



CLIENT RESOURCE · NO PASSWORDS REQUIRED

The 15–Minute Agency Access Checklist

Everything a marketing agency legitimately needs from you — what to grant, what to keep, and the three things you should never hand over.

01 Two minutes of prep

You cannot grant access properly without two pieces of information. Ask your agency for both before you open a single settings page — it saves the most common round trip.

Ask your agency for:

- Their **Google Ads manager account ID** — ten digits, formatted 123-456-7890
- Their **Meta Business Manager ID**
- **Which email addresses** to grant — ideally one shared team address plus named individuals, never a personal Gmail belonging to a single contractor

THE PRINCIPLE

02 Access, not credentials

Every platform in this checklist has a way to add someone by email address, at a defined permission level, that you can revoke yourself in two clicks. That is always the right mechanism. Sharing a password is never it.

INSTEAD OF	DO THIS	WHY IT MATTERS
Sending your login	Add their email as a user	Keeps two-factor authentication intact and leaves an audit trail of who changed what
Making them Owner	Grant Admin or Manager	They can do the work; they cannot remove you or take the asset with them
Handing over your registrar	Paste the DNS record they send	Your domain is your single most valuable credential. It never needs to leave your hands
"I added you to the page"	Share Page + ad account + pixel	Page access alone lets an agency post, not advertise. The pixel is what makes targeting work

Three things you never hand over

Your domain registrar login. Your Primary Owner role on Google Business Profile. Any password at all. An agency that insists on these is asking for leverage, not access — and no legitimate workflow requires them.

03 Work through it in order

Ordered so that nothing blocks anything else. Most businesses finish the whole thing in one sitting.

ADVERTISING · 5 MIN

- ☐ Google Ads: manager account link approved at **Admin → Access and security → Managers**
- ☐ Meta partner access granted — **Page, ad account, and pixel**, all three
- ☐ Meta assets confirmed as **Owned** by your Business Manager, not Partner

MEASUREMENT · 3 MIN

- ☐ Google Analytics 4: **Editor** access — Viewer is not enough to configure conversions
- ☐ Search Console: **Full** access, you keep Owner
- ☐ Tag Manager: Publish rights, container under your account
- ☐ Call tracking: user added, if you use it

LOCAL PRESENCE · 2 MIN

- ☐ Google Business Profile: added as **Manager** — not Owner, never Primary Owner
- ☐ Bing Places, Apple Business Connect, Yelp as needed

WEBSITE · 3 MIN

- ☐ CMS: named admin or staff user created
- ☐ Hosting: user account if caching or CDN work is coming
- ☐ DNS: you keep the registrar; they send records for you to paste

CONTEXT · 5 MIN, HIGHEST VALUE

- ☐ Average job value or customer lifetime value
- ☐ Rough close rate on leads
- ☐ Most and least profitable services
- ☐ Real service area — the one you'll actually drive to
- ☐ Brand assets and photos of real jobs and real crews
- ☐ Who answers the phone, and what happens after 5pm

OWNERSHIP SANITY CHECK

- ☐ You are Owner or Admin on every platform
- ☐ You can remove your agency without asking them
- ☐ No password was shared anywhere

Why the context section matters more than the access

Access lets an agency start. Context is what lets them be good. Without your real numbers, an agency optimises for cheap leads instead of profitable ones — a \$40 lead for a service you make \$200 on is worse than a \$150 lead for a service you make \$4,000 on, and only you know which is which.

04 The ownership audit

Working through the checklist often turns up something uncomfortable: an ad account owned by a former agency, a Business Profile you can't edit, a domain registered to someone else. Here's where to look and what you should see.

PLATFORM	WHERE TO CHECK	WHAT IT SHOULD SAY
Google Ads	Admin → Access and security	Your email listed as Admin; agency appears under Managers
Meta	Business Settings → Accounts	Page and ad account both marked Owned
Business Profile	Business Profile settings → People	You as Primary Owner , agency as Manager
Analytics / GSC	Admin → Access management	Your email with Administrator or Owner
Domain	Your registrar account	Registered to your business, and you can log in

If a row doesn't match, fix it now rather than at the point you want to leave. Ownership is easy to correct while the relationship is good and very hard afterwards — ad account history and pixel data cannot be moved to a new account, so losing them means restarting the algorithm's learning from zero.

NEXT STEP

Screenshots for all 17 platforms

Reading a checklist is one thing; finding Meta's Partners screen is another. Our Client Access Center walks through every item above, screen by screen.

[Open the Client Access Center →](#)

Or if you'd rather have someone tell you what's currently missing or mis-owned in your setup, [book a call](#) and we'll go through it with you.