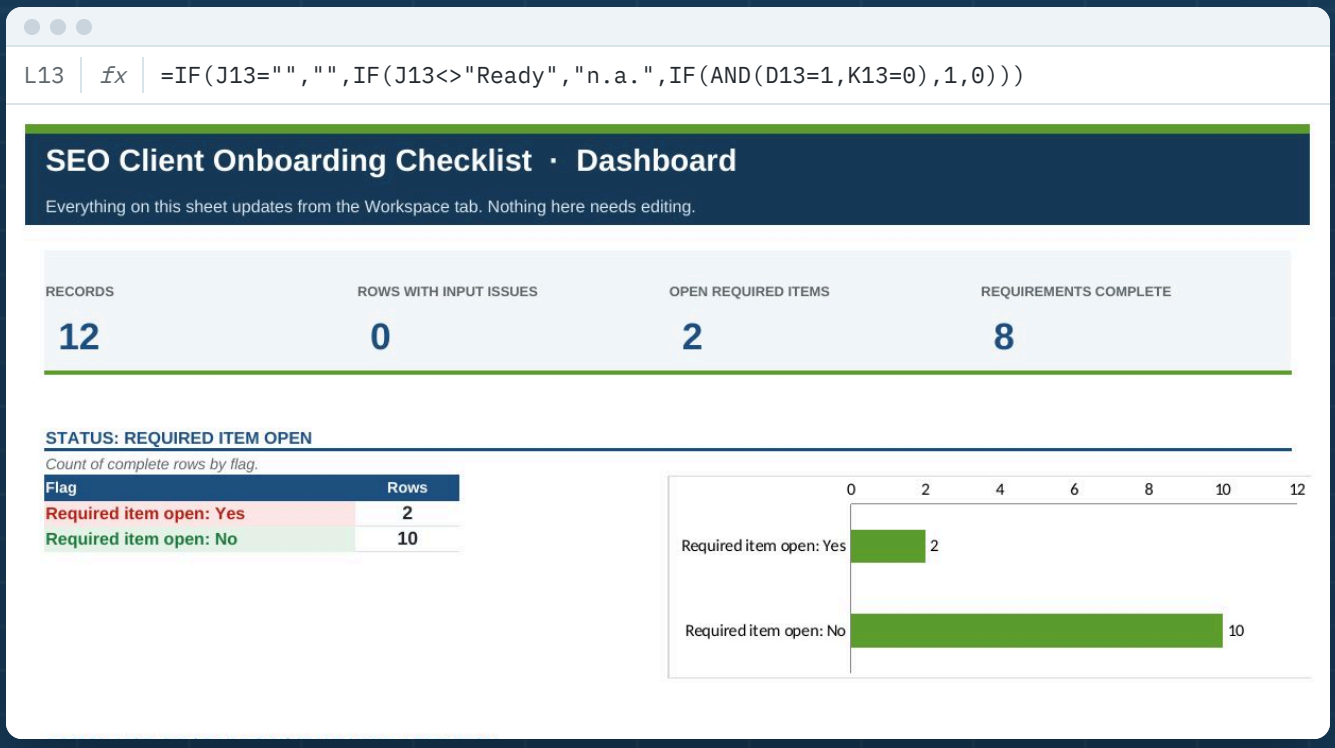
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 39

SEO Client Onboarding Checklist

Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether a new SEO engagement has everything it needs to start: access verified, definitions agreed and baselines captured, and what's blocking the rest.

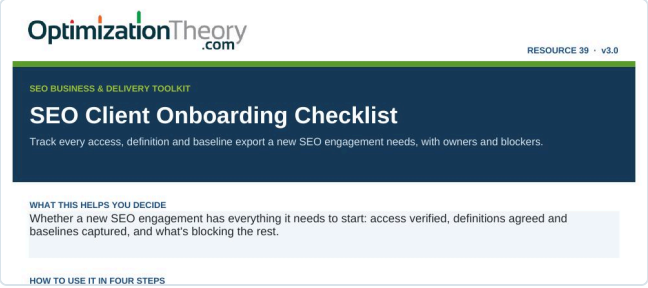
The first month of an SEO engagement is often lost to waiting: for Search Console access, for analytics permissions, for someone to explain what counts as a conversion. Every week of waiting is a week of strategy built on guesses.

This SEO onboarding checklist lists each requirement with the system, whether it's required, whether access is verified, owner, evidence and blocker. A requirement is complete only when access is verified with evidence. Required items still open are counted and listed on the Dashboard.

