



— GUIDE FOR AGENCIES

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. With a checklist and templates to copy. Works with any tool, including email and a shared folder. You don't need PortaliaFlow to apply it.

THE FIVE STEPS

- 01 **Decide what you tell them, and always tell it the same way**
- 02 **Let them see it, not take your word for it**
- 03 **What's pending on their side, in writing**
- 04 **A fixed rhythm: one line a week, one page a month**
- 05 **The twenty-minute monthly meeting**

01

Decide what you tell them, and always tell it the same way

"My client has no idea what we do for them" is almost never for lack of work: it's because the work reaches them in pieces, over three channels, and never in the same order. Before telling them anything, decide what you tell:

- ☐ Four fixed sections, in this order: what's been published, what's in progress, what's pending on their side and what's coming next month. Always all four, even if one is empty.
- ☐ One line per piece: what it is, which channel, what state it's in and when it goes out. No adjectives.
- ☐ Report states, not effort. "Three reels published, two in review" is understood; "we've been on top of it" isn't.
- ☐ What the client approved is reported as theirs: "you approved the carousel on the 4th". They remember it, and it shows them their part.
- ☐ If you have reach or results data, it goes in a separate section with its source. Don't mix it with the work done: they're two different questions.

TEMPLATE · SUMMARY OUTLINE (THE FOUR SECTIONS)

Published this month: [piece · channel · date] · In progress: [piece · state · goes out on] · Pending on your side: [what · since when · needed by] · Next month: [piece · channel · planned date].

02

Let them see it, not take your word for it

A summary you write is your version. What convinces a client is being able to look for themselves, whenever they like, and see the same thing you see: the month's calendar with every piece and its state.

- ☐ One calendar per client per month, somewhere that's always up to date, not in an attachment that's out of date the day you send it.
- ☐ Every piece with a publication date, a channel and its real state: draft, in review, approved, scheduled or published. The state is changed by whoever does the work, the same day.
- ☐ One folder per client with the final versions, named and dated. What was published has to be findable next March.
- ☐ The client sees only their own work. Share the whole agency's calendar and they'll stop looking at it.
- ☐ Before every meeting, open the calendar as they see it. If you can't understand it in a minute, neither can they.

TEMPLATE · MONTH'S CALENDAR (COLUMNS)

Date · Piece · Channel · State (draft / in review / approved / scheduled / published) · Approved by · Approval date · Final version (link)

03

What's pending on their side, in writing

Half the time a client says “I don't know what you do”, what's actually happening is that the piece has been waiting two weeks for their materials or their approval. If it isn't written down, the delay is yours.

- ☐ A list of what's pending from the client: materials, access, approvals and replies. With the date you've been waiting since and the date you need it by.
- ☐ It goes in every summary, in the same tone as everything else. No reproaches and no apologies.

- ☐ Every item says what happens if it doesn't arrive: "without the photo on Thursday, the post moves to the following Monday".
- ☐ When it arrives, cross it off and say so: "received on the 8th, thanks". What gets thanked gets repeated.
- ☐ If the list doesn't get shorter in two months, it isn't a reminders problem: talk to whoever hired you.

TEMPLATE · PENDING ITEMS MESSAGE

Hi [name]. To carry on with [piece] we're missing [what]. We asked for it on [date] and need it by [deadline]; if it doesn't arrive, [what happens]. As soon as we have it, [next step]. Thanks.

04

A fixed rhythm: one line a week, one page a month

What gets reported when there's time doesn't get reported. Pick a day and a format for each rhythm and don't change them, not even when there's nothing new.

- ☐ Every week, same day: five lines. Published, in progress, pending on their side, next week and a question if there is one.
- ☐ Every month, same day: one page with the four sections from step 1. If it fits on a page, they read it; if it's twenty pages, they file it.
- ☐ If there's nothing new, send it anyway: "nothing went out this week; two pieces go into review on Thursday". Silence reads as neglect.
- ☐ Always the same sender, the account manager. Not whoever's free that Friday.
- ☐ Keep every summary you send. When someone asks "and what did you do in April?", the answer is in a dated email.

TEMPLATE · WEEKLY SUMMARY (FIVE LINES)

Week of [date] · Published: [pieces] · In progress: [pieces and state] · Pending on your side: [what, by when] · Next week: [what goes out] · Any questions? [yes / no, and which]

05

The twenty-minute monthly meeting

If the client has already been able to see the work and has received the page, the meeting isn't for going over what's been done: it's for deciding what's next and for listening. Twenty

minutes, with an agenda, always the same one.

- ☐ Before: send the month's page two days before the meeting. In the meeting it isn't read; it's discussed.
- ☐ Four-point agenda: what's happened (five minutes), what's pending on their side (five), what's coming and what needs deciding (five) and one question: "what would you change?" (five).
- ☐ What's decided is written down there and then and sent the same day, with an owner and a date. Without minutes, the meeting didn't happen.
- ☐ If the client moves it twice in a row, don't push for a third date: ask in writing what's changed.
- ☐ Once a quarter, invite whoever hired you, even if they're not the one approving each piece. They're the one who decides whether you stay.

TEMPLATE · AGENDA AND MINUTES (THE SAME MESSAGE)

[Month] meeting · 1. What's happened: [one-line summary] · 2. Pending on your side: [list] · 3. What's coming and what we decided: [decisions, owner, date] · 4. What you'd change: [what they said, verbatim].

Sent on [date] to [names]. If anything's wrong, tell me and I'll correct it.

What you can do this week, without changing tools

- ☐ Write the four-section outline and send the first weekly summary to your biggest client.
- ☐ Set up that client's calendar for the month somewhere shared, with the real state of every piece.
- ☐ Send the list of what's pending on their side, with dates, to the clients who have something stalled.
- ☐ Put the weekly summary day and the twenty-minute monthly meeting in the diary.

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 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.

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

If you'd rather your client saw it without anyone sending it

Everything above can be done with email, a folder and a spreadsheet. PortaliaFlow shows it on its own, in a portal on your domain with your logo, from what your team already does:

- ✓ Your client logs into their portal and sees their home: the pieces waiting for their approval, the month's calendar with the state of each one, what's planned for the next 30 days and the files you share with them. Only their own work, never other clients or your team's internal notes.
- ✓ Every Monday they get a summary of their space by email, from your agency's sender; your team gets the agency's. Without anyone writing it.
- ✓ What they have pending approval, the portal reminds them about: three reminders with a deadline and, when they run out, the escalation alerts the account manager and you.
- ✓ Every approval is recorded with a name, a date and a version, and the revision history keeps their rounds separate from the internal ones. What they approved three months ago can be opened.
- ✓ Before the meeting you open their portal exactly as they see it; and the operations report gives you the content published, how long each client takes to approve and what's overdue, with every figure opening its pieces and export to CSV.

And to see their seat from start to finish: **[What your client will see, from the first email to the approved piece \(portaliaflow.com/en/what-your-client-sees\)](https://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 \(portaliaflow.com/en/what-your-client-sees#prueba\)](https://portaliaflow.com/en/what-your-client-sees#prueba)**

And what it doesn't do: it doesn't generate PDF or branded reports, it doesn't measure reach, leads or sales (it doesn't connect to Meta, Google Ads or Analytics), it doesn't publish to social networks (the "Published" state is set by your team) and it doesn't replace the twenty-minute meeting.

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