Ascend by Optivation

FREE · 11 TEMPLATES & CHECKLISTS

The Agency Operations Toolkit

The onboarding, scope, retainer, and offboarding templates a small agency actually runs on — ready to use, in one file.

Eleven battle-tested templates for client work:
intake · discovery · scope control · retainers · delivery · handoff · offboarding.

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WHAT'S INSIDE

Eleven templates, one toolkit.

Each template below is the same one published free at optivation.io/resources/tools — collected here so you can print, fill, and reuse them without copying anything out of a web page.

1	**Client Onboarding Checklist** — signed deal to kicked-off project, in five phases.
2	**New Client Questionnaire** — a universal intake set plus branding, web, and retainer sections.
3	**Website Discovery Call Checklist** — eight sections, prep through follow-up.
4	**Scope Change Request Form** — turn "can you just add..." into a signed, dated record.
5	**Scope Creep Tracker** — baseline, change log, and period summary.
6	**Retainer Burn Tracker** — contracted vs used hours, rollover, and overage.
7	**Retainer Renewal Review** — the data pull and agenda most agencies fumble.
8	**Monthly Deliverables Tracker** — one row per deliverable, owner to sign-off to billing.
9	**Client Project Database** — a ready column set for your whole project roster.
10	**Website Project Handoff Checklist** — credentials, training, and the final invoice.
11	**Client Offboarding Checklist** — close out clean, for a future referral.

HOW TO USE THIS TOOLKIT

Print or fill on screen. Checklists have real checkboxes. Form and tracker templates list every field and column, ready to rebuild in a sheet, a doc, or a database.

Take what fits. Not every template suits every engagement. The questionnaire alone has four interchangeable sections — use the universal set plus the one that matches the project.

Make them yours. These are starting points drawn from how small agencies actually run client work. Cut a row, add a phase, change a threshold. The structure is the value, not the wording.

Client Onboarding Checklist

Everything you do between "client says yes" and "project work has started" — commercial confirmation, intake and briefing, project setup, platform access, and the kickoff call that formally opens the engagement. Phases 1–3 happen before the kickoff. Phases 4–5 happen during and after it.

Phase 1 — Commercial confirmation

Complete within 24 hours of signing. Before any work starts, the commercial relationship needs to be airtight.

- [ ] Confirm the scope of work has been agreed in writing — an email confirmation is enough if a formal document isn't your process; what matters is a written record.
- [ ] Confirm the fee, payment structure, and first invoice timing (retainer start date, or project deposit percentage and due date).
- [ ] Issue the first invoice or deposit request; include a clear payment due date.
- [ ] Confirm the cancellation or notice terms have been communicated — even briefly, by email.
- [ ] File all signed or acknowledged documents in the client record (don't leave them only in your inbox).

Phase 2 — Client intake

Where most agencies lose time later. A complete intake now prevents three rounds of clarifying emails mid-project.

- [ ] Send a client intake form covering company name, billing address, and accounts payable contact (separate from the day-to-day project contact).
- [ ] Capture the primary decision-maker and the person who reviews and approves work day-to-day (often different people).
- [ ] Brand assets currently available: logo files and formats, brand guidelines, any existing style references.
- [ ] Current tooling: website platform (CMS), social accounts, analytics setup, any existing tools you'll need access to.
- [ ] Project brief or goals — what does success look like at the end of this engagement?
- [ ] Key dates or hard deadlines from the client's side.
- [ ] Communication preferences: preferred channel, meeting cadence, expected response time.
- [ ] Follow up on any missing intake answers before the kickoff call — don't start a kickoff without a complete intake.
- [ ] Note any red flags from intake answers (vague brief, unclear decision authority, hard deadline with insufficient lead time) in the client record for the kickoff agenda.

Phase 3 — Project setup

Before the kickoff, the team's working environment should be ready. This stops the kickoff devolving into "let me get you access to that."

PROJECT STRUCTURE

- [ ] Create the client record in your project management or client tracking system.

- [ ] Set up the project folder structure (a consistent template saves time: /[Client]/01-Brief /02-Assets /03-Working /04-Deliverables /05-Approved /06-Archive).
- [ ] Assign the account lead and any team members who need to see the client record.
- [ ] Add the key dates from intake to the project timeline.
- [ ] Enter the contracted hours (retainers) or project budget hours into time tracking.
- [ ] Set up the first billing trigger: for retainers, the date the first recurring invoice fires; for projects, a reminder to invoice the next milestone.

ACCESS AND PLATFORMS

- [ ] List every platform you'll need access to for this client, then send the requests — don't wait until you need them.
- [ ] Website CMS admin · Requested · Received · N/A
- [ ] Google Analytics / GA4 · Requested · Received · N/A
- [ ] Google Search Console · Requested · Received · N/A
- [ ] Social media page admin · Requested · Received · N/A
- [ ] Email marketing platform · Requested · Received · N/A
- [ ] Any project collaboration tool the client uses · Requested · Received · N/A
- [ ] Confirm any tools the agency is introducing, and prepare access invites ready to send at kickoff.