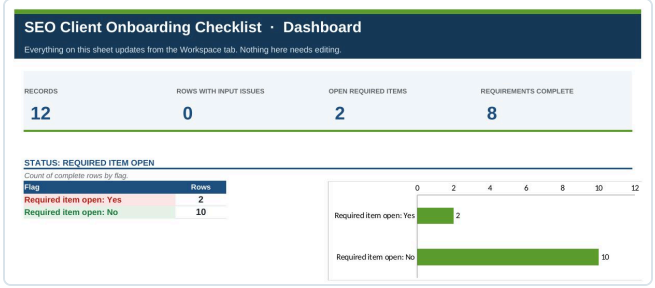
Who it's for

- Consultants and agencies onboarding SEO clients
- In-house SEOs joining a new company
- Project managers kicking off SEO projects
- Clients who want to know what to prepare

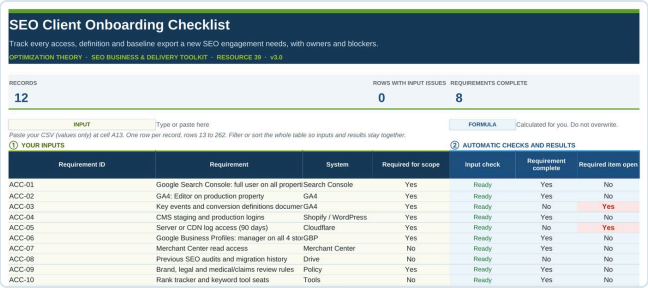
What's in the workbook



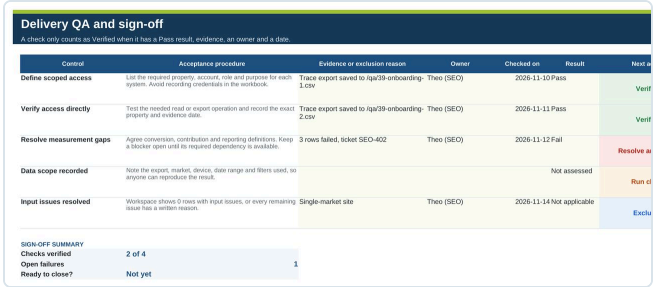
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Requirement complete = 1 when access verified is 1 and evidence exists. Required item open = 1 when the item is required and not complete.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(AND(D13=1,K13=0),1,0)))
```

Result column	Plain-English formula	What it tells you
Requirement complete	IF(AND(Access verified=1,Verification evidence ≠ ""),1,0)	Usable access plus verification evidence.
Required item open	IF(AND(Required for scope=1,Requirement complete=0),1,0)	A required item remains open until verified with evidence.

How to use it, step by step

1

Send the list before kickoff

Share the requirements with the client so access requests start early.

2

Assign owners on both sides

Each item needs a named person who can grant or confirm it.

3

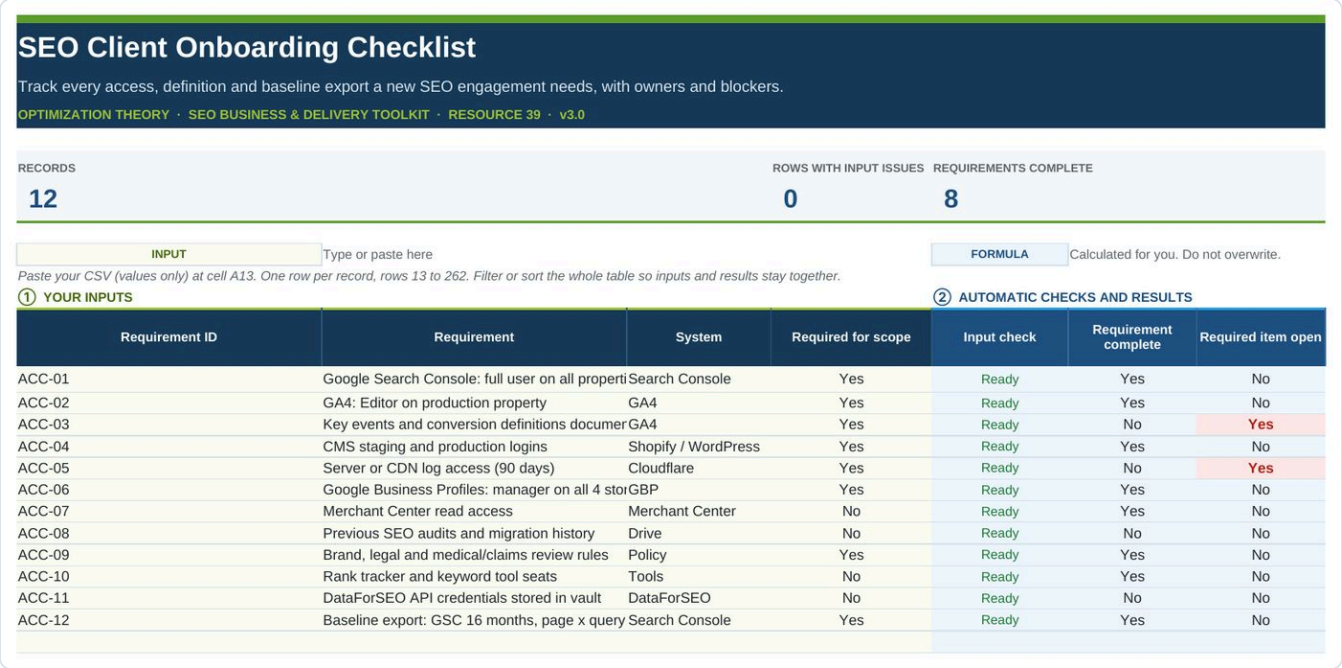
Verify, don't assume

Mark access verified only after you've logged in and checked. Record evidence.

4

Escalate blockers

Required items with blockers go to the kickoff agenda.



SEO Client Onboarding Checklist

Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 39 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	REQUIREMENTS COMPLETE
12	0	8

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Requirement ID	Requirement	System	Required for scope	Input check	Requirement complete	Required item open
ACC-01	Google Search Console: full user on all properti	Search Console	Yes	Ready	Yes	No
ACC-02	GA4: Editor on production property	GA4	Yes	Ready	Yes	No
ACC-03	Key events and conversion definitions documer	GA4	Yes	Ready	No	Yes
