

KNOW WHAT YOU OWN AND HOW TO GET IN

Keep Control of Your Website and Marketing Accounts

Whether you're hiring your first marketing company or switching providers, get the accounts and handoff details clear before work starts. Your business shouldn't depend on someone else's personal login.

Keep owner access

Use this before moving to the next step.

Use named users

Use this before moving to the next step.

Plan the handoff

Use this before moving to the next step.

Who controls each account?

Record account names and access roles, not passwords. Store recovery codes in your business password manager.

ACCOUNT	BUSINESS OWNER/ADMIN	PROVIDER ACCESS	RECOVERY CHECKED?
Domain registrar: your web address			
Website hosting and source files			
Business email			
Google Business Profile			
Google Search Console and Analytics			
Ads accounts and billing			
Forms, booking, and lead notifications			
Social accounts and photo licenses			

Ask these questions before paying

Get the answers in writing, alongside the price and scope.

- ☐ Does the business own the domain, site, content, and custom design? What licenses are rented?
- ☐ Will our business have the appropriate owner/admin access from the start?
- ☐ Who pays for hosting, software, renewals, and advertising? What continues if we cancel?
- ☐ What work happens each month, and how will the report connect it to useful outcomes?
- ☐ What is the notice period and handoff process? Are there transfer or export costs?
- ☐ Can we get a usable site backup, source files where applicable, and our content and images?
- ☐ Will the provider use their own user account rather than sharing the owner password?

Leave with a working setup

Confirm these before removing the old provider's access. Don't disconnect accounts or email just to start fresh.

- ☐ Confirm current backups and who will keep the site running.
- ☐ Check the domain renewal, email, hosting, and form notifications.
- ☐ Transfer the right owner/admin roles and test business access.
- ☐ Confirm how phone numbers, booking tools, analytics, and paid campaigns will continue.
- ☐ List any pages or links that need redirects before changing website addresses.
- ☐ Test the live site, phone links, and a real form submission after the move.
- ☐ Remove unneeded access only after the replacement setup works.
- ☐ Keep two-factor authentication and recovery details under business control.