INTERNAL BRIEFING

- [ ] Brief the team: who the client is, what they've bought, what the brief says, who the main contact is.
- [ ] Identify any delivery risk visible now (tight deadline, vague brief, unfamiliar domain) and name it to the account lead.

Phase 4 — Kickoff call

The kickoff formally opens the engagement. It is a working meeting that ends with both sides agreeing on exactly what happens next — not a re-sell or a pitch recap.

BEFORE THE CALL

- [ ] Confirm date, time, and participants on both sides (confirm again 24 hours before).
- [ ] Prepare a written kickoff agenda and send it at least 24 hours in advance.
- [ ] Review the intake form once more for anything to clarify in the first 10 minutes.

KICKOFF AGENDA (SUGGESTED 60 MINUTES)

Block	Cover
10 min — Introductions & context	Who is in the room and their role on each side. One-sentence confirmation of what was bought and what this call kicks off — not a pitch recap.
15 min — Brief alignment	Walk through the brief or retainer scope as documented. "Is there anything in how we've described this that doesn't match your expectation?" Confirm success metrics — a specific, observable answer.

10 min — How we work together	Communication channel and response times (you set these). How feedback and approvals work. How scope changes work. Invoice schedule and payment terms.
15 min — First-phase walkthrough	Exactly what happens in the first two to four weeks: what you'll deliver, in what format, by when. Dependencies you need from the client and the dates you need them.
10 min — Q&A and close	Open questions from either side. Confirm the first deliverable and date. Confirm who sends the follow-up summary (you do).

Phase 5 — Post-kickoff close

Within 24–48 hours of the kickoff.

- [ ] Send a kickoff summary email: what was discussed, the agreed first deliverable and date, any open items and who owns them, and the single next action the client needs to take.
- [ ] Update the client record with kickoff notes, agreed timeline, and anything new that came up.
- [ ] Confirm any outstanding access requests are still in progress.
- [ ] Set the first check-in reminder — default 10–14 days in, not at first deliverable. Earlier catches misalignment cheaply.

> **Quick reference.** Phase 1 (24h): scope in writing, deposit sent, terms communicated. Phase 2 (days 1–3): intake complete. Phase 3 (before kickoff): record created, folders set, team briefed, access requested, billing triggers set. Phase 4 (kickoff): brief aligned, process confirmed, first phase and dates locked. Phase 5 (48h after): summary sent, record updated, check-in set.

TEMPLATE 2 · INTAKE

New Client Questionnaire

The structured set of questions you send a new client — or work through on a discovery call — before quoting, scoping, or starting. Use the universal section for every client, then add the one project-type section that fits. Skip the rest.

Universal section — all new client engagements

Send these 19 questions to every new client, regardless of project type.

ABOUT THE BUSINESS

1. What does your company do, and who are your customers? (A sentence or two — in your words, not a press release.)
2. How long have you been in business, and what is your approximate annual revenue or team size? (Helps us right-size the work.)
3. What are your top three business goals in the next 12 months?
4. What is the biggest challenge your business is facing right now — and do you expect this project to address it directly?

THE PROJECT

5. What is prompting this project now? Has there been a specific event, change, or trigger?
6. How would you describe the outcome you're looking for — in terms a non-designer or non-marketer would use?
7. What does success look like at the end of this engagement? What's the specific, observable result?
8. What has already been tried? If you've worked on this problem before, what happened?

AUDIENCE AND MARKET

9. Who is your primary customer or target audience? Be specific — job title, company size, industry, geography.
10. Who are your two or three main competitors? What do you think they're doing better than you right now?
11. How does a typical new customer find you today — and where does that break down?

STAKEHOLDERS AND APPROVALS

12. Who will be involved in reviewing and approving our work? List everyone, with their role.
13. Who has final sign-off authority on this project?
14. Are there internal stakeholders (legal, brand, exec) who need to be consulted before approvals?
15. Have you worked with an agency before? If so, what worked well and what didn't?

BUDGET, TIMELINE, AND CONSTRAINTS

16. What is your budget range for this project? (A floor helps more than you'd think.)
17. Is there a hard deadline or launch date that's truly fixed — not preferred? What drives it?
18. Are there technical, legal, brand, or approval constraints we should know before we start?
19. Is there anything else that would help us do good work for you, that we haven't asked about?

Branding section

Add to the universal section for any brand identity, rebrand, or refresh (~31 questions total; 15–20 minutes for the client).