ACC-04	CMS staging and production logins	Shopify / WordPress	Yes	Ready	Yes	No
ACC-05	Server or CDN log access (90 days)	Cloudflare	Yes	Ready	No	Yes
ACC-06	Google Business Profiles: manager on all 4 stor	GBP	Yes	Ready	Yes	No
ACC-07	Merchant Center read access	Merchant Center	No	Ready	Yes	No
ACC-08	Previous SEO audits and migration history	Drive	No	Ready	No	No
ACC-09	Brand, legal and medical/claims review rules	Policy	Yes	Ready	Yes	No
ACC-10	Rank tracker and keyword tool seats	Tools	No	Ready	Yes	No
ACC-11	DataForSEO API credentials stored in vault	DataForSEO	No	Ready	No	No
ACC-12	Baseline export: GSC 16 months, page x query	Search Console	Yes	Ready	Yes	No

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 39 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Requirement ID, Requirement, System, Required for scope, Access verified, Owner, Verification evidence, Open blocker

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

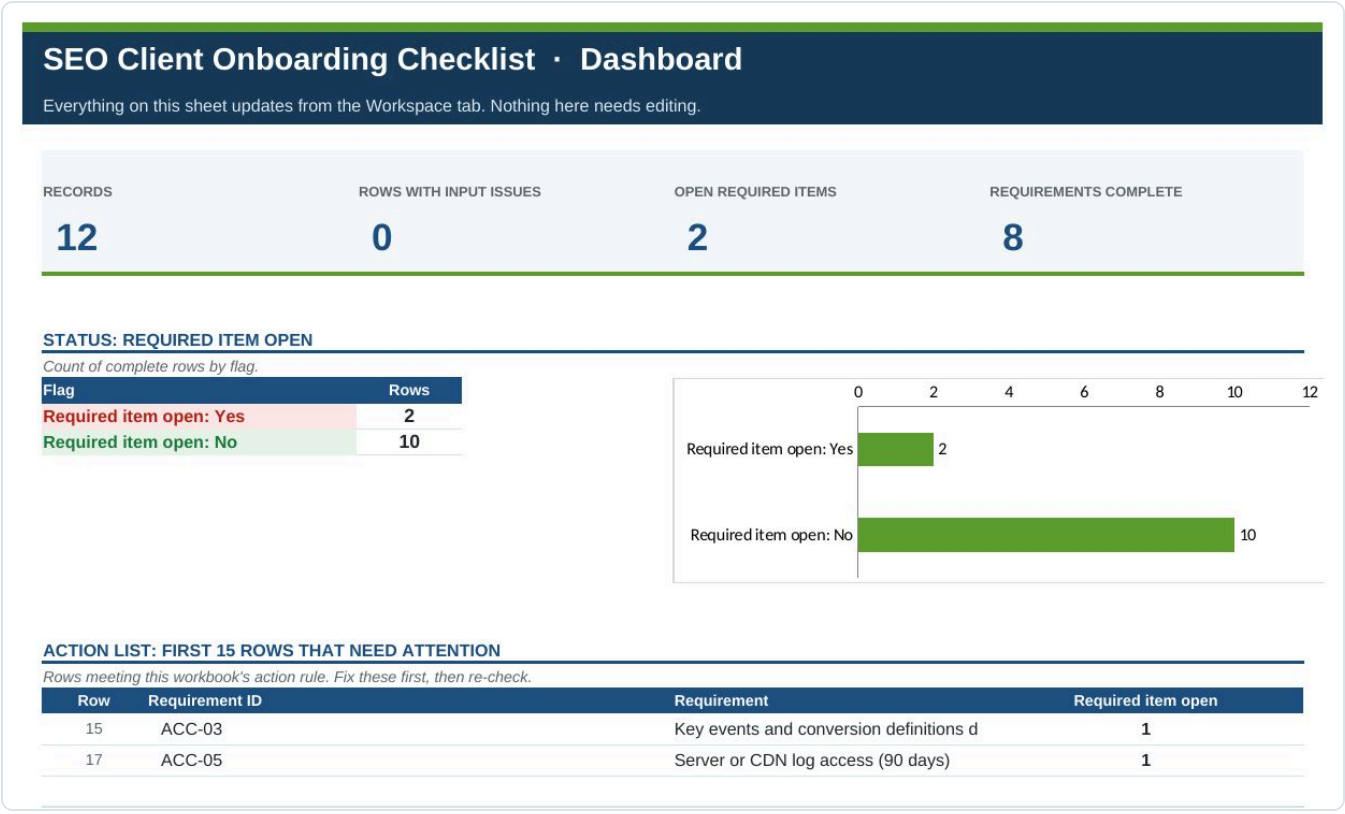
CSV field	Column	Meaning and rule	Typical source
`requirement_id`	Requirement ID	Stable onboarding requirement identifier.	Your records or manual review
`requirement`	Requirement	Specific access or discovery acceptance condition.	Your records or manual review
`system`	System	Source system or business owner.	Your records or manual review
`required`	Required for scope	1 when needed for the agreed engagement. 1 = Yes, 0 = No.	Your records or manual review
`access_verified`	Access verified	1 after the requested access or evidence is actually usable. 1 = Yes, 0 = No.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`evidence`	Verification evidence	Link to a permission check or approved business record. Never include passwords. Optional.	Your records or manual review
`blocker`	Open blocker	Specific missing item or dependency. Enter NONE when resolved.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	2	8
