

• AGENCY GROWTH • RETENTION

The Client Onboarding System

The fill-in first-30-days system that turns a signed contract into a locked-in retainer before the client ever forms the "is this actually working?" doubt. The **5-email welcome sequence**, the **kickoff agenda**, the **intake questionnaire**, the **30/60/90 sheet**, and the engineered first-week quick win, word for word.

The day-by-day 30-day map

5 welcome emails (verbatim)

15-field intake form

The kickoff-call script

The fill-in checklist

THE FIRST 90 DAYS DECIDE EVERYTHING

You did not lose the client at month six. You **lost them in week two.**

"We close the deal, the client is all excited, and then it goes quiet for two weeks while I scramble to figure out what I actually need from them."

That silence is the kill zone. The client signed on a feeling, and feelings cool fast. You are heads-down trying to remember which logins you forgot to ask for. They are sitting there wondering if anything is happening. By the time you surface with something to show, the doubt has already set in. One agency owner put it plainly: **"I lost a client at day 45 who told me 'I just wasn't sure anything was happening.' We were working the whole time. I just never showed them."**

THE UNCOMFORTABLE TRUTH

43% of B2B client churn happens in the first 90 days, and project-style agencies lose about 28% of clients inside six months. The work was usually fine. The onboarding was not. When you send a generic "welcome aboard" email and then disappear into delivery, you teach the client that nothing is happening, and they act on what you taught them.

A signed contract is not a kept client.
The first 30 days **decide which one you have.**

Here is the fix, and it is not "care more." It is a system the client can feel. A welcome email in the first hour. An intake form they finish in 48 hours. A kickoff call that ends with three clear answers. Something tangible shipped by day seven. This document is that system, fill-in and ready to deploy this week.

43%

of B2B client churn happens in the first 90 days

Moxo, 2026 B2B Retention Report

86%

are more likely to stay loyal to a business that invests in onboarding

Wyzowl, Customer Onboarding Statistics

2.3x

better retention for retainer vs project agencies (56 vs 24-month life)

Focus Digital, 2026 Agency Churn Report

THE 30-DAY MAP

Every day of the first month, **already decided**

Stop inventing onboarding from scratch on every account. This is the fixed sequence. Run it the same way every time, and the client feels momentum instead of silence.

DAY
0

Welcome email + invoice

Within the hour. "You're in, here's exactly what happens next," with the 30-day map attached so they see the whole plan.

DAYS
1-2

Intake questionnaire

Send the link with a **48-hour deadline**. Pre-filled with everything sales already knows. You only ask what is new.

DAY
3

Kickoff call (30 to 45 min)

Fixed agenda. Ends with three answers: what we ship this week, who their single point of contact is, when we next talk.

DAYS
4-7

The engineered quick win

Ship one tangible thing by day seven. An audit, live creative, a fixed tracking gap. Proof the engine has started.

DAY
14

Proactive status note

A human touchpoint **before they ask**. This single mid-month check correlates with up to 9% better six-month retention.

DAY
30

The Day-30 review

First results readout against the baseline you set on Day 3. This is where month-to-month becomes month twelve.

X INTAKE DRAGS PAST 10 DAYS

<50%

retention. When the client stalls the handoff and you let it slide, the account never builds momentum and **fewer than half survive**.

✓ INTAKE DONE IN 48 HOURS

85%+

retention. A fast, clean start is the single biggest signal that **the client commits and stays**. Speed is the system.

Retention figures directional, based on onboarding-completion patterns in B2B service relationships (Moxo, Focus Digital, 2026). Individual results vary.

5 EMAILS, WORD FOR WORD

The sequence that **replaces silence** with momentum

Five emails over the first two weeks. Copy them, swap the brackets, schedule them once. This is the difference between "welcome aboard" and a client who never doubts the engine is running.

HOURL 1

SUBJECT

You're in. Here's exactly what happens next.

