CLIENT RESOURCE

Adtechlo Client Onboarding Guide

Everything you need to know before we build and launch your lead generation system.

OUR GOAL	YOUR ROLE
Build a measurable lead generation system designed around your offer, market and sales process.	Give us accurate business information, timely access and fast feedback so we can execute efficiently.

Performance-based lead generation. Built around measurable results.

Please complete the onboarding carefully. The information you provide becomes the foundation for your campaign strategy, funnel, targeting and lead qualification.

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HOW IT WORKS

Your onboarding process

Our onboarding is designed to give Adtechlo the information required to understand your business before campaign preparation begins.

01	**Business**	Company, market, service area and primary contact.
02	**Offer**	What we promote, pricing, deal value and capacity.
03	**Ideal Customer**	Target audience, problems, motivations and qualification criteria.
04	**Sales Process**	Lead handling, follow-up, close process and deal tracking.
05	**Access**	Advertising, analytics, website, CRM and communication platforms.
06	**Review**	Final confirmation before we prepare the next steps.

What happens after submission?

Our team reviews the information, identifies any missing items and prepares the campaign setup. If additional access or clarification is required, we contact your designated primary contact directly.

Important: submitting onboarding does not mean campaigns go live immediately. Launch timing depends on the agreed scope, account access, tracking setup, creative preparation and final approvals.

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PREPARATION

What we need from you

The quality of the setup depends heavily on the accuracy of the information and access we receive. These four areas have the biggest impact on a smooth launch.

Accurate business information

Tell us exactly what you sell, where you operate, your typical pricing and which services should or should not be promoted.

Clear qualification criteria

Define what a valuable lead looks like and which prospects should be excluded. We use this to shape forms, messaging and campaign strategy.

Fast account access

Provide access through official user, partner or account invitation methods. Never send passwords through the onboarding form.

A responsive sales process

New leads lose value quickly. Your team should have a clear owner, a fast first response and a consistent follow-up process.

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ACCOUNT ACCESS

Access & security

We may need access to some of your existing platforms to build tracking, campaigns and integrations. Access requirements depend on your setup.

Platform	Typical access purpose
Meta Business / Ads	Campaign setup, ad account access, Pixel/Dataset and conversion tracking.
Google Ads	Campaign setup, conversion actions and account-level measurement.
GA4 / Google Tag Manager	Analytics, events, conversion tracking and troubleshooting.
Website / CMS	Landing page implementation, forms, scripts and tracking installation.
CRM / Lead Management	Lead delivery, status tracking, attribution and closed-deal reporting.
WhatsApp / Booking Tools	Lead routing, notifications or appointment workflows when required.

Security rule

Do not send passwords through the onboarding form, email or chat. Whenever possible, grant access using the platform's official partner, manager, collaborator or user invitation feature. If a temporary website user is required, create a separate account that can be removed later.

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LEAD HANDLING

How to get more value from every lead

Adtechlo can generate and qualify opportunities, but the client's sales process determines whether those opportunities become revenue.

Respond quickly

Assign a clear person to new leads and make first contact as quickly as your operation allows.

Use multiple follow-ups

A lead that does not answer the first call is not automatically lost. Use an agreed sequence across phone, email, SMS or WhatsApp where appropriate.

Update lead status

Keep each lead's status current so campaign quality and revenue attribution can be evaluated.

Share feedback

Tell us which leads are strong, weak or unqualified. That feedback helps improve targeting, qualification and messaging.

Suggested status flow

NEW LEAD	CONTACTED	QUALIFIED	APPOINTMENT	WON / LOST

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TRACKING

Lead & deal tracking

Because our partnership is performance-based, transparent attribution is essential. We need to be able to follow an Adtechlo-generated lead through the sales process and identify the final outcome.

What should be tracked

Data point	Why it matters
Lead source / ID	Identifies that the opportunity originated from an Adtechlo campaign or funnel.
Contact information	Allows the original lead to be matched to a later customer record.
Lead status	Shows progression from new lead to qualified, won or lost.
Deal value	Provides the value of the completed customer transaction.
Closed date	Establishes when the deal was completed.
Outcome / reason lost	Helps improve campaign quality and identify sales-process issues.

Closed-deal definition

The exact event that counts as a closed deal - for example, a signed agreement, paid deposit or completed payment - should be defined in the commercial agreement between Adtechlo and the client. The onboarding form helps us understand your sales process; it does not replace the signed agreement.

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WORKING TOGETHER

Communication & next steps

A successful performance partnership works best when both sides have clear responsibilities and communicate quickly.

ADTECHLO	CLIENT
Campaign strategy	Accurate onboarding information
Landing page / funnel setup	Required account access
Tracking implementation	Fast lead response
Lead generation and optimization	Sales-status updates
Performance feedback	Timely approvals and feedback

After you complete onboarding

1. We review your submission and identify any missing information.
2. We confirm the access and integrations required for your setup.
3. We prepare the campaign, funnel, tracking and lead-delivery structure.
4. We request any final approvals required before launch.

Ready to get started?

Complete your Adtechlo onboarding and provide as much accurate detail as possible. We'll use it to prepare the next steps for your lead generation system.

ADTECHLO
Performance-based lead generation

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