// ACCESS AUDIT

Marketing account ownership checklist

Tick what you can verify today. Leave uncertain items blank, write the current owner beside them and resolve the highest-risk access first.

Business: _____

Checked by: _____

Date: _____

Domain, DNS and business email

These accounts control where your website and email point.

- [ ] The business is the registrant for every domain name.
- [ ] A business-controlled email has registrar and DNS administrator access.
- [ ] Renewal billing, expiry dates and recovery details are recorded.
- [ ] Two-factor authentication recovery belongs to the business, not one contractor.

Current owner or next action: _____

Website, hosting and content

You need a route to move or restore the website if a supplier changes.

- [ ] The business can sign in to hosting, the CMS and any ecommerce account.
- [ ] A current backup can be exported without the current agency.
- [ ] The contract states who owns copy, design files, code and paid plugins.
- [ ] Renewal costs and licence dependencies are listed in one place.

Current owner or next action: _____

Google business and measurement

Access should survive a change of agency or staff member.

- [ ] The business has owner access to its Google Business Profile.
- [ ] A business-controlled user has administrative access to Google Ads.
- [ ] The business can access Google Analytics, Tag Manager and Search Console.
- [ ] Conversion actions, call-tracking numbers and reporting definitions are documented.

Current owner or next action: _____

Leads, phone numbers and customer data

Customer history and public contact numbers need a clear export and transfer path.

- [ ] The business can export contacts, leads, jobs and communication history.
- [ ] Ownership and porting rights are known for every tracking phone number.
- [ ] ServiceM8, GoHighLevel or another CRM has a business administrator.
- [ ] Forms, inboxes, automations and webhook destinations are listed.

Current owner or next action: _____

Social, creative and advertising assets

Agency access is normal. The business should still retain an owner-level route in.

- [ ] The business controls the Meta Business Portfolio and core social profiles.
- [ ] Ad accounts, pixels, audiences and product catalogues are named and recorded.
- [ ] Editable logos, brand files, photos and approved ad creative can be downloaded.
- [ ] Usage rights are clear for fonts, stock assets, photography and video.

Current owner or next action: _____

Security, billing and handover

Good ownership includes safe access, not a shared spreadsheet of passwords.

- [ ] Named users have their own login and the minimum access needed for their work.
- [ ] Two-factor authentication is on, with recovery codes stored securely.
- [ ] Subscription owner, payment method, notice period and cancellation steps are recorded.
- [ ] The agreement includes an export and handover process if the relationship ends.

Current owner or next action: _____