ScaleTime

CLIENT MANAGEMENT CHECKLIST

For A Smarter,
More Scaleable Agency

Hey, why are client management systems so #%&*ing important anyway?

Because they:

- ✓ Expand business and take on more clients = Mo' Money!

- ✓ Ummm, they pay the bills #keepLightsOn

- ✓ Create a happy customer journey

- ✓ Save the team time, energy and sanity :)

Unreasonable hand holding
Unnecessary undefined expectations
Unproductive team members

...all solved with a deep, professional dive into your client management systems.

Need help? Want to get out of the weeds?
Book a time now.

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Do I really need to systematize all this?

YES! *you'll love me for it later*

Sure, some of these are in your head, or your PMs head, but that makes you the bottleneck - so start downloading your brain so you can scale!

80/20 MUST haves in your client management:

☐ ***Client Roster:*** *Where is the list of active and inactive clients you serve?*

☐ ***Meeting Agenda:*** *Do you have a repeatable agenda that allows for repeatable and consistent meetings across all account managers and consistent cadences?*

☐ ***Meeting Notes:*** *Is there a track record of client convos and takeaways, especially for handoffs? #whoDoneit #whereTheyDoneit*

☐ ***Client FAQs:*** *Do we know what is most often asked and when?*

☐ ***Client Briefs:*** *Can we easily access the who, what, where, how and how often cheat sheet of the client?*

☐ ***Client Surveys:*** *How do you know clients are happy and what should you be optimizing/deleting from service?*

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Very meta: the processes inside client management process:

☐ ***Monthly Reporting:*** *Do you have a template or SaaS? Who is responsible for data gathering/input? What are the defined targets? Who is doing*

☐ ***Client requests:*** *Do you make sure there's a streamlined way to deal with every little request clients have and check against scope so you don't tank profits while keeping clients happy?*

☐ ***Scope Management:*** *Are you tracking hours in an easy way so you can track scope, not burn out the team, distribute workflow and not choke out your profitability?*

☐ ***Approval process:*** *Who is responsible for external reviews of work getting done? How long does review take? How many revisions?*

☐ ***Check Engine Light review:*** *Are you checking client statuses on the regular:*

*****Green:*** *Are they happy as a cucumber, maybe ready for some upsells?*
Yellow: *They are freaking out, cutting or pausing services ?*
Red: *They asked for passwords to FB or Google Manager and said... Bye Felicia*

☐ ***Ongoing wow factor:*** *Is there a customer journey track for education, delights, upselling/cross-selling, off-boarding & refferals?*

Stay informed...

Any new info will: Affect workflow. Affect productivity. Affect your business.

Amazing client management can make or break an engagement.

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