FIXMYSERPS / FREE RESOURCE

Start every SEO project with a clear plan.

ONBOARDING CHECKLIST + PROJECT BRIEF

A practical toolkit for new and existing websites, including AI visibility planning.

01 / Get ready

Collect the business context, access and approvals.

02 / Define the work

Set the scope, deliverables, owners and measures.

Print it, complete it and reuse it for your next project.

fixmyserps.com

How I use this toolkit

1. Complete the onboarding checklist with the business owner or project lead.
2. Fill in the project brief and record decisions, gaps and dependencies.
3. Confirm the scope, responsibilities and measurement plan before implementation.
4. Keep the brief updated when an approved change affects the work.

Mark each checkbox when complete. Use N/A where appropriate. Add an owner and due date for open items. Record access status, never passwords or recovery codes.

Project details

Project name

Website URL

Project lead

Kickoff date

First deliverable and due date

Need help delivering the work?

Talk to FixMySERPs about technical SEO audits, content reviews and optimisation, content strategy or AI visibility audits.

Discuss your project at fixmyserps.com/contact-us/

Part 1: Onboarding checklist

Business, audience and goals

- [ ] Record the website URL, business name, project contact and decision-maker.
- [ ] Identify the priority services or products and the audience for each.
- [ ] Confirm the real service areas, target markets and languages.
- [ ] Ask what makes an enquiry qualified and who handles it after submission.
- [ ] Record customer questions, objections, seasonality and capacity limits.
- [ ] Agree the primary business goal and how it will be measured.
- [ ] Collect approved business facts, proof of experience and permitted case studies.

Scope and responsibilities

- [ ] Confirm whether this is a new website, an existing website or a redesign/migration.
- [ ] List the pages, sections, markets and tasks included in the project.
- [ ] Specify deliverables, quantities, deadlines and revision rounds.
- [ ] Record what is excluded and what requires a separate estimate.
- [ ] Identify who writes, reviews, implements, approves and publishes.
- [ ] Record developer dependencies and the process for approving scope changes.
- [ ] Agree communication channels, meeting frequency and response times.

Access and source material

- [ ] Request the minimum access needed to the CMS, Google Search Console and GA4.
- [ ] Request Google Tag Manager access if tracking implementation is included.
- [ ] Confirm access to staging, backups and hosting support when required.
- [ ] Collect existing audits, keyword research, content plans and brand guidelines.
- [ ] Collect the sitemap, page/blog inventory and known technical problems.
- [ ] Confirm ownership of accounts and how project access will be removed at handover.
- [ ] Agree what client information can be shared with ChatGPT and other tools.

Starting point: new website

- [ ] Confirm the domain, platform, launch date and development contact.
- [ ] Map the planned pages and the purpose of each page.
- [ ] Plan analytics and enquiry tracking before launch.
- [ ] Record staging restrictions and the checks needed to make the live site crawlable.
- [ ] Include mobile layout, forms, internal links, redirects if needed and launch checks in the plan.

Starting point: existing website

- [ ] Record a baseline date range and a suitable comparison period.
- [ ] Review GSC queries/pages and GA4 landing-page and enquiry data where available.
- [ ] Crawl the website and record indexing, canonical, redirect, link and template issues.
- [ ] Inventory existing pages and blogs before proposing new content.
- [ ] Identify pages to keep, improve, merge or investigate for removal, with evidence.
- [ ] Record recent redesigns, migrations, tracking changes and major content updates.

AI visibility and use of tools

- [ ] Agree which audience questions and AI search surfaces matter to the project.
- [ ] Record a repeatable sample of prompts, dates, platforms and cited URLs for a baseline.
- [ ] Check whether priority pages explain the business, services and supporting evidence clearly.
- [ ] Review access for relevant crawlers and any technical restrictions within the agreed scope.
- [ ] Plan how to track identifiable AI referral visits and enquiries where the data allows it.
- [ ] Use ChatGPT to organise findings, draft briefs and challenge assumptions, then verify its output.
- [ ] Explain that prompt checks are snapshots and AI visibility cannot be guaranteed.

Ready-to-start check

- [ ] Confirm the agreed brief, priority list and named approver.
- [ ] Confirm the access needed for the first stage or a dated plan to obtain it.
- [ ] Record missing information, blockers, owners and due dates.
- [ ] Agree the first deliverable, its due date and acceptance criteria.

Open item: [What is missing?]

Owner: [Name]

Due date: [Date]

Effect on the project: [What must wait?]

Resolution: [Decision or action]

Part 2: Reusable project brief

Project name

Business and website

Project type

Prepared by

Business contact and approver

Version and date

Planned start and finish

Status

1. Why I am doing this work

The business needs

My primary goal

A qualified enquiry or sale means

Priority services/products

Audience, markets and languages

Customer questions and objections

Capacity or seasonal limits

2. What I know about the starting point

Baseline period and comparison

Current performance

Existing content and technical findings

Competitors to assess

Previous changes

Missing information

For a new site

3. My scope and deliverables

I repeat this block for each deliverable so the work is measurable.

Deliverable

Pages/markets covered

Work included

Output format

Owner

Dependencies

Due date

Completion check

Revision rounds

Excluded work

Change request process

4. How I use my tools

Google Search Console

Google Analytics 4

Screaming Frog

ChatGPT

CMS and other tools

Decision record

5. My AI visibility plan

Audience questions to test

Platforms and test conditions

Baseline observations

Priority improvements

Measurement

Review schedule

Limits

6. My stages and approval points

Discovery

Audit and research

Strategy and prioritisation

Content and implementation

Quality checks and launch

Reporting and handover

7. How I measure and report progress

Primary KPI

Supporting metrics

Data sources and owners

Tracking checks

Reporting frequency

Success review date

Interpretation limits

Report format

8. Risks, decisions and sign-off

Risk or blocker

Assumptions to verify

Business facts approved by

Scope approved by

Implementation/publishing authority

Budget and payment terms, if applicable

Handover requirements

Next action