



Digital Marketing Agency Client Account Support Checklist 2026

Initial Client Onboarding & Access Verification

Verify all necessary platform permissions, API keys, and administrative access for Google Ads, Meta Business Suite, and Analytics are active and documented.

Onboarding Start Date

Client Account Name

Platforms Access Verified

- ☐ Google Ads
- ☐ Meta Business Suite
- ☐ Google Analytics 4
- ☐ LinkedIn Campaign Manager
- ☐ TikTok Ads Manager
- ☐ Google Search Console

Client Brand Guidelines Document

 Upload File

Access Issue Notes & Troubleshooting Log

Write something...

Account Manager Verification

Account Audit & Baseline Performance Review

Review historical campaign data, current conversion rates, and existing KPI benchmarks to establish a starting point for the support period.

Audit Conducted Date

Enter date...

Current Monthly Ad Spend

Write something...

Baseline Conversion Rate (%)

Enter a number...

Account Health Status

- ☐ Healthy
- ☐ At Risk
- ☐ Critical/Underperforming

Key Performance Observations

Write something...

Historical Performance Report

 Upload File

Audited Channels

- ☐ Google Ads
- ☐ Meta Ads
- ☐ LinkedIn Ads
- ☐ Email Marketing
- ☐ SEO/Organic

Account Manager Approval

Campaign Monitoring & Performance Tracking

Conduct daily checks on budget pacing, click-through rates (CTR), and cost-per-acquisition (CPA) to ensure alignment with client goals.

Reporting Period Start Date

Reporting Period End Date

Current Campaign Spend (USD)

Current CPA (Cost Per Acquisition)

Campaign Performance Status

- ☐ On Track
- ☐ At Risk
- ☐ Underperforming
- ☐ Critical Alert

Performance Variance Notes

Write something...

Weekly Performance Report PDF

 Upload File

Account Manager Verification

Creative & Copy Maintenance

Ensure all active ad creatives, landing pages, and ad copy are up-to-date, error-free, and reflect the latest brand guidelines.

Last Creative Review Date

Enter date...

Ad Copy Status

- ☐ Approved
- ☐ Pending Review
- ☐ Requires Update
- ☐ Under Revision

Assets Checked

- ☐ Headlines
- ☐ Body Copy
- ☐ Display Images
- ☐ Video Assets
- ☐ Call to Action (CTA) Buttons
- ☐ Landing Page Alignment

Updated Brand Guidelines/Assets

 **Upload File**

Identified Copy Discrepancies or Errors

Write something...

Number of Updated Ad Sets

Enter a number...

Technical Integration & Tracking Validation

Validate that conversion pixels, GTM tags, and server-side tracking are functioning correctly and capturing data accurately.

Tracking Tools Verified

- ☐ Google Tag Manager
- ☐ Google Analytics 4 (GA4)
- ☐ Meta Pixel
- ☐ Google Ads Conversion Tracking
- ☐ LinkedIn Insight Tag
- ☐ Hotjar/Clarity Heatmaps

Pixel/Tag ID Verification Status

Write something...

Last Validation Date

Enter date...

Detected Tracking Discrepancies or Error Logs

Write something...

Upload Screenshot of Tag Assistant/Debugger Results

 Upload File

Technical Specialist Approval

Client Communication & Reporting Cadence

Manage the schedule for weekly status updates, monthly performance deep-dives, and urgent alert notifications for budget or performance fluctuations.

Next Scheduled Client Sync Date

Enter date...

Reporting Frequency

- ☐ Weekly
- ☐ Bi-Weekly
- ☐ Monthly
- ☐ Quarterly

Communication Channels Used

- ☐ Email
- ☐ Zoom/Google Meet
- ☐ Slack/Teams
- ☐ Phone Call
- ☐ Client Portal

Key Discussion Points for Upcoming Meeting

Write something...

Monthly Performance Report PDF

 Upload File

Account Manager Approval

Issue Escalation & Troubleshooting Protocol

Follow established workflows for handling disapproved ads, tracking discrepancies, or sudden drops in campaign performance.

Issue Severity Level

- ☐ Low - Minor discrepancy or cosmetic error
- ☐ Medium - Performance dip or tracking delay
- ☐ High - Budget overrun or account suspension
- ☐ Critical - Total campaign downtime or data breach

Issue Description

Write something...

Date Issue Detected

Enter date...

Troubleshooting Steps Taken

Write something...

Impacted Platforms

- ☐ Google Ads
- ☐ Meta Ads
- ☐ LinkedIn Ads
- ☐ Google Analytics/G4
- ☐ Email/CRM Integration

Screenshot of Error/Error Logs

 Upload File

Support Lead Approval

Competitor & Market Trend Analysis

Monitor industry shifts and competitor ad spend/creative strategies to provide proactive strategic recommendations.

Analysis Period Date

Enter date...

Primary Competitor Name

Write something...

Competitor Channels Monitored

- ☐ Google Search
- ☐ Meta Ads (Facebook/Instagram)
- ☐ TikTok
- ☐ LinkedIn
- ☐ Organic SEO

Key Competitor Strategy Observations

Write something...

Market Sentiment Level

- ☐ Increasing Competition
- ☐ Stable
- ☐ Decreasing Competition

Competitor Ad Screenshots or Reports

 Upload File

Monthly Account Optimization & Scaling

Execute A/B testing results, keyword expansions, and budget reallocations based on the previous month's performance data.

Optimization Tasks Completed

- ☐ A/B Test Analysis
- ☐ Keyword Expansion
- ☐ Negative Keyword Scrubbing
- ☐ Budget Reallocation
- ☐ Ad Copy Iterations
- ☐ Landing Page Tweaks

Percentage Change in CPA

Optimization Completion Date

Summary of Scaling Recommendations

Updated Performance Report

 Upload File

Account Manager Approval

Post-Support Review & Retention Strategy

Perform a month-end review of all support tickets and account health scores to prepare for the upcoming monthly strategy session.

Review Completion Date

Client Satisfaction Score

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Unsatisfied
- ☐ Very Unsatisfied

Retention Risk Indicators

- ☐ Decreased Budget
- ☐ Communication Delays
- ☐ Unmet KPI Targets
- ☐ Competitor Poaching
- ☐ None - Account Healthy

Key Improvement Areas for Next Month

Write something...

Updated Strategy Roadmap Document

 Upload File

Account Manager Approval

< Previous

> Next

🔑 Finish

 Generate Sample Report