CLIENT ONBOARDING GUIDE

# WELCOME TO THE MACHINE.

You just hired a leasing machine. This guide explains what happens in your first six weeks, what we need from you and when, and how we work together after launch. Read it once now; keep it nearby for the next month and a half.

## WHAT SUCCESS LOOKS LIKE

- → **Aligned strategy.** Goals, target tenants, rates, and priorities are clearly defined for every property.
- → **Fast, secure access.** Your platforms are connected in the first week, without a password ever sent by email.
- → **Efficient approvals.** One decision-maker, real turnaround times, agreed before production begins.
- → **Measurable performance.** Tracking connects marketing activity to inquiries, tours, and signed leases.
- → **Continuous improvement.** Campaigns are reviewed every month and refined using reliable data.

This guide supports onboarding and does not replace your signed agreement; if they differ, the agreement controls.

# 1 YOUR TEAM.

TAG is a two-person shop, on purpose. There is no account coordinator, no ticket queue, and no handoff between departments. **You will only ever talk to Jessica or Zach**, the two people actually doing the work, and both know your property by name.

| WHO | WHAT THEY OWN | CONTACT |
|---|---|---|
| **Jessica Johnson**<br>Owner & CEO | Strategy, every client-facing meeting, approvals, expectations, and escalations. If it is a decision, a plan, or a problem, it is Jessica. | jessica@tenantacquisitiongroup.com<br>(904) 713-5511 |
| **Zach**<br>Operations Lead | Builds, tracking, platform access, integrations, and quality assurance. Zach is the person who makes the tech painless. | zach@tenantacquisitiongroup.com<br>(830) 456-1609 |

Quick rule of thumb: strategy and approvals go to Jessica; access, logins, and anything technical goes to Zach. If you are not sure, send it to Jessica and she will route it.

### Your side: one decision-maker

Please designate **one primary decision-maker** for this engagement: the person who consolidates feedback from your partners, approves creative and plans, and unblocks access questions. Marketing timelines fail most often when three stakeholders give three sets of notes; one voice keeps your launch on schedule. Others are welcome on calls, but approvals come from one person.

YOUR DECISION-MAKER

Name

Email

Phone

**The boutique advantage:** when you call, the person who answers is the person who built your campaigns. Nothing about your property gets lost in translation, because there is nobody to translate to.

# 2 YOUR PLAN & WHAT'S INCLUDED.

Everything TAG does is priced **per property, per month, by the phase that property is in**. Your signed agreement states your exact rates and commitment term; here is the standard structure so nothing on an invoice ever surprises you.

| SERVICE PHASE | WHAT IT IS | STANDARD RATE |
|---|---|---|
| **Activation** | First month only. Covers the entire six-week build in Section 3: brand, website, listings, tracking, campaigns. **Waived on 12-month commitments.** | $2,000 |
| **Pre-Open** | Full campaign pressure while your property leases up, run against the construction timeline. | $4,000/mo |
| **Open & Leased** | Maintenance mode for stabilized properties: assets live and accurate, availability updated, waitlist warm. | $1,200/mo |
| **Re-Leasing** | Focused pressure aimed at open suites when a vacancy appears. | $2,500/mo |

### Your advertising budget is separate, and it is yours

Ad spend has a minimum of **$500 per month per property**, and it is paid by you **directly to the advertising platforms, in ad accounts you own**. TAG manages the campaigns; the money, the accounts, and all the data in them belong to you. Pass-through costs are never marked up into our fee.

### How phases change

Billing steps down automatically as your property succeeds. Pre-Open ends at initial lease-up and steps down to Open & Leased. If a suite later opens up, you tell us and the property enters the Re-Leasing phase; the month after that suite is leased, it automatically returns to Open & Leased billing. Phase changes are confirmed in writing (email is fine), take effect on the next billing cycle, and never require a new signature.

### More than one property?

Everything in this guide is per property: onboarding, intake, ad budget, and reporting each run per property. Multi-property owners also get a **consolidated portfolio report** so you can see all your properties on one page.

Rates shown are TAG's standard published rates at the time of writing. Your signed agreement is the source of truth for your pricing, commitment term, and any credits; if this page and your agreement differ, the agreement controls.

