Agency Offboarding Checklist

ScaledOn

## Protect Your Business. Own Your Growth.

What every business owner should do before switching agencies, contractors, or freelancers.

🚨 Why This Matters?

Too often, businesses part ways with an agency and lose access to critical assets - ads, audiences, automations, even their website. This isn't just inconvenient. It can cost you **data, dollars, and months of momentum.**

This checklist is designed to help you:
- Maintain full ownership of your marketing stack
- Avoid disruptions during the transition
- Secure your data, assets, and performance history
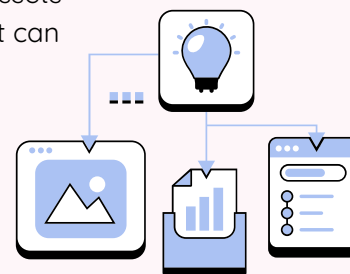
📂 SECTION 1: Accounts & Admin Access

- [ ] **Google Ads account** - You are the admin owner
- [ ] **Meta Business Manager** - You control business settings + ad accounts
- [ ] **Google Analytics (GA4)** - You have admin access
- [ ] **Google Tag Manager** - You're the container admin
- [ ] **Search Console + Google Business Profile** - Transferred or added as owner
- [ ] **CRM platform (e.g., HubSpot, Klaviyo)** - All users reviewed; former agency removed
- [ ] **Email Marketing tools** - You control DNS/authentication settings
- [ ] **Zapier/Make/Integromat** - Flows owned by company email, not freelancer
- [ ] **AI tools / integrations (ChatGPT, Jasper, etc.)** - Check admin and data ownership

🌐 SECTION 2: Website & Hosting

- [ ] **Domain registrar access (e.g., GoDaddy, Namecheap)** - You are the registrant
- [ ] **Hosting platform (e.g., SiteGround, WP Engine)** - In your name, not the agency's
- [ ] **CMS logins (WordPress, Shopify, Webflow, etc.)** - You have full control
- [ ] **Website backups created** (files + database)
- [ ] **Theme, plugins, API keys documented and transferred**

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- ☐ **Old agency email addresses removed** from hosting and CMS
- ☐ **SSL, CDN, and caching tools** tied to your accounts

🎯 SECTION 3: Campaign Assets & Data

- ☐ **Ad creatives, copy, and design files** saved to your drive (not theirs)
- ☐ **Audience exports** from Meta, Google, or DSP platforms
- ☐ **Keyword and negative keyword lists** exported
- ☐ **Performance reports and dashboards** archived
- ☐ **Campaign naming conventions + strategy notes** documented
- ☐ **Pixels + Events** checked for proper ownership in Meta & GTM
- ☐ **Any AI training data or custom logic** documented and stored

📁 SECTION 4: Documentation & SOPs

- ☐ **SOPs for automations and tools** (Zapier, email flows, CRM logic)
- ☐ **Naming conventions for campaigns, audiences, UTM links**
- ☐ **Workflows for lead routing and follow-up**
- ☐ **Design file links** (Canva, Adobe, Figma) with version history
- ☐ **API integrations and keys** documented
- ☐ **Passwords changed** (shared tools, CMS, hosting, etc.)

📤 SECTION 5: Communication & Transition

- ☐ **Send a formal offboarding notice** with a request for full handoff
- ☐ **Request account transfer + admin access in writing**
- ☐ **Schedule a wrap-up call** to clarify any last steps

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- ☐ **Remove all former agency logins** from tools and platforms
- ☐ **Redirect support or billing emails** as needed
- ☐ **Audit billing:** cancel unused tools tied to the old agency

🧠 Pro Tip: Assign One Owner Internally

Designate a team member (or yourself) to **own the transition**. Offboarding without ownership is how things fall through the cracks.

✅ BONUS: What to Ask Before You Sign With a New Agency

- Who will own the ad accounts, hosting, and tracking setup?
- Will I have admin access to all tools from day one?
- Where will SOPs and campaign documentation be stored?
- What's your offboarding policy - and can I see it in writing?