Introduction to Freelance Digital Marketing

- Campaign skills aren't enough — operations protect your income
- Lifecycle: onboarding → access setup → execution → reporting → handover
- Common failures: shared passwords, vague scope, missed reports, messy exits
- 14 sessions: contracting, access, QA, reporting, privacy, offboarding, tools, resilience
- Outcome: a personal delivery playbook and reusable checklists per stage



Scoping and Contracting for Delivery

- Define scope by channel, deliverable type, and frequency
- Name explicit exclusions: e.g., “Meta Ads excluding Instagram Reels”
- State client duties: access, assets, approval windows, named approvers
- Use change orders: written request, quoted impact, approval first
- Avoid traps: new channels, revision loops, ad spend on your card



Client Access and Permission Management

- Least privilege: grant only the access the scope requires
- Delegate natively: Google Ads manager link with Standard access, Meta Business partner access, GA4 property roles
- No shared logins; use individual accounts, password managers, and 2FA
- Keep an access register: who, what asset, which role, expiry date
- Client keeps Admin ownership; never hold sole admin control



Access Handoffs: Platform Nuances

- Google Ads: manager account link grants campaign access, not billing or admin ownership
- Standard access allows campaign changes but blocks user administration
- Flag single-admin accounts: tags and access can vanish with that user
- Log the exact role and revocation point for Meta, GA4, GTM, Search Console
- Client owns the container; freelancer gets access — never the reverse



Google Ads	Meta	GA4	GTM	Search Console	Business Profile
Granted role	Granted role	Granted role	Granted role	Granted role	Granted role
Revocation point	Revocation point	Revocation point	Revocation point	Revocation point	Revocation point

Campaign Delivery Operations

- Build a per-channel delivery checklist; every launch follows the same sequence
- Organize work by deliverable and approval state, not by conversation thread
- Set one primary channel per client; pin response times and escalation paths
- Track capacity against active clients; prioritize by urgency versus impact
- Keep version control for creative and documentation across all accounts



Pre-Launch QA and Post-Launch Verification

Check thoroughly. Launch with confidence.

Pre-launch QA: structure, budget level and value, dates, timezone, targeting, creative, naming, approvals

Tracking QA: final URLs resolve, UTMs follow taxonomy, pixels fire, conversions deduplicated

Post-launch checks (24–72 hours): delivery status, rejected ads, spend pacing, analytics receipt

Silent errors: wrong timezone start date, budget at wrong level, missing tracking parameters

Separate must-check items from nice-to-check so launch is never delayed



Reporting That Clients Trust

- Match cadence and format to the client's decision cycle: live dashboard vs. monthly narrative
- Lead with outcomes, then channel diagnostics, then activity — never activity first
- Agree metric definitions in writing before the first report
- Write a concise narrative: what happened, why, and what's next
- Underperformance: data, named causes, and a specific next-period plan



Reporting Templates and KPI Selection

Goal scorecard: 3–5 agreed KPIs with target, actual, prior period, variance, status

Channel sections: headline metric, 2–4 supporting metrics, trend context, one paragraph commentary

Demote vanity metrics: impressions, reach, likes explain results but are not the verdict

Disclose data limitations: attribution windows, modeled conversions, CRM export dates

Use absolute values beside percentages, and define every metric in writing



Close with 3–5 next actions, each with one owner and a due date

Data Privacy and Confidentiality Obligations

- Client data you touch: CRM exports, audience lists, analytics, platform access
- You're a processor on client instructions; a controller when you set the purpose
- Build five artifacts: privacy notice, DPA, processing record, incident runbook, DSR workflow
- Platform data-use rules and consent apply even to solo operators
- Secure storage and deletion; notify breaches within 72 hours



Offboarding and Handover

1. Confirm end date, final scope, notice, and transition support in writing early
2. Handover package: source files, reporting history, campaign docs, SOPs, open issues, access inventory
3. Transfer account ownership first; have the client log in and confirm access without you
4. Revoke your access platform by platform from the access register; remove client from your systems
5. Close the loop: final report, final invoice, written handover acceptance, retrospective for your SOPs