20. Do you have an existing brand identity? If yes, what do you keep, and what do you change?
21. How would you describe your current brand perception — how do customers see you today?
22. How do you want to be perceived after this project? What's the gap?
23. Are there brand elements that are non-negotiable (parent-company colours, a logo mark you can't change)?
24. Share 3–5 brands you admire — inside or outside your industry. What do you like about each?
25. Share 1–2 brands you dislike or want to look nothing like. What puts you off?
26. Describe your brand personality in 3–5 adjectives, then where you want it to land after the rebrand.
27. Who needs to review brand direction — and at what stage?
28. Where will this identity be used? List every surface: digital, print, signage, merchandise, presentations.
29. Do you need brand guidelines as part of the deliverable? What format?
30. Who internally will apply the guidelines after we hand over?
31. Are there partner or parent-brand guidelines this identity must stay consistent with?

Web design section

Add to the universal section for any website, landing page, or redesign (~32 questions total).

20. What is your current website URL? (If none, describe what exists today.)
21. What's wrong with the current site, in your words? What do visitors or your team complain about?
22. What do you most want to keep from the current site?
23. How does the current site perform against your goals? Any analytics you can share?
24. What is the primary goal of the new website? (Pick the primary one: leads, sales, explain the service, attract talent.)
25. What are the three pages or sections most important to your business?
26. Do you have a sitemap, page list, or wireframes already? If not, is that part of the scope?
27. Will you manage content yourself after launch? How comfortable is your team with the CMS?
28. Is existing content being migrated, or written from scratch?
29. Who provides or approves copy internally?
30. Do you have photography and assets ready, or is that part of what we're producing?
31. Any legal, compliance, or accessibility requirements for the content or site?
32. Hosting and domain preference, or should we recommend?
33. Any integrations required — CRM, booking, analytics, e-commerce, payment, live chat?
34. Must the site be built on a specific platform (Webflow, WordPress, Shopify)? Why?
35. Who handles technical maintenance after launch — your team, a third party, or us?

Marketing retainer section

Add to the universal section for any ongoing content, social, SEO, or digital retainer (~28 questions total).

20. What marketing is currently active — content, email, social, paid, SEO? What's working and what isn't?

21. What does your current content calendar or publishing schedule look like, if any?
22. Who is responsible for marketing today — and how much of their time does it take?
23. Where do you currently get the most qualified leads or traffic?
24. What is the primary marketing goal for the next six months? (Primary goal only.)
25. Which channels do you want to grow in, or stop relying on?
26. What's the one metric you'd most want to improve — the number that confirms the retainer is working?
27. What is your content voice today, and how does it need to shift?
28. Do you have brand guidelines, tone-of-voice docs, or an editorial style guide?
29. Who approves content before it publishes — and what's the typical turnaround?
30. What content assets do you already have that we can build on?
31. Any topics, products, or services that are off-limits or need sign-off before we write about them?
32. Any product or service roadmap launching in the next three to six months that marketing should support?

> **Sending the questionnaire.** Send it the day after a verbal agreement or scoping call — not as a condition of the first call. Use the universal section for everyone, plus the one project-type section that fits; sixty-plus questions is not a reasonable first touchpoint. Give the client five business days, then one follow-up.

The three project-type sections each restart their numbering at 20 because only one is appended to the universal 1–19 at a time.

TEMPLATE 3 · SALES

Website Discovery Call Checklist

A structured list of questions and topics for a scoping call with a prospective website client. Work through Sections 1–7 on the call; complete Section 8 within 24 hours. Items marked ★ should be done before the call.

Before the call — preparation

- [ ] ★ Research the client's current website — note what's missing, broken, or outdated.
- [ ] ★ Research one or two competitors they mentioned in earlier contact.
- [ ] ★ Review any brief or intake form the client submitted before the call.
- [ ] ★ Know your current availability and earliest project start date.
- [ ] ★ Have your discovery deposit amount ready to quote (if you charge for discovery).
- [ ] ★ Prepare screen share if you'll walk through references or their current site.

Section 1 — Goals and success definition

- [ ] What is the primary goal of the new site? (Leads / sales / credibility / replace an outdated site / launch something new.)
- [ ] How will they measure success? (Enquiries, sales, form completions, traffic — get a number if possible.)
- [ ] Who is the target audience, and what do they do when they land on the site?
- [ ] Any secondary goals or "nice to haves" that should not drive the primary design?
- [ ] What is the single most important thing a visitor should do on the site?

Section 2 — Current site and context

- [ ] What's wrong with the current site (if there is one)?
- [ ] What has worked well — anything to keep or carry forward?
- [ ] Has the client tried to fix the current site before? What happened?
- [ ] Are there existing brand assets? (Logo, style guide, fonts, colours, photography.)
- [ ] Existing copywriting assets, or does copy need to be written or sourced?