# 3 YOUR FIRST SIX WEEKS.

This is the Activation build, week by week. Each row shows what TAG does, what we need from you, and what "done" means before we move on.

| WHEN | TAG DOES | YOU DO | DONE WHEN |
|---|---|---|---|
| **Day 0**<br>signature day | Jessica sends your welcome email and this packet. Zach sends the access checklist, the how-to guides, and both intake forms (pre-filled with what we already know). Kickoff scheduled for days 3–5. | Pick your one decision-maker. Start the two forms; they auto-save. | Kickoff on the calendar. |
| **Week 1**<br>foundation | Your TAG Google Workspace client folder created. Google Business Profile claimed or created. Domain checked, analytics and tracking scaffolded, your PM software or CRM mapped for lead flow. Jessica runs the 60-minute kickoff: property walk-through, goals in leasing terms, lead-handling commitments, and communication norms, with a written recap within 24 hours. | Complete both forms and grant platform access **by day 7**. Send photos or renderings, floor plans, asking rents, and any existing brand assets. | Access complete, intake complete, kickoff recap approved. |
| **Week 2**<br>brand + build | Jessica presents 2–3 brand concepts (name, logo, palette, voice); two revision rounds included. Zach creates social profiles under your ownership, submits local listings, and tests lead routing into your inbox or PM software end to end. | Consolidate brand feedback within 5 business days, through your decision-maker. | Brand approved; socials and listings live; a test lead reaches you and we both see it. |

**The day-7 access rule.** Access is the single most common thing that delays a launch, so we say it plainly: we need your platform access by day 7, and **each day access slips, launch slips with it**. The four how-to guides make every grant a five-minute job, and if you get stuck, book 15 minutes with Zach and do it together on a screen share.

## 3 YOUR FIRST SIX WEEKS, CONTINUED.

| WHEN | TAG DOES | YOU DO | DONE WHEN |
|---|---|---|---|
| **Week 3** content + campaigns staged | Jessica delivers your first 30-day content calendar for review. Zach sets up Google and Meta ad accounts under your billing, builds the first campaigns, drafts your first Facebook Marketplace unit listings, and sets email templates. Everything passes the pre-launch checklist on page 10. | Confirm your ad billing (the $500/mo minimum per property, on your card, in your accounts). Review the content calendar within 5 business days. Confirm who answers leads. | Pre-launch checklist passed end to end. |
| **Week 4** launch | Ads and Marketplace listings go live, against the coming-soon page if the full site is not done yet. Your first weekly snapshot email goes out and your dashboard link is shared. | Answer the first leads within one business day and log the outcomes. | Spend live, leads arriving, data validated. |
| **Weeks 5–6** site launch + rhythm | Your custom leasing website launches (mobile, forms, notifications, and speed all QA'd), campaigns repoint to it, and the SEO and AI-visibility baseline is set. Jessica runs a 45-minute launch review: results so far, baselines against the KPI ladder, and the ongoing rhythm confirmed. | Attend the launch review; confirm the monthly cadence works for your calendar. | Site live, campaigns repointed, steady-state rhythm begins. |

### You will see value before the site launches

Six weeks is a real build, and we do not ask you to take it on faith. These are commitments, not hopes:

→ **Week 1:** your Google Business Profile is live or claimed, and a coming-soon page with lead capture is collecting interested tenants.

→ **Week 2:** you are looking at 2–3 real brand concepts for your property.

→ **Week 4:** paid campaigns and Marketplace listings are generating inquiries, before the full site ships.

> If your property has existing accounts or a website, week 1 also includes an audit of what is already there; anything worth keeping is kept, and tracking gets rebuilt clean either way.

# 4 WHAT WE NEED FROM YOU, & WHEN.

For each row, you are in one of three lanes: **you have it** (grant us delegated access using the matching how-to guide), **you don't have it** (TAG creates it in your name, and you own it from day one), or **not applicable** (skip it and tell us). Most new developments are mostly the middle lane; that is normal and costs you nothing extra.

| ASSET | YOU HAVE IT → DELEGATE ACCESS | YOU DON'T → TAG CREATES IT, YOU OWN IT |
|---|---|---|
| **Website, domain, DNS, hosting** | Use the Website & Domain guide: WordPress admin user, registrar delegate access. | We register the domain in your name and build the site fresh. |
| **Google Analytics, Tag Manager, Search Console** | Use the Google guide: add our email at property level. | We build tracking clean from day one, under your Google account. |
| **Google Business Profile** | Use the Google guide: add us as Manager. | We create or claim the profile for your property in week 1. |
| **Ad accounts + billing** | Use the Google and Meta guides; billing stays on your card. | We create accounts under your billing; you approve the card yourself. |
| **Social profiles** | Use the Meta and LinkedIn guides for partner and admin access. | We create profiles under your ownership in week 2. |
| **CRM, PM software, tenant portal** | Tell us which (Buildium, AppFolio, Innago, other) and who administers it; we integrate lead flow. | Leads route to your email until you choose one; we can advise. |
| **Customer / prospect lists** | Share only lists with documented marketing permission. | We build your interest list from scratch via lead capture. |
| **Past reports, competitor knowledge** | Drop anything you have in your client folder; it sharpens strategy. | We run our own market and competitor review either way. |
| **Photos, renderings, floor plans, rent roll** | Upload to your client folder in week 1; this one is always your lane. | No substitute exists; if photography is needed we coordinate it (billed a la carte). |

