Tool 04: Marketing-asset ownership inventory

Purpose

Know what you would still have if you stopped paying every vendor tomorrow. Leak 7 (Not owned). Chapter 2, used again in chapter 17 and in "How to hire help without getting burned" near the back of the book.

Inputs

- Every invoice from marketing vendors in the last 12 months.
- Your email inbox (search "domain", "renewal", "invitation", "access").
- The office person, if they handle logins.
- One to two hours, spread over a week if vendors need to answer.

Steps

1. Copy the table below.
2. For each row, log in yourself. Don't take anyone's word for it, including your own.
3. Where you can't log in, ask the vendor in writing: "Show me who's listed as owner." Save the reply.
4. Fill every column. "Don't know" is an answer; write it.
5. Mark each row green (you own it and hold a login), yellow (you own it, but access is inadequate: someone else holds the only login), red (another party owns it) or gray (ownership unknown; find out before anything else). Keep "don't know" apart from "lost".
6. For each red row, write in the last column whether it's a rental you chose on purpose or a dependency you won't accept. For a rental, note what's rented, any exclusivity, the cost, the notice period and what you keep when you leave.
7. Clear gray rows first. Then add your own login and recovery details to each yellow row. Then work on the red rows you marked as dependencies you won't accept, one at a time. A rental you chose stays as it is.
8. Several locations: add a location column, one row per asset per location.

Asset	Where it lives	Who is listed as owner	Who has admin	Who holds the login	Renewal date	What leaves if the vendor leaves	If red: rental by choice, or dependency you won't accept?
Domain name	Registrar (name it)						
Hosting	Host (name it)						
Website files and content	Host or platform				n/a		
Site platform	Vendor platform / rented builder / portable (for example, WordPress on your own hosting)						
Business email	Email provider						
Google Business Profile	Google (Primary owner vs owner vs manager)				n/a		
Bing Places, Apple Business					n/a		
Google Analytics					n/a		
Google Search Console					n/a		
Google Ads account					n/a		
Local Services Ads account					n/a		
Main business phone number	Carrier (name it)						

Asset	Where it lives	Who is listed as owner	Who has admin	Who holds the login	Renewal date	What leaves if the vendor leaves	If red: rental by choice, or dependency you won't accept?
Call-tracking numbers	Tracking vendor (name it)						
Review profiles (Yelp, BBB, Angi, others)							
Social pages					n/a		
Customer list	CRM or spreadsheet						
Photos and video of your work					n/a		

How to read the result

- **Google Business Profile:** being a "manager" is not ownership. You want to be the primary owner, with vendors added as managers you can remove.
- **Call-tracking numbers:** if the vendor owns the numbers printed on your trucks, listings and site, those calls stop or reroute when you leave. Before you sign, get in writing whether each number can be transferred to you or forwarded when you leave. A number in the vendor's own call-tracking account is a contract matter, not something phone-company porting rules settle (chapter 2).
- **Site platform:** a vendor platform or a rented builder can be fine to run on. The question is what you can take with you: the content, the design, the domain, the page addresses. A portable site on hosting you own leaves with you.
- Gray means ownership is unknown; yellow means it's yours but you can't get in on your own; red means another party owns it. A red row you rent on purpose isn't a fault to fix: keep its exit terms on file. A red row that's a dependency you won't accept is the one to work on. A yellow row is one bad breakup away from a lockout.
- A content export isn't a working move. Before you switch, test the pages, forms, phone numbers and email on the new setup.
- A disputed Google Ads or Local Services Ads account: check Google's current help pages for the official route, and keep owner, admin, billing and manager access apart.

Limits

- This tool shows who controls an asset today. It doesn't show what your contract says. Read the contract's ownership and termination sections next to this table.
- Platform labels in our research come from code fingerprints on homepages. They can over- or under-count, and they show the technology, not who owns or controls the account.
- Some assets can't be moved on any platform (a vendor's own proprietary page builder). That's a reason to ask before signing, not proof of bad faith.

When a vendor won't hand it over

Work in this order (chapter 2):

1. **Collect the evidence.** The domain lookup at lookup.icann.org, your role on the Google Business Profile (primary owner, owner or manager), and the account IDs for analytics, Search Console, ads and call tracking.
2. **Request the Google profile yourself,** through Google's request-access route (chapter 2). It doesn't need the domain.
3. **Send the written request** below for the domain, numbers and accounts. Keep a copy.
4. **Set a reply-by date.** My rule: give a reply-by date two weeks out. If they miss it, send the request once more with a new date. If they miss that too, start the new-domain path (chapter 2) while you keep asking.
5. **Before you cancel anything,** test the site, the forms, the business email and the phone, from a phone, the way a homeowner would.

If the profile can't be recovered, use Google's ownership and duplicate-profile support route, not a second profile.

Two domain rules from ICANN's transfer policy (chapter 2):

- If you've paid for the domain, a registrar can't deny the transfer over a payment dispute between itself and a reseller or business partner, which covers an agency that bought it for you through a registrar it resells for.
- A change of registrant brings a 60-day lock on moving to another registrar, unless the registrar offers an opt-out before the change. ICANN has adopted rule changes not yet in force, so check the current policy.

Written request (template)

> Subject: Transfer of [business name] marketing accounts
>
> [Vendor name],

> We're moving our marketing accounts into our own name. By [date], please confirm in writing: 1. Domain [domain]: who is the registrant on record, and the transfer (AuthInfo) code or a change of registrant to [your legal business name]. 2. Google Business Profile: [your email] added as primary owner. 3. Phone and tracking numbers [list them]: which are on our account and which on yours, and whether each can be ported or forwarded to us. 4. Analytics, Search Console and ad accounts: [your email] added as owner or administrator. 5. A copy of our website files and content, call recordings and reports.
>
> Please reply to this email so we have your answer in writing.
>
> [Your name, role, business name, date]

This is a request, not a legal notice. If a lot is at stake, have someone qualified review it.

Next action

- Red rows: chapter 2's exit checklist.
- A vendor won't hand something over: chapter 2, "When the vendor won't hand it over" (domain, Google profile, phone numbers).
- Before signing any new vendor: tool 07, the ownership questions.
- Re-run this inventory twice a year, or whenever something changes (tool 09).

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