Section 3 — Scope

- [ ] How many pages / sections are in scope? (List them if possible.)
- [ ] Is there a CMS / blog / news section?
- [ ] Special functionality: e-commerce, booking, forms, member login, integrations (CRM, email, payment, booking).
- [ ] Is there content the client must provide? (Copy, images, video.)
- [ ] Agreed deadline for content delivery — and what happens if it's late?
- [ ] Third parties involved? (Developer, copywriter, photographer, SEO consultant.)

Section 4 — Timeline and urgency

- [ ] Is there a hard deadline? (Event, product launch, end of lease.)
- [ ] Preferred launch date?
- [ ] Flexibility in the timeline if scope expands?
- [ ] Blackout periods where the client is unavailable for approvals?
- [ ] How quickly can the client typically turn around feedback?

Section 5 — Budget

- [ ] Has the client shared a budget range? If not: "Do you have a figure in mind, or a ceiling you're working to?"
- [ ] Is the budget the build only, or does it cover ongoing maintenance and hosting?
- [ ] All at once or milestone-based? (Deposit / mid-project / final.)
- [ ] Does the client understand scope changes after sign-off are billed separately?
- [ ] Budget indicator: ___________ · Approach: Fixed fee / Hourly / TBD

Section 6 — Technical and hosting

- [ ] Preferred platform / CMS, or open?
- [ ] Who manages the domain and hosting today?
- [ ] Is the domain renewing soon? (Risk: expiry mid-project.)
- [ ] Will hosting be studio-managed or transferred to the client on completion?
- [ ] Email accounts on the domain that a migration could disrupt?
- [ ] Existing email marketing platform to integrate?
- [ ] SEO or analytics accounts already in use?

Section 7 — Decision and next steps

- [ ] Who is the decision-maker? Anyone else in sign-off?
- [ ] What does the client need from you to decide? (Quote, proposal, samples, reference call.)
- [ ] Is the client talking to other studios?
- [ ] What would make them choose you? What would make them not proceed?
- [ ] Timeline for their decision?
- [ ] Next step agreed: Send quote / Schedule follow-up / Send questionnaire / Discovery deposit invoice / No fit.

Section 8 — Post-call follow-up (within 24 hours)

- [ ] Send a call summary email — confirm goals, scope discussed, and agreed next step.
- [ ] Send a follow-up questionnaire for any items that need more detail.
- [ ] Add the project to your client database with status "Discovery".
- [ ] If proceeding: issue the discovery deposit invoice before detailed scoping.

- [ ] If not a fit: send a brief, respectful decline with a referral if possible.

DISCOVERY CALL SUMMARY RECORD

Field	Value
Client / prospect name	
Call date · Conducted by	
Primary goal	
Estimated scope	
Budget indicator	
Preferred launch date · Hard deadline?	
Decision-maker confirmed	
Competitor sites mentioned	
Platform / CMS preference	
Agreed next step · Follow-up due	
Outcome	Proceeding / Follow-up required / Not a fit

TEMPLATE 4 · SCOPE CONTROL

Scope Change Request Form

Capture every piece of work a client asks for outside the original agreement — what it is, why it's happening, the hours it adds, the cost, and who approved it. It turns an informal "can you just add..." into a signed, dated record before any extra work begins.

> Use this form to document any work outside the original agreed scope. Complete all fields before work begins. **Unsigned changes are not billable.**

SECTION 1 — PROJECT IDENTIFICATION

Field	Input	Notes
Project name	Short text	Required
Client name	Short text	Required
Original project start date	Date	Required
Original scope / proposal reference	Short text	e.g. "Proposal v2 dated 2026-03-10"
Change request number	Short text	e.g. SCR-001
Date of request	Date	Required — defaults to today

SECTION 2 — WHAT IS CHANGING AND WHY

Field	Input	Notes
Description of requested change	Long text	Plain language — "Add a blog section with 5 pages and a CMS", not "expand deliverables".
Reason for the change	Long text	Who asked, what triggered it, why it's out of original scope.
Which original deliverable(s) does this affect?	Long text	List affected items from the original scope document.

SECTION 3 — IMPACT ASSESSMENT

Field	Input	Notes
Estimated additional hours	Number	Required
Additional fee ($)	Number	Required. Leave 0 only for a genuine no-charge exception.
Timeline impact	Choice	No change / +up to 1 week / +1–2 weeks / +more than 2 weeks / TBD.
Affects any dependencies?	Choice	No / Yes — another deliverable / Yes — a third party. Describe if yes.

SECTION 4 — APPROVAL

Field	Input	Notes

Submitted by (agency/studio)	Short text	Your name
Client approver name	Short text	Required
Client approver email	Email	Required
Client approval (typed consent)	Short text	"Type your full name to confirm approval."
Date approved	Date	Required
Payment terms for this change	Choice	With next invoice / immediately on approval / deducted from retainer / no charge.

