

Client Management Workflow Template

Five-stage checklist for retainer agencies. Adapt to your tools and team size.

AGENCY DETAILS

| | |
|---------|--|
| AGENCY: | |
| DATE: | |

STAGE 1: ONBOARDING (WEEKS 1-2)

Sets the tone for everything. Establish expectations before the first deadline.

| | STEP | NOTES / ACTIONS |
|-----|------------------------------------|---|
| [] | Kick-off call | Cover: top goals, communication preferences, response times, request channel, portal walkthrough |
| [] | Access setup | Send portal credentials before call. Confirm: ad accounts, CMS logins, brand assets, integrations |
| [] | Intake workflow setup | Walk client through submitting first ticket during onboarding. Remove friction early |
| [] | First deliverable (within 14 days) | Ship something concrete in the first two weeks -- signals momentum, builds early trust |
| [] | Portal welcome message | Written inside portal (not just email). Confirm how to reach you and what comes next |

STAGE 2: REQUEST INTAKE AND TRIAGE (ONGOING)

The engine of your retainer. If intake is broken, everything downstream is harder.

| | STEP | NOTES / ACTIONS |
|--|------|-----------------|
|--|------|-----------------|

| | | |
|-----|----------------------------------|--|
| [] | All requests through one channel | Portal or ticketing system only. Redirect any off-channel requests politely but consistently |
| [] | Triage on a set schedule | e.g. Every Monday morning -- assign priority, add estimates, assign team. Repeatable, not reactive |
| [] | Client confirmation | Every request gets a ticket number + acknowledgment with estimated move-to-In-Progress date |
| [] | Status visible in portal | Work status lives in portal, not email. Client can see: Queued / In Progress / In Review / Done |
| [] | Scope gate | Flag out-of-scope items BEFORE work starts. Send change request prompt, not a surprise invoice |

STAGE 3: DELIVERY AND REVIEW CYCLE

Keep handoffs clean. Same channel, same thread, clear next steps every time.

| | STEP | NOTES / ACTIONS |
|-----|-------------------------------|--|
| [] | WIP visibility (Kanban board) | Client-visible board: Queued / In Progress / In Review / Complete. Auto-notify on status change |
| [] | Deliver through portal | Attach deliverable with a specific approval request -- not 'let me know what you think' |
| [] | Feedback in ticket thread | All revision notes in the ticket. Keep original request, deliverable, and feedback in one place |
| [] | Ticket closure | On approval: close ticket, log hours, update retainer balance. Client sees updated balance in portal |

STAGE 4: MONTHLY RHYTHM

Keep the relationship proactive. Prevent it from becoming purely transactional.

| | STEP | NOTES / ACTIONS |
|-----|------------------------|--|
| [] | Retainer usage summary | Hours used, tasks completed, hours remaining -- shared proactively, not on request |

| | | |
|--------------------------|---------------------------------|--|
| <input type="checkbox"/> | Monthly report | Results, progress toward goals, priorities for next month. Consistent format every month |
| <input type="checkbox"/> | Optional 30-min check-in | Call or async video for active accounts. Surfaces small frustrations before they escalate |
| <input type="checkbox"/> | Next month priorities | Explicit sign-off on priorities before the month starts. Creates a reference point for scope |

STAGE 5: OFFBOARDING

Clean endings protect your reputation. People remember how a relationship closed.

| | STEP | NOTES / ACTIONS |
|--------------------------|---|--|
| <input type="checkbox"/> | Notice period confirmed | Confirm notice period per contract. Align on last day of work and billing cutoff |
| <input type="checkbox"/> | Final deliverables checklist | Review all in-progress work: what gets finished, what gets handed off, what gets cancelled |
| <input type="checkbox"/> | Access revocation schedule | List all client accounts and tools. Set explicit revocation dates. Confirm in writing |
| <input type="checkbox"/> | Handoff document | One page: work completed, items in progress, pending items, all credentials to transfer |
| <input type="checkbox"/> | Final invoice and reconciliation | Tally hours, reconcile scope, handle unused retainer per contract terms. Close cleanly |
| <input type="checkbox"/> | Exit feedback (optional) | Short email asking what worked and what could be better. 3 sentences is enough |