Records	Rows with input issues	Open required items	Requirements complete

Two required items are still open in the example: conversion definitions waiting on finance, and server log access that isn't enabled. Both block meaningful strategy work.



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Access is complete only when it works for the needed property, scope and data range.

Limits. This is an evidence workflow. DataForSEO supplies independent crawl and market context, not private account access.

Mistakes to avoid

Accepting 'you have access' without checking. Permissions are often lower than promised. Log in and verify.

Skipping definitions. Without agreed conversion definitions, every report becomes a debate.

Not capturing baselines early. Export 16 months of Search Console data on day one. It disappears after that window.

Tips from the field

Use the 90-day roadmap once onboarding closes.

Keep this checklist as part of your statement of work.

Re-run access checks quarterly; people and permissions change.

Questions people ask

What do I need from a new SEO client?

Search Console and analytics access, CMS access, conversion definitions, previous audits, brand and legal guidelines, Business Profile access for local businesses and baseline data exports.

What level of Search Console access do SEOs need?

Full user is usually enough for analysis. Owner is needed for some settings like change of address.

How long should SEO onboarding take?

One to two weeks when access is prepared in advance. Blockers usually come from permissions and definitions.

Why export Search Console data at the start?

Search Console keeps 16 months of data. Exporting early preserves the baseline for later comparisons.

Templates that work well with this one

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-onboarding-checklist/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.