

# Artist Onboarding Checklist

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Use this checklist whenever you sign a new artist. The goal: collect everything you need to manage the artist, get full visibility into their assets and accounts, and avoid being blocked later because you're missing a login or a contract. Store everything in a secure shared vault (password manager + cloud drive). **Never store passwords in plain text or in chat.**

Artist: \_\_\_\_\_ Date started: \_\_\_\_\_ Manager/Owner: \_\_\_\_\_

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## 1. Legal & Contact Info

- ☐ Full legal name
- ☐ Professional / stage name (and any alternate spellings)
- ☐ Date of birth (note if minor — triggers extra contract/work rules)
- ☐ Mailing address
- ☐ Primary phone + email
- ☐ Emergency contact
- ☐ Government photo ID (copy)
- ☐ Tax ID — SSN or EIN (collect securely; needed for W-9 / payouts)
- ☐ Completed W-9 (or W-8 for non-US artists)
- ☐ Work eligibility / visa status (for touring across borders)
- ☐ Signed management agreement (executed copy filed)
- ☐ Existing business entity? (LLC/corp name, state, EIN) or note "individual"

## 2. Brand, Bio & Assets

- ☐ One-line artist description / positioning statement
- ☐ Short bio (100 words) and long bio (300+ words)
- ☐ High-res press photos (with photographer credit + usage rights)
- ☐

Logo files (vector + PNG, light/dark)

☐

Official artist fonts / color palette (if any)

☐

Cover art and existing release artwork (source files where possible)

☐

Press quotes / past coverage links

☐

EPK (electronic press kit) — existing or note “to build”

☐

Pronunciation guide for the artist name

☐

Confirm name/brand trademark status (registered? clear to use?)

### 3. Social Media Accounts (logins/admin access)

For each: handle, login email, password (in vault), 2FA recovery, admin/role access for the team. - [ ]

Instagram - [ ] TikTok - [ ] YouTube (channel + brand account ownership) - [ ] X / Twitter - [ ] Facebook

page + Business Manager / Meta Business Suite access - [ ] Threads / Bluesky (if used) - [ ]

SoundCloud - [ ] Twitch (if streaming) - [ ] LinkedIn (if relevant) - [ ] Discord / community server (admin)

- [ ] Linktree / bio-link tool - [ ] **Laylo** (or other drop/RSVP tool) — admin access - [ ] Confirm you are added as admin/editor (not just given the password) where the platform supports roles

### 4. DSP / Streaming Profiles (access & claims)

☐

Spotify for Artists — claimed, you added as Admin

☐

Apple Music for Artists — access

☐

YouTube Music / Official Artist Channel — verified & linked

☐

Amazon Music for Artists

☐

Deezer / Tidal / Pandora (AMP) profiles — access

☐

Beatport artist profile (key for house/tech-house) — access

☐

Bandcamp (if used)

☐

Audiomack / SoundCloud Pro (if used)

☐

Confirm all profiles point to the correct, single canonical artist page (no duplicates)

### 5. Distribution & Label

☐

Current distributor (e.g., DistroKid, TuneCore, CD Baby, Symphonic, UnitedMasters, AWAL, label) — login/access

☐

Distribution account email + payout method on file

☐

List of all live releases (with ISRCs and UPCs)

☐

Any existing label deals (copies of contracts — see §8)

☐

Release calendar / upcoming scheduled releases

☐

Pre-save / smart-link tool access (Feature.fm, ToneDen, etc.)

☐

Content ID status (is audio monetized/claimed on YouTube? via whom?)

## 6. Publishing, PROs & Royalty Registrations (US)

☐

Performing Rights Org affiliation: **ASCAP** / **BMI** / **SESAC** (which one? login)

☐

IPI/CAE number(s)

☐

Songwriter vs. publisher splits documented per song

☐

Publishing entity / admin publisher (if any) — name + access

☐

**The MLC** registration (mechanical royalties from US streaming) — access

☐

**SoundExchange** registration (digital performance royalties for the recording) — both as performer and rights owner where applicable

☐

Songtrust / publishing admin (if used) — access

☐

Master ownership confirmed per release (who owns each master?)

☐

Split sheets on file for every co-written / co-produced track

☐

Producer agreements / beat licenses for any tracks built on third-party production

## 7. Catalog: Masters, Stems & Metadata

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Inventory of all finished masters (WAV/FLAC) with file locations

☐

Stems / project files (DAW sessions) for key tracks — backed up

☐

Unreleased / demo inventory (rough list + status)

☐

Acapellas / instrumentals available for sync or edits

☐

Consistent metadata (artist name spelling, featured credits, writer credits)

☐

Backup confirmed in at least two locations (cloud + drive)

## 8. Existing Contracts & Obligations

☐

Recording / label agreements

☐

Distribution agreement

☐

Publishing / admin agreement

☐

Producer / co-writer / collaborator agreements

☐

Booking agency agreement (if any)

☐

Prior management agreement (and confirm it's terminated / sunset terms)

☐

Brand / sponsorship deals

☐

Sample clearances / outstanding clearance issues

☐

Any debts, advances owed, or recoupable balances

☐

Any pending legal disputes

## 9. Live / Booking

☐

Current booking agent (if any) + contact

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Past show history (venues, dates, fees, draw)

☐

Tech rider & hospitality rider (or note "to build")

☐

Stage plot / input list (for live acts)

☐

DJ logistics: USB/CDJ vs. controller, key software, backline needs

☐

Performance fee range / current asking price

☐

Availability calendar access

☐

Travel preferences & constraints (visas, party size)

## 10. Financial Setup

- ☐ Dedicated artist business bank account (or plan to open)
- ☐ Payout method for distributor/PRO/booking (account on file)
- ☐ Bookkeeping system (spreadsheet or software) started
- ☐ Commission payment mechanics agreed (who collects, when paid)
- ☐ Expense pre-approval threshold set
- ☐ Invoicing template for shows/brand deals
- ☐ Tax setup: who handles 1099s, quarterly estimates, accountant contact

## 11. Goals & Strategy

- ☐ 12-month goals (releases, streams, shows, followers, revenue)
- ☐ Long-term vision (where does the artist want to be in 3 years?)
- ☐ Target lane / scene / comparable artists
- ☐ What success looks like to the artist (define explicitly)
- ☐ Hard “no” list (things the artist won’t do)
- ☐ Decision-making preferences (how involved, response-time expectations)
- ☐ Key relationships to build (labels, agents, venues, peers)

## 12. Tools & Systems Access

- ☐ Shared cloud drive folder set up (assets, contracts, finance)
  - ☐ Password vault entries created for all accounts above
  - ☐ Project/task board for the artist (e.g., ClickUp) created
  - ☐ Email forwarding or shared inbox for management correspondence
  - ☐ Analytics access verified across all platforms
  - ☐ Communication channel + cadence agreed (weekly check-in?)
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**Onboarding complete when:** every account has confirmed admin access (not just a password), all contracts are filed, the catalog and registrations are inventoried, finances and goals are documented, and the first 90-day plan is drafted.