**Ownership guarantee.** Your accounts, your domain, and your data are yours, always. TAG is added as a manager, never the owner, and access is returned or relinquished if we ever part ways.

**Security:** never send passwords by email. Every grant above works through delegated access, which is exactly what the four how-to guides walk you through.

# 5 TWO SHORT FORMS.

Everything else we need lives in two online forms. Each takes about **10 minutes**, auto-saves as you go (phone-friendly, fill them from the job site), and Jessica pre-fills whatever she already learned in the sales process, so you are mostly confirming, not typing.

FORM 1 · ONCE PER CLIENT

**BUSINESS & BRAND INTAKE.**

Your company and contacts, goals, brand preferences, current tools, and access confirmations.

https://docs.google.com/forms/d/e/1FAIpQLSfFQgaQ15v44ojRlevgLwoBd58cqy4mPoDHru6b8hlu6DN1DA/viewform

FORM 2 · ONCE PER PROPERTY

**PROPERTY PROFILE.**

Address, unit mix, sizes, rates, availability, ideal tenants, brokers, and showing process. Fill one per property; it doubles as input for your website copy.

https://docs.google.com/forms/d/e/1FAIpQLSe8hWMMvDAcOVyEDWGe9FwTZi28BqwSvTudw1UNAG8j9YJUUQ/viewform

Both are due with access by day 7. Anything you would rather say than type, save for the kickoff call; owners talk better than they type, and we take notes.

# 6 WHEN THE LEADS ARRIVE.

Marketing gets prospects to raise their hand; leasing them is a team sport. Here is the honest split.

### How leads flow

Every inquiry, whether from your website form, a phone call, an ad, or a Facebook Marketplace message, lands in one pipeline: it reaches your inbox or your PM software the moment it arrives, and it is logged in a **shared lead tracker** that both you and TAG can see. Nothing depends on someone remembering to forward an email.

### Your commitment, in one sentence

**Respond to leasing inquiries within one business day, and log the outcome in the tracker.** In a lease-up, the fastest way to waste a lead is not calling it back. We can make the phone ring; only you can answer it.

The tracker keeps everyone honest in both directions: you see exactly what our campaigns produce, and we see response times and outcomes, so the monthly numbers reflect reality, not guesswork. If lead response needs a different owner on your side (an on-site manager, a broker), name them at kickoff.

# 7 HOW WE WORK TOGETHER.

### The rhythm

| TOUCHPOINT | WHAT HAPPENS | CADENCE |
|---|---|---|
| **Snapshot email** | Short written update: done, next, what we need from you, and a numbers snapshot. | Weekly during activation |
| **Performance call, 60 min** | First 30 minutes: analytics, what the numbers say. Last 30 minutes: strategy, what we do about it. | Monthly |
| **Extended strategy review** | Goals, budget, market changes, and a phase check: is it time to step your property down a phase? | Quarterly |
| **Urgent items** | Call or email Jessica directly; urgent means leads stopped, site down, or spend anomaly. | As needed |

### One source of truth

Your **TAG Google Workspace client folder** is where files, approvals, plans, and due dates live. If a decision or asset is not in the folder, it is not final. You get the folder link on day 0; bookmark it.

### Content calendars

We build your content **30 days at a time**. Each month you receive the next 30-day calendar, reviewed together on the monthly call, and you get a **5-business-day revision window** on the overall plan. After 5 business days, silence is approval and we publish on schedule, so your feet are never held to a daily approval treadmill.

### Approvals, with real numbers

| STAGE | WHO | TURNAROUND |
|---|---|---|
| **Draft** · consolidated feedback from your decision-maker | You | 2 business days |
| **Revision** · updated version delivered | TAG | 2 business days |
| **Final** · written approval (email or folder comment) | You | 1 business day |

Two revision rounds are included on planned content and brand work. When requesting changes, name the business reason, consolidate all stakeholders' comments into one pass, and flag factual or legal corrections separately from preferences; those always jump the queue.

Day to day, both sides acknowledge messages **within one business day**. Meetings come with an agenda in advance and a written recap after.