"[Name], welcome aboard. I want you to know exactly how the next 30 days run, so nothing feels like a black box. I've attached your 30-Day Map. The short version: tomorrow you'll get a quick intake form (15 minutes), then we hop on a kickoff call on [date], and you'll have your first deliverable in hand by [day 7 date]. Your invoice is attached. Reply 'got it' so I know this landed."

JOB • Kill the post-sale silence in the first hour. Set the whole timeline before doubt can start.

DAY 1

SUBJECT

Your intake form (15 min, due [48-hr date])

"Here's your intake form: [link]. It takes about 15 minutes and it's the one thing standing between us and a fast start. Please finish it by [date, 48 hours out] so the kickoff call is productive instead of a fact-finding mission. I've pre-filled everything you already told [salesperson], so you're only confirming and filling the gaps."

JOB • Get the intake done inside 48 hours. Clients who do retain above 85%.

DAY 2

SUBJECT

Kickoff call [date] - here's the agenda

"Calendar invite for our kickoff is in your inbox: [date, time]. Here's what we'll cover so you can show up ready: your success criteria, scope and dependencies, how we'll communicate, and the exact thing we ship in your first week. Bring whoever signs off on the work. By the end of the call you'll know what we ship this week, who your point of contact is, and when we next talk."

JOB • Set the kickoff agenda in advance so the call runs tight and the decision-maker shows.

THE PROOF EMAILS

Emails 4 and 5 are where **retention is won**

DAY 7

SUBJECT

Your first win is live

"As promised, here's your first deliverable: [the quick win, e.g. your account audit / first live ad / fixed tracking]. Two things I want you to see in it: [specific finding 1] and [specific finding 2]. This is week one. Here's what's coming next: [next concrete step]. Quick question so I can tailor month one: what's the one number you most want to see move by day 30?"

JOB • Deliver tangible proof by day 7. A real first-week win correlates with materially better retention.

DAY 14

SUBJECT

Two weeks in - here's where we stand

"Quick proactive update, no action needed from you. Here's what we've done since kickoff: [3 bullets]. Here's what's in flight for the next two weeks heading into your Day-30 review: [2 bullets]. Everything's on track against the baseline we set. If anything feels off or unclear, hit reply, that's exactly what I want to hear before our review, not after."

JOB • The mid-month human touch. Reaching out before they ask is the move that lifts six-month retention.

Clients do not churn because you did **too little work**. They churn because you showed them too little of it.

Notice what every email does: it removes uncertainty before the client has to go looking for it. The Day-14 email matters most. **73% of clients who leave blame poor communication and a lack of proactive updates**, yet only 58% of agencies even report monthly. Sending one short note before the client wonders where you went is the cheapest retention move you own.

Sources: AgencyAnalytics 2024 Marketing Agency Benchmarks (251 agencies); Wyzowl Customer Onboarding Statistics. 86% of people say they stay more loyal to businesses that invest in onboarding content.

THE INTAKE QUESTIONNAIRE

The 15 fields that **end the week-two scramble**

The rule that makes this work: **pre-fill everything sales already knows**. Only ask what is new. A 15-minute form, not a 40-field interrogation. The red dashed lines are theirs to fill in.

1 North-star metric / goal

2 Target customer (who we sell to)

3 Current baseline numbers

4 Brand assets (logos, fonts, files)

5 Logins & access we'll need

6 Decision-maker (final sign-off)

7 Approval workflow / turnaround

8 Single point of contact

9 Top 3 competitors

10 Past agency: what went wrong

11 Hard nos / brand red lines

12 Preferred communication channel

13 The one number you most want moved by Day 30 **DEFINES THE QUICK WIN**

14 What does "this is working" look like to you in 90 days? **SETS EXPECTATIONS**

15 Anything we'd be foolish not to ask? **CATCHES THE LANDMINE SALES MISSED**

Field 13 is the most important field on the form. It tells you exactly which quick win to engineer for day seven. **Ask for the answer in their words, then deliver against it.**

THE KICKOFF-CALL AGENDA

A 45-minute script that ends with **three locked answers**

If the kickoff lives only in your head, nothing starts until you personally run it, and every call drifts. Run this fixed agenda instead. Open with the line below, then work the clock.

