

**Resource of the Week | Clear to Launch Healthcare Marketing**

# **PRACTICE ACQUISITION CHECKLIST**

**Website and Marketing Assets**



# WHAT'S INSIDE THIS CHECKLIST

When acquiring a healthcare practice, securing all digital and marketing assets is critical to maintaining continuity, protecting your investment, and launching effectively. This checklist covers six essential categories:

**1 Website Assets**

**2 Email Database**

**3 Social and Online Assets**

**4 Current and Past  
Marketing Assets**

**5 Creative Assets**

**6 Accounts and  
Passwords**

# WEBSITE ASSETS

## Secure full control of the practice's digital home base

- ✔ Primary domain(s) and any alternate domains, redirects, and subdomains
- ✔ Domain registrar details and renewal dates
- ✔ Website hosting provider and admin access
- ✔ CMS access (WordPress, Squarespace, Webflow, etc.)
- ✔ Theme files, custom code, plugins, and licenses
- ✔ Access to landing pages, blog, chat tools, and scheduling widgets
- ✔ Website analytics access (Google Analytics, Search Console, heatmaps)
- ✔ SEO assets: sitemap, robots.txt, metadata, schema, keyword targets, backlink reports
- ✔ Tracking assets: Google Tag Manager, Meta Pixel, call tracking, conversion tracking
- ✔ Copies of all website content, images, videos, downloads, and lead magnets
- ✔ Documentation on site integrations with CRM, PMS, forms, scheduling tools, call tracking, phone/text systems, and email platforms

# EMAIL DATABASE

## Preserve patient relationships and communication infrastructure

- ✓ Full patient/prospect email list export
- ✓ Segmentation lists and tags
- ✓ Consent/opt-in records and unsubscribe lists
- ✓ Email platform access (Mailchimp, Constant Contact, HubSpot, etc.)
- ✓ Historical campaign data: sends, opens, clicks, bounces, unsubscribes
- ✓ Automated sequences/workflows currently running
- ✓ Email templates, branded headers/footers, and reusable modules
- ✓ Signup forms, popups, lead sources, and list growth processes
- ✓ Data dictionary for fields and audience segments
- ✓ Compliance documentation for HIPAA/CAN-SPAM processes where applicable

# SOCIAL AND ONLINE ASSETS

Take ownership of every public-facing digital presence

- ✔ Ownership/admin access to all social profiles
- ✔ Facebook page and Meta Business Manager access
- ✔ Instagram, LinkedIn, TikTok, YouTube, X, Pinterest, and any niche profiles
- ✔ Google Business Profile ownership/admin access
- ✔ Review platform accounts: Google reviews, Yelp, Healthgrades, Zocdoc, Birdeye, etc.
- ✔ Directory listings and citation accounts
- ✔ Access to messaging inboxes, comment moderation tools, and community management tools
- ✔ Social content calendars and post history
- ✔ Performance reports for paid and organic social
- ✔ Any influencer, referral, or local partnership pages/accounts

# CURRENT AND PAST MARKETING ASSETS

Understand what has worked — and what hasn't

- ✓ Current annual and monthly marketing plans
- ✓ Paid media accounts and campaign history (Google Ads, Meta Ads, display, local media)
- ✓ Vendor/agency contracts, scopes, and points of contact
- ✓ Historical lead and appointment performance by channel
- ✓ Previous promotions, offers, seasonal campaigns, and referral programs
- ✓ Marketing calendars, test results, and lessons learned
- ✓ Prior marketing strategies and campaign summaries
- ✓ Budget history by channel
- ✓ Call tracking numbers and attribution setup
- ✓ Print, direct mail, radio, outdoor, event, and local sponsorship materials
- ✓ Reporting dashboards and KPI definitions

# CREATIVE ASSETS

Collect every visual and content building block

- ✔ Logo files in all formats
- ✔ Brand guidelines and style guides
- ✔ Fonts, color palette, icon sets, and graphic elements
- ✔ Photo library, raw photography, stock image licenses
- ✔ Video library, source files, edited versions, and usage rights
- ✔ Ad creatives: static, carousel, video, display, print
- ✔ Brochures, flyers, signage, postcards, and office collateral
- ✔ Presentation templates and internal marketing decks
- ✔ Copy library: headlines, service descriptions, bios, FAQs, ad copy
- ✔ Testimonial assets, before/after assets, and release/consent documentation
- ✔ Editable source files from designers (AI, PSD, INDD, Canva, Figma, etc.)

# ACCOUNTS AND PASSWORDS

Ensure complete and secure credential transfer before closing

- ✔ Master inventory of all marketing-related accounts
- ✔ Named owners/admins for each platform
- ✔ Credential transfer plan and password reset process
- ✔ Shared password manager access
- ✔ Two-factor authentication ownership and backup methods
- ✔ Recovery emails and phone numbers for each platform
- ✔ Billing profiles tied to ad, web, software, and domain accounts
- ✔ API keys, tracking IDs, and integration credentials
- ✔ Confirmation that seller personal emails/phones are removed from recovery/admin roles
- ✔ Confirmation that buyer has verified full admin/owner access before closing

# READY TO LAUNCH?

Clear to Launch helps practices grow through smarter marketing, stronger systems, and clear direction.



## Corbin Burkard

National Marketing Advisor  
Corbin@ClearToLaunch.com

