AFactor

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CROSS-ROLE INSTRUMENT · CLIENT REALITY SPINE

Client Handover Pack

A reality audit for the first two weeks of any engagement. Structured so that the gaps are as visible as the answers, because the gaps are what will hurt you in month three.

THE DECISION THIS TEMPLATE PROTECTS

Whether you have enough reality about this client to commit to anything at all.

ROLE	COURSE PLACEMENT	REVISION
Every role, every level	**Main Course Module 1 · Business, Market & Competitive Discovery**	**Version 1.0** **Current as of 19 August 2026**

Work the seven sections **in the order given**. The order is the teaching. Commercial reality comes first because every later decision is bounded by it, and decision rights come second because the most common cause of dead work is a veto nobody named. Fill this with the client in the room, not afterwards from memory. Where you cannot fill a box, write **NOT KNOWN** and date it. A handover pack with eleven blanks is a more useful document than one with eleven guesses.

BEFORE YOU START, YOU NEED

- At least one scheduled conversation with someone who owns the commercial outcome, not only the marketing contact.
- Read-only access, or a promise of it, to whatever analytics and ad accounts exist.
- Any prior agency deck, audit or strategy document. Ask for the ones that did not work as well.
- Two uninterrupted hours. This is not a form to complete between meetings.

01 Commercial reality

Everything downstream is bounded by what this business actually sells and what it can absorb. Start here or you will design a campaign the business cannot fulfil.

WHAT IS ACTUALLY SOLD

The product or service as a buyer experiences it. Not the category. Not the website headline.

HOW THE MONEY WORKS

Revenue model, rough gross margin, what a customer is worth over a reasonable horizon, and how confident the client is in that number.

FULFILMENT CEILING

How many new customers or enquiries per month this business can serve before quality drops. Ask the operations person, not the marketing person.

WHAT ACQUISITION CURRENTLY COSTS

Blended, per channel, or unknown. Unknown is an acceptable and common answer. Record it as unknown rather than estimating.

> If the client cannot answer what a customer is worth, that is finding number one and it changes the shape of the engagement. You are now also building the case for measurement, and that should be priced and scheduled.

02 Decision rights and stakeholders

Work dies when an unnamed person objects late. Map the room before you build anything.

NAME AND ROLE	WHAT THEY DECIDE	CAN THEY VETO?	HAVE YOU MET THEM?

WHO SIGNS OFF CREATIVE, AND HOW LONG DOES THAT TAKE

WHO IS NOT IN THE ROOM BUT WILL HAVE AN OPINION LATER

A founder's spouse, a regional head, a board member, the sales director who was not invited to kickoff.

WHAT IS THE SLOWEST APPROVAL YOU SHOULD PLAN AROUND

03 History and prior attempts

This is usually the client's least organised knowledge and your highest value input. Somebody has already tried the thing you are about to propose. Find out what happened.

WHAT WAS TRIED	WHEN	WHAT WAS CONCLUDED	WHY IT STOPPED

THE STORY THE CLIENT TELLS ABOUT WHY PREVIOUS WORK FAILED

Record it in their words. You are not required to believe it, but you are required to know it.

WHAT YOU SUSPECT ACTUALLY HAPPENED

Your read, separated from theirs. Keep the two apart on the page.

04 Access and asset inventory

Track what you were promised against what you received, with dates. This single habit resolves most disputes about why month one was slow.

ASSET OR ACCESS	OWNER	PROMISED ON	RECEIVED ON	STATUS
Ad accounts				
Analytics				
Search console				
CRM				
Website admin				
Creative library				
Brand guidelines				
Customer data				

WHO LEGALLY OWNS EACH ACCOUNT

If a previous agency owns the ad account, that is a business risk, not an administrative detail.

05 Constraints and non-negotiables

Constraints are not obstacles to work around. They are the shape of the problem, and a plan that ignores them is a plan for a different client.

CONSTRAINT TYPE	THE REALITY	HOW FIRM IS IT?
Budget		
Geography		
Timeline		
Regulatory or compliance		

CONSTRAINT TYPE	THE REALITY	HOW FIRM IS IT?
Operational capacity		
Things the founder will never allow		
Things the last agency did that must not repeat		

> Ask directly: **what would you refuse to do even if it worked?** The answer is often the most useful sentence in the whole handover, and clients are rarely asked for it.

06 Success definition, and the measurement it rests on

Two questions, and the second one matters more. What does working look like, and can you currently prove it?

WHAT THE CLIENT SAYS SUCCESS LOOKS LIKE

Their words, verbatim.

WHAT THAT TRANSLATES INTO AS A NUMBER, OVER WHAT PERIOD

CAN THAT NUMBER BE MEASURED TODAY?

Check the tracking yourself. Do not take yes for an answer.

METRIC THAT MATTERS	WHERE IT COMES FROM	DO WE TRUST IT?	GAP TO CLOSE

> If the measurement does not exist, building it is the first deliverable and it should be visible in the plan and the price. Agreeing to be judged on a number nobody can produce is the most common unforced error in this business.

07 Risk register and exit triggers

Write this on day one, when you can still see the engagement clearly. In four months you will have adjusted to things that should have worried you.

RISK OBSERVED	LIKELIHOOD	WHAT IT WOULD COST US	EARLY WARNING SIGN

CONDITIONS UNDER WHICH THIS ENGAGEMENT SHOULD BE RENEGOTIATED

CONDITIONS UNDER WHICH IT SHOULD END

Writing this down does not make it likely. It makes it survivable.

08 The Engagement Reality Sheet

Compress everything above onto one page and have the client sign it. The signature is the point. It converts a vague expectation into a shared record, and it is the cheapest insurance available in client work.

LINE	AGREED POSITION
What we are trying to achieve	
How we will know it worked	
What we can measure today	
What we cannot measure yet	
Budget and period	

LINE	AGREED POSITION
Volume ceiling the business can serve	
Who approves what	
What is explicitly out of scope	
Biggest known risk	
Review date	

	NAME	SIGNATURE	DATE
Client			
Us			

JUDGMENT PROMPTS

1. Which of the seven sections is thinnest, and what does that thinness tell you about how this client operates?
2. What did they state with confidence that you have seen no evidence for?
3. What are you being asked to be accountable for that you do not control?
4. If this engagement fails in six months, which line on this page will turn out to have been the cause?

WHAT THIS TEMPLATE WILL NOT DO FOR YOU

- It will not tell you whether to take the client. It will tell you what you would be taking on.
- It will not survive being filled in alone at your desk. The value is in the conversation it forces.
- It does not replace a contract. A signed reality sheet is a shared understanding, not a legal instrument.
- It cannot fix a client who will not answer. If three sections stay empty after two attempts, that is your finding.

THE DEFENSIBLE OUTPUT

A one-page Engagement Reality Sheet, signed by both sides, plus the completed pack behind it as the working record.

This is portfolio-eligible. A handover pack with honest blanks, a named risk that later materialised, and a signed success definition demonstrates more professional judgment than a campaign screenshot.

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