



— GUIDE FOR AGENCIES

How to put your client approvals in order

Five steps, a checklist and five templates to copy. Works with any tool, including email and chat. You don't need PortaliaFlow to apply it.

THE FIVE STEPS

- 01 **Agree the rules before the first piece**
- 02 **Ask for approval in a way that can be given**
- 03 **When they ask for changes**
- 04 **When they don't reply**
- 05 **Keep a record of every approval**

01

Agree the rules before the first piece

Most approval problems don't start in the piece: they start in what was never said. With each client, in writing and before you start:

- ☐ One person approves, by name. And a stand-in for when they're away.
- ☐ A response deadline counted from when they receive the piece, in working days, and what happens if it passes with no reply: it counts as approved, or publication is postponed. Pick one and write it down.
- ☐ How many rounds of changes each piece includes and what counts as a round: one list of changes sent in one go.
- ☐ One channel for approvals. Anything that arrives elsewhere gets copied to the official channel before anyone acts on it.
- ☐ What can change after approval (a typo, yes) and what can't (the concept or the message).

TEMPLATE · PARAGRAPH FOR THE PROPOSAL OR CONTRACT

Approvals. [Name] approves each piece on behalf of [client]; in their absence, [stand-in]. Each piece is sent with a response deadline of [n] working days. If there is no reply by then, publication is postponed until we receive it.

Each piece includes [n] rounds of changes. A round is one list of changes sent in one go through the agreed channel ([channel]). Changes of concept after approval are treated as a new piece.

02

Ask for approval in a way that can be given

“Looks OK?” in a voice note is not an approval request. A request carries everything the person needs to decide without asking:

- ☐ One piece per request. “Here are the twelve for this month” guarantees one gets no answer.
- ☐ What it is, which channel it's for and when it goes out.
- ☐ Which version it is and what changed from the previous one. Number your versions and never overwrite files.
- ☐ The response deadline, the one from the agreement.
- ☐ Two possible answers: “Approved” or “Changes” with the list. Ask for them in those words.

TEMPLATE · APPROVAL REQUEST MESSAGE

Subject: For approval · [piece] · [channel] · goes out on [date]

Hi [name]. Here is [piece] for [channel], scheduled for [publication date]. This is version [n]; compared with the previous one, [what] has changed.

We need your answer by [deadline]: “Approved” or “Changes” with the list. If we don't have it that day, publication is postponed.

[link or attachment]

03

When they ask for changes

Endless changes are rarely the client's fault: they come from changes that arrive loose, half-finished and unconfirmed.

- ☐ Ask for them in writing and together, in one list. Three messages and a voice note are not one round: they're three.
- ☐ Before touching anything, send the list back numbered as you understood it and ask for a "yes". It's one message and it saves around.
- ☐ Number the rounds on the piece itself (v2 · round 2 of 2) so everyone can see which one it's in.
- ☐ Separate corrections from changes of concept. A typo gets fixed; "let's try another angle" goes back to the brief and counts separately.
- ☐ When a piece reaches the last round included, say so before starting it, not after.

TEMPLATE · REPLY TO A CHANGE REQUEST

Thanks, [name]. Here's what I understood, in order:

1. [change] · 2. [change] · 3. [change]

If that's right, reply "yes" and you'll have it on [date]. This is round [n] of the [n] included in the piece.

04

When they don't reply

Chasing isn't about insisting harder: it's about having decided in advance when to remind, who to escalate to and what happens if there's still no answer.

- ☐ Three reminders, not ten: the next day, after three days and after a week. Always with the publication date in front.
- ☐ Each reminder says what happens without a reply: "if we don't have it by Thursday, it won't go out on Monday". No blame.
- ☐ When they run out, escalate: the account manager calls or writes to whoever hired you. Not a fourth message.
- ☐ Apply what was agreed in step 1. If it says publication is postponed, it's postponed, and you say so.
- ☐ Note who took how long. A client who is always late isn't a reminder problem: it's an agreement problem.

TEMPLATE · REMINDER

Hi [name]. [Piece] is still pending ([channel], goes out on [date]). We need your "Approved" or your "Changes" by [deadline]; otherwise publication moves to [new date]. It's here: [link].

Keep a record of every approval

What isn't written down wasn't approved. And what isn't measured can't be fixed.

- ☐ For each piece: who approved, when, which version and through which channel. One line in a table is enough.
- ☐ Keep the approval message as it is (copy or screenshot) next to the final version.
- ☐ If they asked for changes, keep the list and the round it arrived in.
- ☐ Once a month, look at three things: which clients take longest to reply, which pieces went past the rounds included and how many were postponed. That's where the fix is: the brief, the agreement or the person who approves.

TEMPLATE · RECORD TABLE (COLUMNS)

Client · Piece · Channel · Version · Sent on · Deadline · Answer (Approved / Changes) · Who · Date · Round · Published on

What you can do this week, without changing tools

- ☐ Write the approvals paragraph and send it to the three clients with the most back-and-forth.
- ☐ Use the request template on the next piece you send.
- ☐ Send the numbered list back before making the next changes.
- ☐ Open the record table and fill it in with this month's pieces.

YOU MAY ALSO FIND USEFUL

What to put in a brief so the piece comes out right first time The five questions every brief has to answer before production, with templates to copy.

How to tell a client is cooling off before they leave The four signals that a client is cooling off, how to measure them by hand every month and what to do about each one.

How to know what you owe each freelancer at month end Five steps so that paying freelancers doesn't depend on a spreadsheet: rate in writing, cost born with the piece, what counts as completed, expenses and month end.

How to show your client what you do for them every month Five steps so your client knows what you do for them without a twenty-page report: what to tell, let them see it, what's pending on their side, a fixed rhythm and the twenty-minute meeting.

And the twenty-five templates from the five guides, together: **[All the templates on one page \(portaliaflow.com/en/templates\)](https://portaliaflow.com/en/templates)**

portaliaflow.com/en/brief-guide · portaliaflow.com/en/client-health-guide ·

portaliaflow.com/en/freelancer-payments-guide · portaliaflow.com/en/client-updates-guide

If you'd rather it just happened

Everything above can be done with email and a spreadsheet. PortaliaFlow does it for you, in a portal with your brand:

- ✓ Each piece goes out with a deadline and the client answers on the piece itself: "Approved" or "Changes". Asking for changes requires a note.
- ✓ Three automatic reminders (next day, after three days and after a week, configurable) and escalation to the account manager and to you.
- ✓ Every delivery is a version and every round of corrections is numbered.
- ✓ Who approved, which version and when is recorded, with no separate table.
- ✓ Emails go out with your agency's sender, from your domain.

And so your client knows what to expect: **What your client will see, from the first email to the approved piece (portaliaflow.com/en/what-your-client-sees)**

And on that same page, to play the client with a sample piece and made-up data: **Try it: this is how your client approves (portaliaflow.com/en/what-your-client-sees#prueba)**

And what it doesn't do: it doesn't publish to social media, doesn't invoice and doesn't replace the agreement with your client.

A PortaliaFlow guide, client portal for agencies · portaliaflow.com/en/approvals-guide · Feel free to share it with your team and your clients.