# **8** HOW WE MEASURE.

We report in leasing terms, on a ladder from what pays your mortgage down to the early signals that predict it.

| LEVEL | WHAT IT ANSWERS | YOUR METRICS |
|---|---|---|
| **Business** | Is the property filling? | Signed leases, occupancy, leased square feet, time-to-lease |
| **Conversion** | Are prospects acting? | Qualified tour requests, phone calls, form fills, Marketplace inquiries |
| **Efficiency** | Is the budget working? | Cost per lead, cost per signed lease |
| **Leading** | What is coming next? | Business Profile views, site traffic, listing impressions, click-through rate |

**Set your clock honestly:** ads and Marketplace listings produce leads in **weeks**; SEO and AI visibility compound over **3–6 months**. Both are on the plan; they just pay out on different schedules, and we will never point at a slow channel to excuse a fast one.

PLAIN-LANGUAGE GLOSSARY · THE ACRONYMS WE WILL USE AROUND YOU

**GBP** · Google Business Profile: your property's listing on Google Search and Maps, with photos, hours, and reviews.

**SEO** · Search engine optimization: making your site show up when tenants google "flex space near me."

**CPC** · Cost per click: what one click on your ad costs.

**CPL** · Cost per lead: total ad spend divided by leads produced. The efficiency number we watch hardest.

**CTR** · Click-through rate: of the people who saw your ad or listing, the share who clicked it.

**ROAS** · Return on ad spend: revenue attributable to ads divided by what the ads cost.

**Impressions** · How many times your ad or listing was shown, whether or not anyone clicked.

**Conversion** · A visitor doing the thing we wanted: filling the form, calling, booking a tour.

**CRM** · Customer relationship management software: where leads, contacts, and follow-ups are tracked.

**DNS** · Domain name system: the settings that point your web address at your website and email. Touched during setup, then left alone.

Reporting principles: we agree on definitions before comparing numbers across platforms, your lead tracker is the primary source for lead quality, and every report ends in decisions: what happened, why it matters, what happens next.

# 9 BEFORE ANYTHING GOES LIVE.

Nothing launches until every line below passes. This is the week-3 quality gate, shared so you know exactly what "ready" means.

→ Lead capture and notifications tested end to end: a test inquiry reaches your inbox or PM software, and the tracker.

→ Mobile and desktop experiences reviewed; most tenants will find you on a phone.

→ Campaign names, dates, budgets, locations, and audiences verified against the plan.

→ Tracking, pixels, consent settings, and the dashboard validated.

→ Creative, copy, links, rates, permitted-use language, and landing pages approved by you.

→ Your leasing contact is ready to answer inquiries within one business day.

→ Pause and escalation owners documented: who turns what off, and who calls whom.

### Your next steps, in order

1. **Schedule the kickoff call** for days 3–5; Jessica's booking link is in your welcome email.
2. **Complete both intake forms** (Section 5); they auto-save, about 10 minutes each.
3. **Grant platform access by day 7** using the four how-to guides below; stuck anywhere, book 15 minutes with Zach and share your screen.

### The four how-to guides in your packet

| GUIDE | COVERS |
|---|---|
| **Google Access** | Business Profile manager, Analytics (GA4) property access, Google Ads access |
| **Meta Access** | Facebook and Instagram partner access, and how Facebook Marketplace really works |
| **Website & Domain Access** | WordPress admin user, registrar delegate access, hosting, DNS records |
| **LinkedIn Access** | Company Page admin and Campaign Manager access |

# LET'S GO.

Sign below to confirm you have read this guide and named your decision-maker. This acknowledgment supports onboarding and does not replace your signed agreement; if the two differ, the agreement controls.

**CLIENT**

SIGNATURE

NAME & TITLE

DESIGNATED DECISION-MAKER

DATE

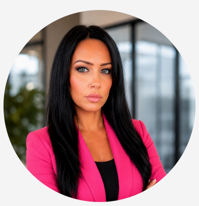
**TENANT ACQUISITION GROUP**

SIGNATURE

NAME & TITLE · JESSICA JOHNSON, OWNER & CEO

KICKOFF DATE

DATE




**JESSICA JOHNSON.**

**Owner & CEO, Tenant Acquisition Group**

jessica@tenantacquisitiongroup.com · (904) 713-5511

tenantacquisitiongroup.com


BOOK YOUR KICKOFF →

Questions before the kickoff? Email or call Jessica any time. We are glad you are here, and we are already working on your property.

**TAG**

WE BUILD LEASING MACHINES.