Your client growth decision brief

Example Agency

EXAMPLE REPORT - ILLUSTRATIVE ANSWERS, NOT REAL AGENCY DATA

65.3 / 100 | Watch

Useful foundations with uneven consistency

Several practices are established. Focus on where ownership or follow-through would help.

Revenue Visibility

66.7 / 100 | Watch

Account Leadership

66.7 / 100 | Watch

Founder and Senior Dependency

66.7 / 100 | Watch

Commercial Cadence

66.7 / 100 | Watch

Client Health

50 / 100 | Exposed

Growth Confidence

75 / 100 | Watch

THE DECISION: WHERE TO START

Client Health is your lowest complete area at 50/100.

18 of 18 answers scored. These are self-reported practices, not an industry benchmark or a prediction of client loss.

What the answers suggest together

These are hypotheses to test against live account evidence. A pattern in these answers does not prove a cause.

Visible opportunities need a stronger route to action

Basis: Q1 = 4/5; Q10 = 3/5.

You report evidence of opportunity, alongside less consistent review or progression. The immediate test is follow-through on opportunities already visible.

The question to take into your next review

Select a client-supported opportunity. Can its owner show a current decision, dated action and the latest client response?

A relative strength to build on

Growth Confidence. These are your highest complete areas at 60/100 or above. Ask what is working there and whether the same ownership, preparation or evidence could support the first priority.

Make the findings workable

Your agency context shapes the implementation, not the diagnostic score.

You want to focus on creating better commercial visibility. Use that aim to choose the pilot accounts; it has not changed your diagnostic score or ranking.

For your 11-25 person team, choose a small group of priority accounts and agree one accountable lead for the pilot.

You reported 50% to less than 75% of revenue from existing clients. That makes the management of current accounts especially relevant to your stated revenue base; it does not quantify revenue at risk.

The first behaviour to examine

Establish what normal looks like for each account. Otherwise a change in engagement or confidence is harder to notice early.

Q13 is one of the joint-lowest answers in this area. This is a practical starting point, not proof of a root cause.

> **WHAT ONE STEP BETTER LOOKS LIKE**
>
> We regularly identify early changes across most priority accounts.

The decision this should improve

Which change needs investigation now, who will speak to the client, and when will the response be reviewed?

Your first 30 days

Use this as a bounded pilot. The suggested timings are a working sequence, not a forecast of commercial improvement.

Suggested accountable lead

Account owner, supported by client services and delivery

Days 1-7 | Establish the evidence

Choose a small set of priority accounts, for example three if that fits your business. Agree the owner and record the current position. For a recent concern, compare the first observable change with when somebody acted on it.

Days 8-21 | Put one change into practice

Choose a small set of relevant signals for priority accounts. Record the evidence, change from normal, accountable owner and next review or response.

> **THE TANGIBLE OUTPUT**
>
> A short health review for the pilot accounts, recording relevant signals, change from normal, evidence and an accountable response.

Days 22-30 | Review the change

Count pilot accounts with a dated, evidence-based health review. For concerns raised, count those with an owner, response and review date.

Compare the same accounts and the same definitions with the starting position. Note exceptions and what changed in the evidence. Do not interpret a higher self-assessment score as proof of increased revenue.

At day 30, decide

Continue, adapt or stop the pilot. Expand only if the routine is useful and somebody can maintain it. Agree the next review date and any support needed.

Owner: ____________________ Pilot accounts: ____________________

First review: _______________ Day-30 review: ____________________

Revenue Visibility

66.7 / 100 | Watch

The revenue outlook has useful structure, with some inconsistency in evidence or review.

The answers behind the finding

Q1 | How well evidenced are the growth opportunities you expect from priority clients in the next six months?

Most priority accounts have client-supported needs and next steps recorded.

Q2 | How is expected continuation or reduction in client spend reflected in the six-month revenue outlook?

Most priority accounts have assumptions tied to contract, budget or client evidence.

Q3 | What supports the existing-client revenue forecast used by leadership?

Supporting evidence for some material forecast items.

What to make of this

Leadership needs a forecast that can be challenged. Make the evidence and uncertainty visible alongside the number.

Q3 is the lowest answer in this area. This is a practical starting point, not proof of a root cause.

Your next practice

Evidence and clear assumptions for most material items, separating confirmed and potential work.

Check it on a real account

Take the largest unconfirmed forecast item. What has the client actually said or committed to?

Evidence of progress

Count material forecast items with dated client evidence, an owner and a next review. Record the total reviewed as the denominator.

Account Leadership

66.7 / 100 | Watch

Account leadership is established in places, but expectations or practice vary.

The answers behind the finding

Q4 | How consistently do client leads initiate useful conversations beyond the active delivery brief?

They do so regularly across most priority accounts.

Q5 | How consistently do client leads develop a client signal into a credible opportunity?

Most leads test needs, relevance and a possible next step.

Q6 | How clear is responsibility for developing existing-client opportunities?

Ownership is defined for some accounts or opportunities.

What to make of this

Ownership needs to become explicit. Name the lead, contributors and decision boundaries for a real opportunity.

Q6 is the lowest answer in this area. This is a practical starting point, not proof of a root cause.

Your next practice

Most priority opportunities have an accountable lead and agreed contributors.

Check it on a real account

Review the last conversation beyond delivery: what client need was tested and what happened afterwards?

Evidence of progress

Count pilot opportunities with an accountable lead and a recorded client-tested next step. Record how often senior prompting was needed.

Founder and Senior Dependency

66.7 / 100 | Watch

Delegation is working in places, with some activities still relying on senior intervention.

The answers behind the finding

Q7 | How often does progress require senior intervention because others lack the authority, confidence or capability to proceed?

Occasionally, with limited disruption when seniors are unavailable.