**THE OPENER (SAY THIS VERBATIM)**

"By the end of this call you'll know exactly three things: what we ship this week, who your single point of contact is, and when we next talk. Let's get those nailed down."

0-5

MIN

Intros & role mapping

Who does what on both sides. Name the single point of contact out loud and confirm the decision-maker is in the room.

5-15

MIN

Validate success criteria

Read back their Day-30 number from the intake. **"You said you want [X] moved. Confirm that's still the priority."** This is the anchor for everything.

15-25

MIN

Confirm scope & dependencies

What's in, what's out, and what you need from them and by when. Surface every blocker now, not in week three.

25-35

MIN

Communication cadence & reporting

Lock the channel, the meeting rhythm, and the Day-30 review date. Tell them when proactive updates land so silence never reads as nothing happening.

35-45

MIN

First-week quick win & next steps

Name the exact thing you ship by day seven and the dated owner for every action. End on momentum, not "we'll be in touch."

Agencies that set realistic KPIs during onboarding retain 15 to 20 points above the industry average.

Focus Digital, Average Marketing Agency Churn: 2026 Report. The kickoff is where those KPIs get set, in the client's own words, and agreed out loud.

THE 30/60/90 EXPECTATION SHEET

Tell them when results land, **before they expect them early**

The most common early churn story is "they expected leads in the first two weeks and I never set the expectation that month one is setup." So now you look slow when you were on schedule. Hand the client this sheet at kickoff and read it out loud.

30

FOUNDATION

What month one is:

- Access, tracking, and **baseline** locked in
- Strategy built and approved
- First quick win shipped by day 7
- Plainly: this month is **setup**, **not scale**.

60

EARLY SIGNAL

What month two shows:

- First campaigns live and iterating
- **Early signal** in the numbers, not final results
- What's working gets doubled down
- We kill what isn't, fast

90

MEASURABLE LIFT

What month three proves:

- **Measurable lift** against the Day-0 baseline
- The engine is tuned and predictable
- The QBR conversation: "here's the next 90"
- This is where they re-sign without flinching

WHY THIS SINGLE SHEET SAVES ACCOUNTS

A large share of value-related churn traces to one preventable thing: **the client expected results on a timeline you never set**. They are not unreasonable. They are uninformed, and that is your fault to fix. When you state plainly that 30 is foundation, 60 is early signal, and 90 is measurable lift, a quiet month one reads as "on schedule" instead of "this agency is slow." You move the goalpost into the open, where you both can see it.

An expectation you set is a promise you keep.
An expectation you **leave unsaid is a refund you fund.**

THE ENGINEERED QUICK WIN

Put something tangible in their hands **by day seven**

Real results take a month. Proof the engine started takes a week. Pick one of these five, deliver it by day seven, and the client feels motion long before the numbers move. Each is designed to be low effort for you and high signal for them.

1

A delivered audit

A short, sharp teardown of their current setup with **2 to 3 specific findings** they did not know. Shows you already dug in.

LOW EFFORT

2

One piece of live creative

A single ad, landing section, or email, built and shipped. **One real artifact beats a deck of promises.**

MED EFFORT

3

A fixed tracking gap

Find the broken pixel, the untagged form, the missing conversion event, and fix it. **Often the reason their last agency "had no results."**

LOW EFFORT

4

A competitor teardown

What their top 3 competitors are running and where the open lane is. Pure insight, zero dependency on their assets.

LOW EFFORT

5

A baseline dashboard

One screen, the Day-0 numbers that matter, the metric from intake field 13 front and center. **Now every future report shows progress against it.**

MED EFFORT

**THE RULE**

Tie the quick win to **their answer to intake field 13** ("the one number you most want moved"). If they said leads, deliver the tracking fix or the first live ad. If they said clarity, deliver the audit or the baseline dashboard. **A quick win aimed at the wrong thing still reads as busywork. Aim it at their number and it reads as proof.**

THE ONBOARDING CHECKLIST

Run this on **every new client**. Miss nothing.

