit is complete, we'll provide you with recommendations for your existing campaigns. We'll also assume management of them and make sure they continue to deliver a steady flow of leads throughout the onboarding process.

Simultaneous campaign management and development before sunsetting

In some instances, we can optimize your campaigns and provide you with some quick wins by pausing keywords that haven't converted in the past 6 months, removing broad match terms, or by activating basic ad extensions.

But most often, we'll recommend that you retire your old campaigns. Don't worry. This transition is carefully timed so that you don't experience a dip in leads.

STEP

4

The strategy session

This is when we lock ourselves in a room for a day or two and really get our hands dirty. The goal of discovery and strategy building is to not only identify the quantifiable metrics that you want to achieve (something that's REALLY important to us) but to begin strategizing, specifically, around how we plan to get there.

Strategy Session Outcomes

By day 30—and often much earlier—you'll receive our SEO and PPC audits, our recommendations for existing campaigns, and your digital marketing strategy.

Upon your review and approval, we'll begin building your campaigns and will be ready to launch as we move into the second month of our partnership.

STEP 5

The fun part: goal setting and KPIs

Again, any digital marketing agency worth its salt is going to be highly focused on measurable outcomes. What short term and long-term goals do you want to achieve, and what KPIs will we use to measure their success? Just as important, how do these goals and KPIs tie into broader organizational objectives? Are you focused on building brand awareness? Driving leads? Both?

We'll Review Previous Goals and Results:

If you haven't yet, please share:

- Existing business and marketing goals and KPIs
- Historical data and reports

Potential KPIs We Can Report On:

We'll identify the KPIs that are meaningful to your company and are true indicators of success. This may include:

- Number of Leads
- Conversion Rate
- Cost Per Lead
- Patient Acquisition Cost (PAC)
- Customer Lifetime Value (CLV)

STEP 6

The tech side of things: system integrations

You have existing systems and technology, and so too will your digital marketing agency. At this important step, we'll work together to make sure everything is integrated properly and the right people have access to the right tools. This ensures that we can execute on our strategy and accurately monitor and report on performance.

Marketing Technology Stack Access:

We'll need you to grant us access or create login credentials for some of the following systems:

- Website CMS
- Google properties (Analytics, Tag Manager, Webmaster Tools, Search Console, AdWords, etc.)
- Email service provider (MailChimp, Constant Contact, ConvertKit, Drip, etc.)
- Marketing automation software (HubSpot, Marketo, Pardot, etc.)
- Social media accounts and ad managers (Facebook, Twitter, LinkedIn)
- Call Booking Software (CallRail)
- CRM
- EHR

We may need to coordinate with your vendors, like website developer or CRM provider. We'll let you know if we need to talk with anyone to ensure a successful integration.

STEP 7

The launch (go time!)

The audit is complete, all systems are integrated, and the strategy has been approved. Now is the moment you've been waiting for: it's time to launch all the campaigns!

Your new campaigns are typically launched around day 31 to 40.



STEP 8

The monitoring, continual improvement, and reporting stage

Launching campaigns is good, but it's just the first step. Continual improvement is an essential element of successful digital marketing programs. We don't just set it and forget it. We closely monitor your campaign's performance, communicate updates, and adjust campaigns to ensure we meet your strategic objectives.

This doesn't just happen once or twice; it's an integral part of our process and will continue throughout our partnership.

Not only do we closely monitor your campaigns, we keep a close eye on the ever-changing digital marketing world. We rapidly respond to Google algorithm updates and digital media trends and ensure your campaigns adhere to best practices and continue to produce results.