SECTION 5 — INTERNAL RECORD (AGENCY USE ONLY)

Field	Input	Notes
Change category	Choice	Client addition / revision beyond agreed rounds / external dependency / agency error (no charge) / regulatory.
Assigned to	Short text	Team member responsible for the work
Time logged against this change (hrs)	Number	Filled after work is complete, not at approval
Notes / context	Long text	Internal only — not shared with client

TEMPLATE 5 · SCOPE CONTROL

Scope Creep Tracker

A running log of every change request against the original agreed scope — when it was requested, by whom, whether it was approved, the hours it adds, and the cumulative cost impact. The baseline / requested / approved format gives a defensible paper trail from first request to final invoice.

Component 1 — Scope baseline

Complete once at project start, before any changes arrive. It's the reference point every future row measures against.

PROJECT DETAILS

- Client name · Project or retainer name · Start date · Contracted end (or renewal) date
- Contracted monthly hours (retainers) or total project hours · Contracted fee
- Scope document version and date · Primary contact (client) · Primary contact (agency)

AGREED DELIVERABLES

Copy from your original scope. "10 social posts" is trackable; "social content" is not.

#	Deliverable	Format / spec	Revisions	Agreed deadline
1				
2				
3				

EXPLICIT EXCLUSIONS

Anything the client asked about during scoping that you said no to. Listing it now saves the conversation later.

#	Exclusion	Notes
1		
2		

Component 2 — Change request log

Add a row every time a client requests something outside the original scope. Every request, not just the ones you approve — the pattern matters. Status: Pending / Approved / Declined / Absorbed.

#	Date	Requested by	Description	Hrs	Cost	Status	Billed?
1							
2							
3							

RUNNING TOTALS

- Total change requests to date · Total estimated hours requested (all statuses)
- Total approved change hours · Total absorbed hours

- Total billed for approved changes ($) · Total absorbed cost — unbilled work ($)

Component 3 — Period summary

Complete at the end of each billing period or phase. This is the document you bring to a scope conversation or renewal.

Metric	This period	Running total
Change requests received		
Requests approved · declined · absorbed		
Hours added (approved) · hours absorbed (unpaid)		
Additional revenue billed for changes ($)		
Estimated cost of absorbed work ($)		

Reading the numbers. If absorbed hours exceed 10% of contracted hours in a period, name it — a pattern of absorbing is a pricing or process problem. A high decline rate with ongoing requests means the client's mental model of the scope doesn't match the agreement; that needs a scope conversation, not just a declined request.

"As of [date], we've received [N] change requests since project start. [N] approved, [N] absorbed as small adjustments. The cumulative cost of approved changes is approximately [$X], which [has / has not] been invoiced. Before [next phase], we'd like to confirm how to handle [open request] — as a scope addition at [$rate] or a trade-off against [existing deliverable]."

TEMPLATE 6 · RETAINERS

Retainer Burn Tracker

For each retainer client: how many hours are contracted each month, how many used, whether rollover applies, and whether overage is owed. One view per month, one row per client.

MONTHLY RETAINER BURN — COLUMN STRUCTURE

Column	Type	Description
Client · Retainer tier / package	Text	e.g. "Growth Retainer", "10-hour block", "Core SEO"
Period	Date	Month this row covers
Hours contracted	Number	Hours included for this period
Hours banked from previous month	Number	Unused rollover (0 if no rollover policy)
Total hours available	Formula	Hours contracted + hours banked
Hours used	Number	Actual hours logged this period
Hours remaining	Formula	Total available − hours used
Overage hours · overage rate ($/hr)	Formula / Number	MAX(used − available, 0), and your agreed rate beyond the retainer
Retainer fee ($) · total invoiced ($)	Number / Formula	Monthly fee, plus overage fee
Invoice status · notes	Dropdown / Text	Pending / Sent / Paid / Overdue

ROLLOVER POLICY REFERENCE (PER CLIENT)

Client	Rollover?	Max rollover	Expires after	Overage billable?	Overage rate
Client A	Yes	5 hrs	1 month	Yes	[rate]
Client B	No	—	—	Yes	[rate]
Client C	Yes	Contracted	Never	No	—

FORMULAS

```
Total hours available  = hours_contracted + hours_banked
Hours remaining        = MAX(total_available − hours_used, 0)
Overage hours          = MAX(hours_used − total_available, 0)
Overage fee            = overage_hours × overage_rate
Total invoiced         = retainer_fee + overage_fee
Average burn rate (%)  = (hours_used / hours_contracted) × 100
Guard: if hours_contracted = 0, display "—" not a divide-by-zero.
```

Client-facing burndown. Share a simple weekly view — hours this week, cumulative used, hours remaining — at mid-month, so the client knows how much retainer time is left before requesting more work.

