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 _____