

— FOR AGENCY OWNERS AND SERVICE TEAMS

The agency operations scorecard.

40 checks that follow the work, from the first enquiry to the final invoice,
and the team that does it.

TIME

Three short sessions

FOR

Owners, delivery and sales leads

EDITION

October 2026

— HOW TO USE IT

Score the agency you run, not the one you describe.

Most agencies don't lose money on the work they are good at. They lose it in the gaps around it: a lead that waited for a reply, a change done before it was priced, an invoice nobody chased, a new hire who learned the job by asking around.

Go through the scorecard with whoever runs sales and whoever runs delivery. Tick an item only when it is true today, on every project, not when it is planned or true for your best client. Where you disagree, open a recent project and check what actually happened.

Day 1	Two people fill the scorecard separately: the owner and one sales or delivery lead.
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Day 2	Compare your answers. Where they differ, open a recent project and look at the facts.
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Day 3	Count your ticks, pick the three gaps that cost the most time or money, and give each one an owner and a date.
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01 **Winning work**

Before the first project comes the first reply. This is where most agencies are slowest and know it least.

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- ☐ **Every lead, from every channel, sits in one pipeline with a stage and a named owner.**
Website form, email, referrals, social messages, events. If a lead lives only in someone's inbox, it is not in the pipeline.
 - ☐ **We have a written first-reply target, and we measure the real time against it every month.**
Measure it; don't estimate it.
 - ☐ **A prospect can book a call with us without an email back-and-forth.**
A booking page that shows times you are actually free, in the prospect's own time zone.
 - ☐ **Every open lead has a next step and a date.**
"Waiting to hear back" is not a next step.
 - ☐ **We know where each won client came from, and we review it every quarter.**
Decide where to spend your time on the work you won, not only on the enquiries you received.
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02 **Proposals and signatures**

A good proposal is the first deliverable. It sets the scope everyone will refer to later.

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- ☐ **Proposals start from our own packages, not from a blank page.**
Scope, timeline and payment schedule come prefilled; the team adapts them.
 - ☐ **Every proposal says what is out of scope, how many revision rounds are included and what the client must provide.**
These three lines prevent most arguments later in the project.
 - ☐ **Proposals and agreements are signed online, with the date and signer recorded.**
Nobody prints, signs and scans.
 - ☐ **Our agreement and NDA templates were reviewed once and are only filled in, never retyped.**
Retyping a contract for each client is how clauses go missing.
 - ☐ **Every sent proposal has follow-ups planned, and they stop as soon as the client signs or says no.**
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03

Onboarding new clients

The first two weeks set the tone for the whole project. They should feel the same for every client.

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- ☐ **A signature starts the same onboarding sequence every time.**
Welcome message, form, kick-off date, first invoice.
 - ☐ **Clients answer one onboarding form for their service, not a long email thread.**
Brand assets, access, goals, contacts and deadlines, collected once.
 - ☐ **Access to client accounts is shared without passwords in email or chat.**
Invite the agency as a user, or share through a password manager.
 - ☐ **From day one, the client knows their contact person, the milestones and the dates.**
 - ☐ **The kick-off has a fixed agenda and ends with dates both sides have agreed.**
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04

Delivery

Projects rarely fail on the craft. They drift on approvals, scope and who saw what.

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- ☐ **Every project is split into milestones with dates, visible to the whole team.**
 - ☐ **Each milestone ends with a written client approval, with the number of revision rounds agreed in advance.**
When rounds are counted, feedback gets more decisive.
 - ☐ **Internal discussion and client-visible updates are kept apart.**
The team can question, draft and disagree without the client reading it.
 - ☐ **Any request outside the scope is written down, priced and dated, and approved before work starts.**
A change done first and priced later is usually a change done for free.
 - ☐ **Files and decisions live in one shared place, not in personal inboxes or chats.**
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05

Client communication

Clients worry most when they hear nothing. Regular, short updates replace most status calls.

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- ☐ Clients can see where their project stands without having to ask.
 - ☐ Each active client gets a short written update every week, even when the week was quiet.
A quiet week explained is reassuring. A quiet week unexplained is not.
 - ☐ Each client gets a monthly report: what was done, what comes next and what we measured together.
Report what you measured. Don't promise what you can't control.
 - ☐ Approvals and answers we are waiting for are visible to the client, with dates.
Delays caused by waiting on the client should be visible to both sides.
 - ☐ We ask for feedback after key milestones and at the end of every project.
A short question after an approval surfaces problems while they are still small.
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06

Support after launch

Launch is where many clients feel dropped. A clear support plan keeps the relationship going.

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- ☐ Clients have one clear way to ask for help, not a team member's personal phone.
 - ☐ Each support plan has a written first-reply deadline, counted in business hours.
 - ☐ The hours included each month are written down, and the time used is tracked against them.
Without tracking, included hours quietly become unlimited hours.
 - ☐ Every support request has an owner and a status the client can see.
 - ☐ Once a month we review repeated requests to spot the fixes and projects hiding in them.
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07

Billing and profit

Revenue is not profit. You need to see both, per project.

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- ☐ **Invoices follow the milestones or schedule agreed in the proposal.**
No invoice should surprise the client.
 - ☐ **Recurring invoices go out on time without anyone having to remember.**
 - ☐ **Unpaid invoices get polite reminders on a set schedule: before, on and after the due date.**
A set schedule removes the awkwardness of deciding when to chase.
 - ☐ **Time is logged against tasks and compared with the estimate.**
The gap between estimate and reality is what makes your next proposal more accurate.
 - ☐ **We know the profit of every project once it ends: fee minus time and costs.**
Your busiest clients are not always your most profitable ones.
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08

Team

An agency scales on what is written down, not on what the founder remembers.

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- ☐ **Roles are written down, and each person sees only what their role needs.**
Fees, prices and margins visible only to the people who need them.
 - ☐ **When someone leaves, all their access is removed the same day.**
 - ☐ **New team members get a written handbook for their role, with a checklist for their first weeks.**
So the answers do not depend on who happens to be free.
 - ☐ **Before taking on new work, we can see each person's workload for the coming weeks.**
 - ☐ **Team accounts use two-step sign-in, and nobody shares a login.**
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— YOUR SCORE

Count your ticks.

32–40

Well run. Your systems hold; find the section where you scored lowest and tighten it.

20–31

A working agency with leaks. Pick the three gaps that touch the most projects or the most money, and fix those first.

Under 20

Too much depends on memory and goodwill. Start with sections 2, 4 and 7: signed scope, priced changes, invoices that follow milestones.

This score is a starting point for your own team, not a benchmark against other agencies. The useful part is the list of gaps it gives you.

Your three priorities

GAP	OWNER	DATE
1		
2		
3		



SEE IT RUNNING

Want these checks **built into one system?**

Qafza OS is the system we run our own agency on: sales, proposals and signatures, projects with a client portal, support, time and billing, under your own brand and domain. Book a 30-minute demo: we show it with sample data and look at how your agency works today.

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- Pipeline, booking page and proposal follow-ups
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- Milestones, approvals with revision rounds, change requests priced before work
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- Weekly updates, monthly reports and support deadlines
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- Invoices from milestones, reminders, time and profit per project
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Book a demo

qafza.dev/en/os



Qafza designs and builds brands, websites and software, and offers agencies and service teams Qafza OS, the system it runs its own agency on, under their own brand.