Q8 | How many of the seven listed activities cannot reliably progress without a particular founder or senior person?

Two or three activities.

Q9 | If founder or senior involvement fell by 30% for the next month, how prepared is the team to maintain progress?

Most key activities have capable owners and clear escalation routes.

What to make of this

The breadth of dependency deserves a practical test. Start with one recurring activity and establish who else could progress it safely.

Q8 is the lowest answer in this area. This is a practical starting point, not proof of a root cause.

Your next practice

Establish a capable deputy and a clear decision boundary for one recurring activity that currently depends on a senior person. Test that cover in practice before reviewing the overall dependency count.

Check it on a real account

Identify the last activity that stalled while a senior person was unavailable. What specific decision could nobody else make?

Evidence of progress

Count occasions when the chosen activity progresses within delegated authority. Record exceptions and the reason for each escalation.

Commercial Cadence

66.7 / 100 | Watch

A review rhythm exists, with some unevenness in ownership or follow-through.

The answers behind the finding

Q10 | How are existing-client opportunities reviewed with actions and ownership?

Some priority accounts are reviewed, but the approach varies.

Q11 | What usually happens after a potential opportunity is identified?

It is usually owned and tracked to a decision or next action.

Q12 | How do account priorities influence weekly or monthly activity?

They shape regular activity across most priority accounts.

What to make of this

The review routine is the immediate lever. It needs to connect evidence and decisions with owners and dates.

Q10 is the lowest answer in this area. This is a practical starting point, not proof of a root cause.

Your next practice

Reviews are regular, with owners and next steps, but follow-through varies.

Check it on a real account

Take a recent opportunity from discussion to its latest decision. Can the trail be followed without asking several people?

Evidence of progress

Count reviewed opportunities with a current decision, named owner and next date. Track overdue actions and why they remained open.

Client Health

50 / 100 | Exposed

Early signals, review quality or response ownership appear inconsistent.

The answers behind the finding

Q13 | How consistently do you recognise changes in engagement, confidence or relationship strength before a client escalates an issue?

We identify some early changes, but the approach varies.

Q14 | How consistently are meaningful client-health signals reviewed across priority accounts?

Relevant signals are reviewed for some priority accounts.

Q15 | When a client-health concern is identified, what happens next?

An owner and response are agreed in some cases.

What to make of this

Establish what normal looks like for each account. Otherwise a change in engagement or confidence is harder to notice early.

Q13 is one of the joint-lowest answers in this area. This is a practical starting point, not proof of a root cause.

Your next practice

We regularly identify early changes across most priority accounts.

Check it on a real account

For a recent concern, compare the first observable change with when somebody acted on it.

Evidence of progress

Count pilot accounts with a dated, evidence-based health review. For concerns raised, count those with an owner, response and review date.

Growth Confidence

75 / 100 | Watch

Useful value conversations happen, but their coverage or follow-through varies.

The answers behind the finding

Q16 | How consistently are account conversations connected to the client's business priorities?

They regularly inform conversations across most priority clients.

Q17 | What evidence shows that clients understand the relevant wider value your agency could provide?

Most priority clients have discussed relevant outcomes and where we could contribute.

Q18 | How consistently is a relevant next-step opportunity tested with the client?

We regularly test relevance, value and appetite before proposing more work.

What to make of this

Your lowest answer already describes an established practice in most cases. The refinement is consistent application and review, rather than starting the activity from scratch.

Q16 is one of the joint-lowest answers in this area. This is a practical starting point, not proof of a root cause.

Your next practice

Current client priorities consistently shape account decisions and proposed next steps.

Check it on a real account

Ask the client to describe their current business priority in their own words. Compare it with the account plan.

Evidence of progress

Count value hypotheses tested with the client. Record whether each was progressed, revised or stopped and the evidence behind that decision.

Choose the support that fits

Client Growth Planner

You have someone who can own the improvements and prefer to manage them yourselves. The planner can give the team a shared working routine.

What to use it for

Use the planner to maintain the evidence, ownership and review routine from your pilot - starting with client health review. The useful outcome is a shared working record that informs decisions.

What it cannot resolve by itself

A tool cannot assign real decision authority, create implementation time or establish client appetite. Agree those responsibilities before expecting the routine to stick.

> NEXT STEP
>
> Request planner access from your results page. This records your interest and does not create a paid commitment.

A useful agenda for your own team

1. What evidence supports our first priority, and what challenges it?
2. Which account example should we test first?
3. Who can act, with what authority and time?
4. What will we record to judge whether the change is useful?
5. When will we review the evidence and choose the next step?

How this report was produced

Scoring

Each of six equally weighted areas has three questions scored 1 to 5. Area score = (points - 3) / 12 x 100. Overall score = (points - 18) / 72 x 100. Bands use unrounded values; displayed scores use one decimal place.

Critical: below 20. High Risk: 20 to below 40. Exposed: 40 to below 60. Watch: 60 to below 80. Strong: 80 to 100.

Missing information and priority gaps

Unknown answers receive no numeric score. An area needs three numeric answers; the overall score needs all 18. Every complete area below 40 receives a priority notice. All tied lowest areas are retained; the first displayed priority follows the fixed tie order described earlier.

Interpretation and evidence

Interpretations are generated from explicit answer combinations and the context you provided. The report identifies the answer or area behind each suggested priority. The framework has not been validated against client outcomes. Answers have not been independently verified.

Financial reference period

1 Sept 2025 to 31 Aug 2026. References to practice generally concern the 90 days before the assessment; question-specific future periods are stated in the questions.

Your original result

The submitted answers, score and recommendation remain the original assessment snapshot. This download uses report edition 1.1 to explain those answers in more detail. New report wording does not rescore the assessment.

Your information

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