TEMPLATE 7 · RETAINERS

Retainer Renewal Review

A structured agenda and data-gathering framework for the conversation before a retainer rolls over or is renegotiated — what was delivered vs agreed, whether hours worked matched hours billed, where scope drifted, and whether the terms still make sense for both sides.

Part A — Pre-meeting data pull

Complete before sitting down with the client. A renewal conversation without numbers is a negotiation you're not ready for.

A1 · DELIVERY PERFORMANCE

- Scope items agreed vs delivered (complete / partial / outstanding) · items on time vs late
- Quality issues raised by the client · quality issues raised internally

Did you deliver what was agreed, at a quality you'd want in a case study? If not, be specific about why before the call — clients respect candour over deflection.

A2 · HOURS AND BILLING

- Contracted hours/month · average used/month · total logged · total billed · unused (rollover/forfeited) · overage (unbilled/absorbed)

> **Reading the hours.** Used < 80% of contracted: the retainer may be over-scoped — right-size it rather than pretend. Used > 110%: you're subsidising the client; the renewal is the moment to reprice or narrow scope. Roughly equal: healthy — focus the renewal on value, not volume.

A3 · SCOPE CHANGES SINCE LAST RENEWAL

Change	Requested by	Approved?	Billed separately?

A4 · PROFITABILITY CHECK

- Total retainer revenue · total hours × cost rate · pass-through costs · estimated gross profit · estimated gross margin %

Decision threshold: if margin is below 30%, the renewal terms need to change.

A5 · CLIENT RELATIONSHIP HEALTH (YOUR HONEST READ, 1–5)

- Responsiveness · brief quality · respect for process and timelines · strategic alignment · payment reliability · likelihood to refer

If three or more dimensions score 2 or below, a renewal without explicit changes to how the engagement runs will reproduce the same friction.

Part B — Renewal meeting agenda

A run-of-show for the renewal call. Estimated total: 45–60 minutes.

Block	Cover
5 min — Set the tone	Confirm the purpose (a structured review and a continue-or-not discussion) and who has decision authority. A two-way conversation, not a pitch.

10 min — What was delivered	"Any deliverables that didn't land the way you expected?" "Where should we have pushed harder?" "The piece you're most likely to reference?"
10 min — Hours and scope	"We logged X against a contracted Y — does that match your team's experience?" "Should the N additions become standing scope or stay separate?" "Anything in scope we can stop doing?"
10 min — Value and outcomes	"What business outcome was this meant to support — did we move it?" "How does your team use what we produce?" "A result you'd share publicly as a case study?"
15 min — Next-period terms	Renewal period, monthly fee and reasoning, written scope, overage policy, rollover policy, notice period (30 days standard; 60 for larger retainers), deliverable definition.
5 min — What changes & close	"The one thing you'd most like to be different next period?" Confirm who sends what, the term dates, and a 4-week first check-in.

> **After the meeting.** Send a summary within 24 hours, update the record with new terms, generate the first new-period invoice on the agreed date, and set a reminder for the next renewal review — default 8 weeks before the term ends.

TEMPLATE 8 · DELIVERY

Monthly Deliverables Tracker

A structured record of every piece of work your agency owes a client in a given month — one row per deliverable, with columns for owner, due date, status, client feedback, sign-off, and billing.

CORE COLUMNS — DELIVERABLE RECORD

Column	Type	Description
Deliverable	Text	Specific and actionable: "Homepage wireframe v1", not "design work"
Client · Project	Linked record	Required
Month · Due date	Date	Specific date, not just the month
Type	Dropdown	Strategy / Design / Copy / Development / Video / SEO / Reporting / Admin / Other
Owner · Priority	Text / Dropdown	Team member responsible · High / Normal / Low
Status	Dropdown	Not started / In progress / In review / Sent to client / Revision requested / Approved / Complete

DELIVERY DETAIL

Column	Type	Description
Description / brief	Long text	Scope reference, design brief, or content brief
Revision round · rounds agreed	Number	Current round vs the number in the project scope
Deliverable link / file · notes	URL / Long text	Working file, staging URL, or shared folder · blockers and dependencies

CLIENT SIGN-OFF

Column	Type	Description
Sent to client date	Date	When it was shared for review
Client feedback received? · date	Checkbox / Date	
Client sign-off received? · date	Checkbox / Date	Final approval confirmed
Sign-off method	Dropdown	Email / Typed form approval / Verbal (documented) / Not required

BILLING CONNECTION

Column	Type	Description
Billable?	Checkbox	Billable on its own vs bundled into a fixed fee

Hours logged · invoiced?	Number / Checkbox	Actual hours tracked · has this triggered a milestone invoice?

