A local SEO client onboarding checklist for agencies

This is an agency workflow. Profile verification methods remain those offered by Google for each establishment.

1. Agree the scope

Before requesting access, agree the locations, services, approval process and exclusions. Identify someone who can confirm the facts for each profile.

- [ ] List locations, addresses and profile URLs
- [ ] Identify the signatory and operational contacts
- [ ] Agree deliverables, frequency, deadlines and exclusions
- [ ] Define who prepares, approves and publishes

2. Check ownership and access

The client should retain control of their profile. Use appropriate Google invitations and roles without sharing passwords. Record ownership issues, duplicates or suspensions before promising a launch date.

- [ ] Identify the primary owner and correct establishment
- [ ] Invite the agency account with the necessary role
- [ ] Check verification status and blockers
- [ ] Document access and plan its removal at the end of the engagement

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Use this checklist when taking over one or several Google profiles. Assign each task, record its status and keep the evidence needed for a shared agency-client handover.

3. Collect accurate business details

Compare the profile with the website and actual premises. Confirm the trading name, address or service area, hours, categories, phone and destination links before editing.

- [ ] Approve name, contact details, activity and categories
- [ ] Record usual hours and exceptional closures
- [ ] Check website, booking and other available links
- [ ] Keep client approval and change dates

4. Prepare content and reviews

Request authentic visuals with publishing rights. Agree tone, approved offers and replies needing review. Complaints and private information require human attention.

- [ ] Collect logo, recent photos and permissions
- [ ] Prepare a content calendar and approvals
- [ ] Define signature, tone and escalation for sensitive reviews
- [ ] Plan review invitations without satisfaction filtering or rewards

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5. Establish the baseline

Keep a dated baseline before editing: available metrics, tracked queries and scan settings. A missing result should not become zero without explanation.

- [ ] Export or record available metrics and periods
- [ ] Agree useful queries and areas with the client
- [ ] Record each measurement’s date and settings
- [ ] Document missing information and its known cause

6. Launch and hand over

Test the journey with the intended account, check recipients and show the client where to find their information. Agree the next review and a channel for urgent requests.

- [ ] Check the first actions actually published
- [ ] Test portal permissions and enabled notifications
- [ ] Approve the baseline review and priorities
- [ ] Schedule the first report and plan access handback