Campaign Review and Optimization

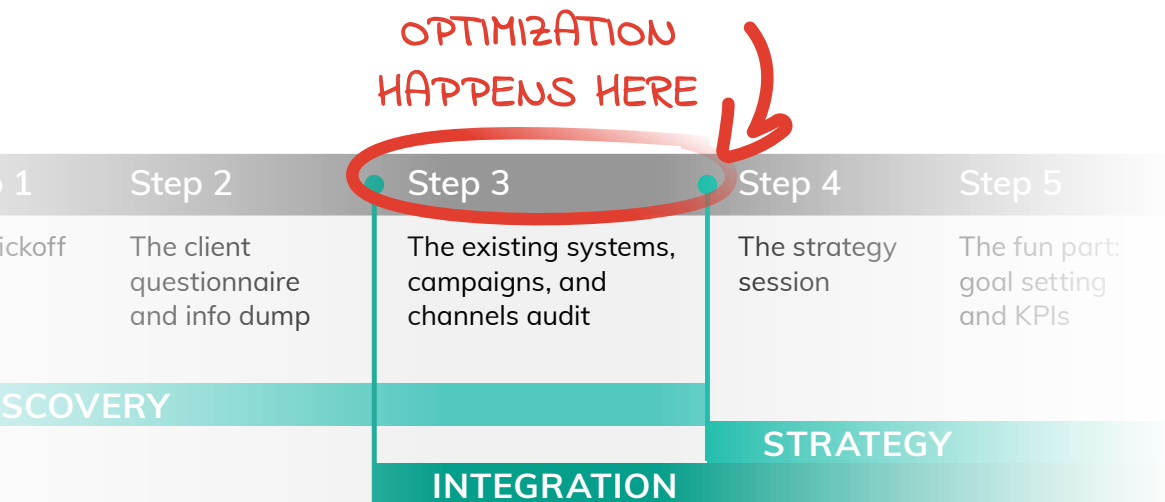
Cardinal will deliver campaign updates at regular intervals. Based on your service level agreement (SLA), you can expect:

- Weekly campaign updates
- Monthly reports
- Quarterly strategy review sessions
- Quarterly strategy plans

If at any time you feel things aren't working or if you want to discuss a new approach, you can reach out to your Account Executive.

Wait, Wait – What Will Happen To My Existing Campaigns?!

A good digital marketing agency isn't necessarily going to come in and blow everything up. Why change or get rid of something that's delivering favorable outcomes? Yet, you wouldn't be contracting with a new digital marketing agency if your campaigns were meeting expectations.



Our approach to your existing campaigns is as follows:

Assess

Before we can make any decisions, we need to thoroughly evaluate your existing campaigns, their objectives, and how they're performing. At this point, we'll decide to either optimize existing campaigns or to sunset them. If we decide to sunset some of the campaigns, it will be carefully timed to avoid any disruption to your lead flow.

Refine, retool, restructure

If we've determined that some of the campaigns are meeting your goals, we'll then identify ways to optimize them and improve things like conversion rates. These campaigns will continue to run during onboarding and we'll incorporate them into your overall digital marketing strategy.

Expand

As part of our assessment, we will identify opportunities to augment your current campaigns or expand into other services that you might not have considered or had resources for.

We don't wait until day 30 to do this. Optimization happens as soon as we're granted access to your campaigns and the audit is complete.

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Key Considerations To Remember When Onboarding With A New Agency

No matter which digital marketing agency you decide to work with, it's important to keep a few things in mind. First, why did you decide to make the change in the first place? Is it because you don't have enough resources in-house to execute a holistic marketing strategy? Or maybe you had contracted with another agency and the relationship started going south? Understanding the why can help you prepare for a smoother transition with the new agency that you end up retaining.

During agency onboarding, here are a few things to look for:

- Communication and transparency
- Emphasis on measurable outcomes (including how, specifically, to get there)
- Accommodation and collaboration, not “my way or the highway”
- Follow-up, follow-up, follow-up (accountability)

Once we get started, we encourage you to revisit the agency onboarding timeline we've provided, sample checklist items, and things to look out for as you begin this important transition. As always, do let us know if there's any way that we can help.



A blurred background image showing a group of people in a meeting. One person is holding a tablet displaying a dashboard with a pie chart and bar graphs. The scene is brightly lit, suggesting an office environment.

Learn more about Cardinal's digital marketing services.

