



— GUIDE FOR AGENCIES

How to tell a client is cooling off before they leave

Four signals you can measure by hand, a monthly sheet per client and what to do about each signal. With a checklist and templates to copy. Works with any tool, including email and a spreadsheet. You don't need PortaliaFlow to apply it.

THE FOUR SIGNALS AND THE SHEET

- 01 They take longer to reply
- 02 They log in less
- 03 Their score drops, or you never asked
- 04 Delays pile up, yours too
- 05 The monthly sheet and what to do with it

01

They take longer to reply

A client who's leaving almost never says so. First they stop replying on time. The trouble is that one late reply goes unnoticed, and three in a row are already a lost month. Measure it:

- ☐ For each piece, note when you sent it for approval and when they replied. Two dates; that's enough.
- ☐ Compare with the deadline you agreed. If there's no agreed deadline, that's the first signal: start there.
- ☐ Look at the trend, not the single figure: one delay is a delay; three in a row, or a little more every month, is a signal.
- ☐ Separate “slow” from “doesn't decide”: if they reply quickly but always “I'll check”, who's in charge on their side has changed and nobody told you.
- ☐ Before chasing, ask. “Is this pace a problem for you?” opens more doors than the third reminder.

TEMPLATE · REPLY LOG (COLUMNS)

Client · Piece · Sent on · Agreed deadline · Replied on · Days over · Who replied · Reply (approved / changes / "I'll check")

At the end of the month: average days per client, compared with the previous month. Up two months in a row: a signal.

02

They log in less

When a client is happy, they look. They open what you send, go into the shared folder, comment, ask about the next piece. When they cool off, the first thing to go is the interest, long before the contract.

- ☐ Count how often the client goes into what you share (the folder, the calendar, the board) and how often they comment. No precision needed: "every week", "once in a while", "never".
- ☐ Look at who logs in. If two people used to and now it's one, or the one who does is new, ask what's changed in their team.
- ☐ Note the pieces they approved without leaving a single comment. Approving everything without looking isn't trust: it's indifference.
- ☐ Watch the meetings: do they shorten them, move them, send someone else? Every cancellation counts.
- ☐ Compare with how it was at the start. Any client's first few months are the yardstick; whatever has dropped since then is the signal.

TEMPLATE · ACTIVITY SIGNALS (ONE LINE A MONTH)

[Client] · Logs in: [every week / once in a while / never] · Comments: [yes / little / no] · Who: [names] · Meetings: [keeps them / moves them / sends someone else] · Compared with last month: [same / less / more]

03

Their score drops, or you never asked

What a client says in a meeting and what they'd put as a score from 0 to 10 are not the same thing. The score is awkward to ask for, which is why almost nobody does. It's the cheapest signal of all.

- ☐ One single question: "From 0 to 10, would you recommend our agency to someone like you?". And a second one: "What would you change?".
- ☐ The same question to every client, at the same cadence (every few months, not every week), in writing and not in passing.
- ☐ Make sure the person who decides answers, not the one you get on best with.
- ☐ Don't argue with the score. Say thanks, write down the comment and come back within a week with what you're going to change.
- ☐ What matters isn't the figure, it's how it changes: a client who goes from high to middling is the clearest signal in this guide.

TEMPLATE · MESSAGE TO ASK FOR THE SCORE

Hi [name]. A quick question so we can do this better: from 0 to 10, would you recommend [agency] to someone like you? And, if you like, in one line: what would you change? It only takes a moment and I read every reply myself. Thanks.

04

Delays pile up, yours too

The client's delays (materials that don't arrive, approvals that drag on) and the agency's (pieces that go out late) have one thing in common: when they stop bothering anyone, that client is already halfway out the door.

- ☐ List, per client, the pieces that were late this month and whose delay it was: the client's materials, the client's approval or the agency's production.
- ☐ Count the dates that moved. A piece whose date changes twice is a piece nobody cares about any more.
- ☐ A client who stops complaining about your delays isn't happier: they've stopped counting on you.
- ☐ If the delays are yours, say so before they do, with a new date and in writing.
- ☐ If they're theirs, ask what's changed: budget, priorities or people. It's almost always one of the three.

TEMPLATE · DELAY REVIEW (END OF MONTH)

[Client] · Pieces past their deadline: [n] · Due to the client's materials: [n] · Due to the client's approval: [n] · Due to the agency: [n] · Dates moved: [n] · Has anyone complained? [yes / no]

The monthly sheet and what to do with it

Each signal on its own has an innocent explanation. All four together, month after month, don't. The sheet isn't there to have data: it's there to decide who you call this week.

- ☐ Once a month, per client, mark each signal green, amber or red. No formula: your judgement, in writing.
- ☐ Keep each month's sheet. A three-month trend says more than any single month.
- ☐ A client in amber: one concrete action with a date and an owner (a call, a proposal, an extra piece, a change of contact person).
- ☐ A client in red: a conversation with no sales agenda. Ask what's going on and listen; don't sell.
- ☐ Write down what you did and what happened next. What works with one client will serve you with the next.

TEMPLATE · MONTHLY CLIENT SHEET

[Client] · Month: [month] · Replies: [green / amber / red] · Activity: [green / amber / red] · Score: [n out of 10, or "not asked"] · Delays: [green / amber / red]

Trend (three months): [better / same / worse] · Action: [what] · Owner: [name] · By: [date]

What happened: [online, the following month].

What you can do this week, without changing tools

- ☐ Fill in the monthly sheet for your three biggest clients with what you know today, without looking anything up.
- ☐ Note the sent and replied dates for every piece you send for approval this week.
- ☐ Send the score message to one client you've never asked.
- ☐ Call the client who's been quiet the longest, with nothing to sell.

YOU MAY ALSO FIND USEFUL

How to put your client approvals in order What to agree, how to ask for an approval that can be given, and what to do with changes and with clients who don't reply.

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 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/approvals-guide · portaliaflow.com/en/brief-guide ·

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

If you'd rather the four signals measured themselves

Everything above can be kept in a spreadsheet. PortaliaFlow works it out every day from what already happens in the portal, under your brand:

- ✓ Each client has a health score from 0 to 100 built from the four signals in this guide: how they respond to approvals, their activity, their 0-to-10 score and the delays on their pieces.
- ✓ The trend is calculated from a daily snapshot of each client; if there's no history, nothing is made up.
- ✓ You don't need to send a message for the score: your client rates you from 0 to 10 and comments from their own portal, and you see every reply and the average per client on the feedback page.
- ✓ The dashboard shows every client's health and trend, filtered by the last 7, 30 or 90 days; the operations report gives the average approval time per client and what's overdue, and every figure opens its tasks.
- ✓ When a client doesn't reply, reminders go out on their own and the escalation alerts the account manager and you; and each client's birthday and their one-month, six-month and one-year anniversaries are celebrated automatically by email, from your agency's sender.

And to see what you have on the dashboard every morning: **[What you will see, from the dashboard to paying each freelancer \(portaliaflow.com/en/what-you-see\)](https://portaliaflow.com/en/what-you-see)**

And on that same page, to let time go by with a made-up client who doesn't reply and watch what goes out, to whom and when: **[Try it: this is what the portal does when your client doesn't reply \(portaliaflow.com/en/what-you-see#prueba\)](https://portaliaflow.com/en/what-you-see#prueba)**

And what it doesn't do: the four weights of the health score are fixed (they can't be changed per agency), it doesn't send automatic surveys (your client rates you whenever they like from their portal), it doesn't measure your client's social media or sales, and it doesn't replace the call.