Print it, pin it, or drop it into your project tool as a template. Six groups, the full first 30 days.

When this is checked, the account is locked in, not hoped in.

1 Internal handoff

Day 0

- ☐ Sales notes passed to delivery
- ☐ Account owner assigned internally
- ☐ Intake **pre-filled** with known answers
- ☐ Welcome email + invoice sent (hour 1)

2 Access & assets

Days 1-2

- ☐ Intake form sent with **48-hr deadline**
- ☐ Brand assets & files received
- ☐ All logins / platform access granted
- ☐ Single point of contact confirmed

3 KPI baseline

Day 3

- ☐ Day-0 numbers recorded
- ☐ Success criteria validated on call
- ☐ Field-13 target number captured
- ☐ 30/60/90 sheet handed over

4 Cadence lock

Day 3

- ☐ Comms channel agreed
- ☐ Day-30 review on the calendar
- ☐ Meeting rhythm scheduled
- ☐ Decision-maker engaged

5 Quick win shipped

Day 7

- ☐ Quick win chosen & aimed at field 13
- ☐ 2 specific findings called out
- ☐ Delivered with Email 4
- ☐ Day-14 status note scheduled

6 Day-30 review

Day 30

- ☐ Results read against baseline
- ☐ Wins documented for the QBR
- ☐ Next-90-days plan presented
- ☐ Renewal / expansion teed up

THE NUMBERS TO TRUST

A kept client is the **cheapest revenue you own**

Onboarding is not a nicety. It is the highest-ROI 30 days in your whole agency, because the alternative to keeping a client is paying to replace one.

43%

of B2B client churn happens in the first 90 days

A human touchpoint beats automation by up to 30% on 90-day retention.

5-25x

more expensive to win a client than to keep one

Harvard Business Review, citing Bain & Company.

25-95%

profit lift from a 5% bump in retention

Bain / HBR, "The Value of Keeping the Right Customers."

Run the math on your own book. A \$3,000/month client kept for 56 months instead of 24 is worth **roughly \$96,000 more in lifetime value**, from the exact same close. You did not run a single new ad, take a single new call, or write a single new proposal. You just stopped the leak in the first 30 days. That is what this system does.

THE PART MOST OWNERS MISS

Better onboarding does not just save the account. It is the front end of your **referral engine and your expansion revenue**. A client who felt the system from day one is the one who answers "do you know anyone like you?" with a name, and says yes when you propose more scope at the Day-30 review. The first 30 days set the entire trajectory of the relationship. Get them right and retention, referrals, and upsells all compound off the same work.

Win the first 30 days and you stop re-earning the account every invoice.

Sources: Moxo, 2026 B2B Retention Report (43% of churn in the first 90 days); Marketing LTB Customer Retention Statistics 2026 (human-touchpoint 90-day figure); Harvard Business Review (Oct 2014), citing Frederick Reichheld of Bain & Company; Focus Digital 2026 Agency Churn Report (56 vs 24-month lifespans). Figures are third-party benchmarks, not AgencyGod promises. Individual results vary.

• YOUR NEXT MOVE

You can run the system. We can run it with you.

Onboarding is one link in the chain. The booked calls have to show, the discovery has to close, and the kept client becomes your cheapest next lead. We build and run that whole machine **with you**, which is the only reason we can put \$10,000 on the line.

You are not figuring this out alone at 9pm anymore.

Every month you keep onboarding in your head is another client lost at day 45 to a doubt you could have killed in week one. **Apply to AgencyGod now.** We cap intake to a handful of agencies a month so we can actually deliver, and every spot comes with the \$10,000 guarantee.

\$10K
GTD

You get the result or you get paid \$10,000

Apply to AgencyGod →

Free 30-min strategy call · limited monthly intake

agencygod.com

Results mentioned are real client outcomes and are not typical. Individual results vary with effort, market, and execution. The \$10,000 guarantee is real and subject to the program's written enrollment agreement terms.