Useful views. This week (due in current week) · Awaiting client (status = sent) · Overdue (past due and not complete) · Needs sign-off (approved internally, sign-off not received) · per client · per team member.

TEMPLATE 9 · OPERATIONS

Client Project Database

A structured record of every active project at your agency — one row per project, with columns for client, status, budget, hours, invoicing, and next due dates.

CORE COLUMNS — PROJECT RECORD

Column	Type	Description
Project name	Text	Identifiable without the client name (e.g. "Brand refresh Q2")
Client	Linked record	Required
Project type	Dropdown	Website build / Brand identity / SEO retainer / Content retainer / Ad management / Development / Other
Status	Dropdown	Discovery / In Progress / Review / Awaiting Client / On Hold / Invoiced / Complete / Archived
Priority · Start date · Deadline	Dropdown / Date	High / Normal / Low; agreed delivery or milestone date
Brief / scope reference	Text	Link or filename of the agreed scope
Project lead · team members	Text	Responsible person and supporting team

FINANCIAL COLUMNS

Column	Type	Description
Fee type · quoted fee ($)	Dropdown / Number	Fixed / Hourly / Retainer / Value-based; agreed fee or monthly value
Estimated hours · hours logged	Number	Budgeted at quote vs tracked to date
Hours remaining · budget used (%)	Formula	Estimated − logged; (logged ÷ estimated) × 100
Invoiced to date ($) · outstanding ($)	Number / Formula	Total invoiced; quoted fee − invoiced
Invoice status	Dropdown	Not invoiced / Deposit / Partially / Fully / Paid / Overdue
Deposit amount ($) · paid?	Number / Checkbox	Upfront payment if applicable

DELIVERY & RELATIONSHIP COLUMNS

Column	Type	Description
Current milestone · next due date	Text / Date	What's being worked on now; next deliverable or check-in

Revision rounds used / agreed	Number	Track against the scope
Change requests · client sign-off?	Number / Checkbox	Approved scope changes; final approval before handoff
Client contact name · email	Text / Email	Primary contact for this project
Discovery call date · onboarding done?	Date / Checkbox	Questionnaire received, access granted, kickoff held
Project notes · link / URL	Long text / URL	Internal notes; live site, staging, folder, or design file

Useful views. Active (in progress) · Blocked by client (awaiting client) · Cash-flow alert (invoice overdue) · Near budget cap (used > 90%) · Urgency queue (deadline ascending) · per client.

TEMPLATE 10 · HANDOFF

Website Project Handoff Checklist

Every task that must be done before a web project transfers from your studio to the client — credentials, DNS, CMS training, post-launch scope boundaries, and the final invoice. Work through each section in order. All items checked before the final invoice goes out.

Section 1 — Pre-handoff delivery audit

- [ ] All agreed pages are live and accessible at the correct URLs.
- [ ] All pages reviewed at mobile (375px), tablet (768px), and desktop (1280px+) breakpoints.
- [ ] Cross-browser check completed (Chrome, Firefox, Safari minimum).
- [ ] All forms tested end-to-end (submission → confirmation → notification).
- [ ] 404 page configured and styled; all agreed redirects in place and tested.
- [ ] Page speed reviewed — no obvious uncompressed images or render-blocking scripts.
- [ ] Favicon, Open Graph, and social preview images in place.
- [ ] Analytics firing on all pages (confirmed in real-time view); Search Console verified.

Section 2 — Content and copy sign-off

- [ ] All copy matches the final approved draft (confirm version reference).
- [ ] All images have appropriate alt text; no placeholder ("Lorem ipsum") text remains.
- [ ] All links tested — no broken links.
- [ ] Legal pages in place: Privacy Policy, Terms of Service (or noted as outstanding).
- [ ] Cookie consent configured if required (GDPR / CCPA).
- [ ] Copyright year and business name correct in the footer.

Section 3 — Credentials and access transfer

Transfer all credentials before the final invoice.

- [ ] Domain registrar access: credentials or transfer confirmation provided.
- [ ] DNS access: nameserver or record management confirmed with the client.
- [ ] Hosting control panel: client has an account with sufficient permissions.
- [ ] SSL certificate valid, auto-renewing, in the client's name or hosting account.
- [ ] CMS admin account created with the client's email; studio dev accounts removed or downgraded.
- [ ] Email hosting: MX records confirmed, client has email admin access.
- [ ] Third-party integrations: API keys regenerated in the client's own accounts (payment, CRM, booking, other).
- [ ] Repository access granted if the client is technical; staging environment handed over or decommissioned (document which).