Tools and Automation for Solo Operators

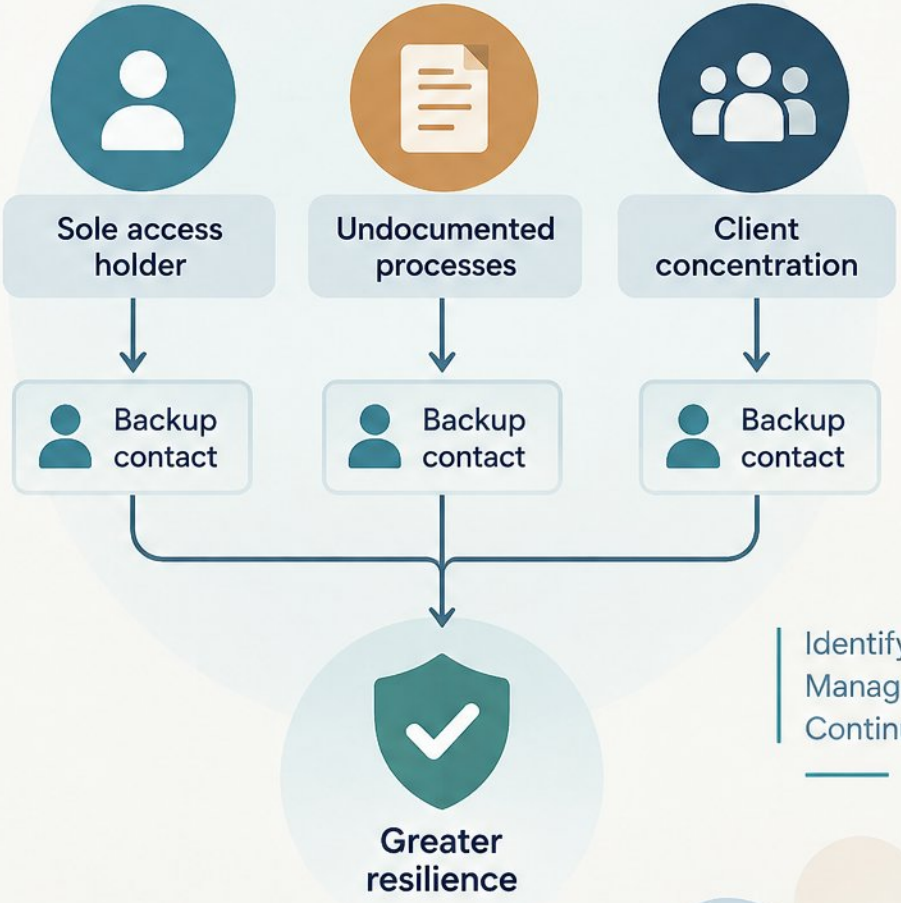
- Core stack: access, project management, reporting, storage, communication
- Choose tools that scale across clients without per-client pricing
- Automate scheduled reports, budget alerts, and approval workflows
- Prefer client-compatible systems; your own tooling complicates offboarding
- Avoid tool sprawl: every tool should serve every client



SIMPLER TOOLS. STRONGER BUSINESS.

Risk Management and Business Continuity

- Map single points of failure: sole access holder, undocumented processes, client concentration
- Keep a written continuity note: backup contact, access backup, outage and illness cover
- Carry professional liability (E&O), general liability, and cyber cover where you hold access
- Contracts shift some risk, not all — performance guarantees are generally uninsurable
- Protect reputation with written decisions, early escalation, calm structured conflict handling



Capstone: Building Your Delivery Playbook

- Assemble one playbook covering access, delivery, reporting, and handover
- Convert session checklists and templates into reusable client-facing assets
- Self-assess against lifecycle stages and rate operational maturity
- Standardize first; automate what is proven and repeatable
- Get peer or mentor review before the next client engagement



Action Plan and Next Steps



One source of truth for status, deadlines, and payment state

Standardize onboarding and offboarding; every engagement starts and ends the same way

Weekly 30-minute client review to catch blocked work and at-risk deadlines

Define your maximum active client count and defend it

Revisit the playbook whenever tracking, scope, or client systems change

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