TEMPLATE

Marketing-team onboarding form

Starting points to adapt with your attorney and advisors, not finished legal documents.

Give this form to any agency, contractor or new marketing hire before they start. Nothing runs until it is complete and signed.

Company legal name _____ Brand name _____

Domains the team may work on _____

Where brand assets are stored, and who grants access _____

Approved products and offers, with prices _____

Compliance-approved claims list: version _____ dated _____ (attach)

Banned words and claims (attach)

Certification status: certified / preliminary / in review / not applying. Certification date or expected date _____

Ad platform authorizations held, by platform _____

States served _____ States excluded _____

Ad accounts the team may use, and who owns them _____

Tracking access granted (analytics, tag manager, CRM fields) _____ Fields the team must never see or send _____

Approval chain: drafts go to _____, then to _____

Named approver whose written yes is required before any ad, page, email or post runs _____

Compliance contact for questions _____

Monthly budget _____ Billing contact and terms _____

Start date _____

Signed for the company _____ Signed for the marketing team _____ Date _____