Section 4 — CMS training and documentation

- [ ] CMS training session completed or scheduled.
- [ ] Recording or written guide provided for the operations the client will perform (posts, pages, products, media library).
- [ ] "How to..." reference provided; client knows how to contact hosting support independently.
- [ ] Client knows what changes require a developer vs what they can do themselves.

Section 5 — Post-launch scope boundary

- [ ] Warranty / support period agreed and documented (duration and what it covers).
- [ ] Post-launch bug definition agreed: what's a bug vs a new feature request.
- [ ] Ongoing maintenance or hosting retainer discussed — what happens when the warranty expires.
- [ ] Scope change process explained; out-of-scope rates provided in writing.

Section 6 — Final invoice and project close

- [ ] All approved scope changes reviewed — overage included in the final invoice.
- [ ] Final invoice itemised against agreed deliverables; deposits and prior payments reconciled.
- [ ] Final invoice sent; client sign-off received (email, typed form, or signed document).
- [ ] Project status set to "Complete"; time entries reconciled — no unbilled hours remaining.
- [ ] Project files archived to the agreed location; internal debrief filed.

TEMPLATE 11 · OFFBOARDING

Client Offboarding Checklist

Everything you do from "project complete" to "account fully closed" — final invoice sent, files delivered, credentials handed over, access removed, feedback captured, and the relationship left clean for a future referral.

Phase 1 — Final billing and time reconciliation

- [ ] Pull all open time entries and mark them billed or written off — leave nothing "pending".
- [ ] Confirm no unbilled expenses remain (subcontractors, stock, travel, software).
- [ ] Check the original scope against what was delivered — note overages or under-delivery.
- [ ] Create and send the final invoice with a line description per service or phase.
- [ ] Reconcile any held deposit against the final total; issue a credit or top-up as needed.
- [ ] Confirm earlier invoices are settled before archiving; record the final invoice date.

Phase 2 — Asset and file delivery

- [ ] Compile all deliverables into one organised folder structure (by deliverable type, not internal phase).
- [ ] Include working files alongside exports — source files (.ai, .fig, .psd, .sketch, .xd) clearly labelled.
- [ ] Confirm you're delivering the formats specified in the brief; add a README or file index at the top level.
- [ ] Use the client's preferred delivery method; confirm delivery with what was sent, in what format, and where.
- [ ] Archive a copy on your own systems before removing any working files.

Phase 3 — Credentials and access handoff

The highest-error-rate phase in agency offboarding. Do it methodically — never delete your access until the client has full control.

- [ ] List every platform, account, and system you hold access to for this client.
- [ ] Website CMS · Transferred · N/A
- [ ] Hosting provider / registrar · Transferred · N/A
- [ ] Analytics / Search Console / Tag Manager · Transferred · N/A
- [ ] Social accounts (Meta Business Manager, LinkedIn Page admin) · Transferred · N/A
- [ ] Email marketing platform · Transferred · N/A
- [ ] Paid ad accounts (Google Ads, Meta Ads Manager) · Transferred · N/A
- [ ] Domain registrar · any third-party API keys you set up · Transferred · N/A
- [ ] Confirm the client has received and acknowledged each transfer; then remove your access and revoke agency-side keys.
- [ ] Note the transfer confirmation (date, method) in the client record in case of a later dispute.

Phase 4 — Knowledge transfer

- [ ] Prepare a brief usage guide for anything custom-built — even a one-page note on the three things they'll change most.

- [ ] Record a short walkthrough for complex interfaces if text won't be enough.
- [ ] State explicitly what is and isn't covered by any post-launch or maintenance period, in writing.
- [ ] Flag known issues, pending third-party dependencies, or items deliberately deferred from scope.
- [ ] Confirm the client knows who to contact for future work.

Phase 5 — Feedback and relationship close

- [ ] Send a short project-close survey within 5 days of delivery, while the work is fresh (3–5 questions max).
- [ ] Ask: delivered to the brief? · what worked well? · what would you change? · work with us again? · willing to be a reference?
- [ ] If sentiment is positive, ask directly for a review (Google, G2, LinkedIn) — don't assume they'll volunteer it.
- [ ] Log critical feedback in your internal retrospective; send a personal close message from the account lead.

Phase 6 — Internal account closure

- [ ] Mark the project complete with the actual end date; log final hours, revenue, and profit margin.
- [ ] Run a brief retrospective — one paragraph on what you'd do differently, while it's fresh.
- [ ] Tag the record "Past client" with relationship status (good standing / ended early / do not re-engage).
- [ ] Set a 3–6 month follow-up reminder; brief a case study now if the project warrants one.

Run these templates without the copy-paste.

Every template here describes work that lives in five separate tools for most agencies — a form, a database, a tracker, a timer, an invoice. Ascend is the workspace that runs all of it on one client record: the intake form fills the project, time logs against the task, and the invoice generates from those hours.

Start free at ascend.optivation.io

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