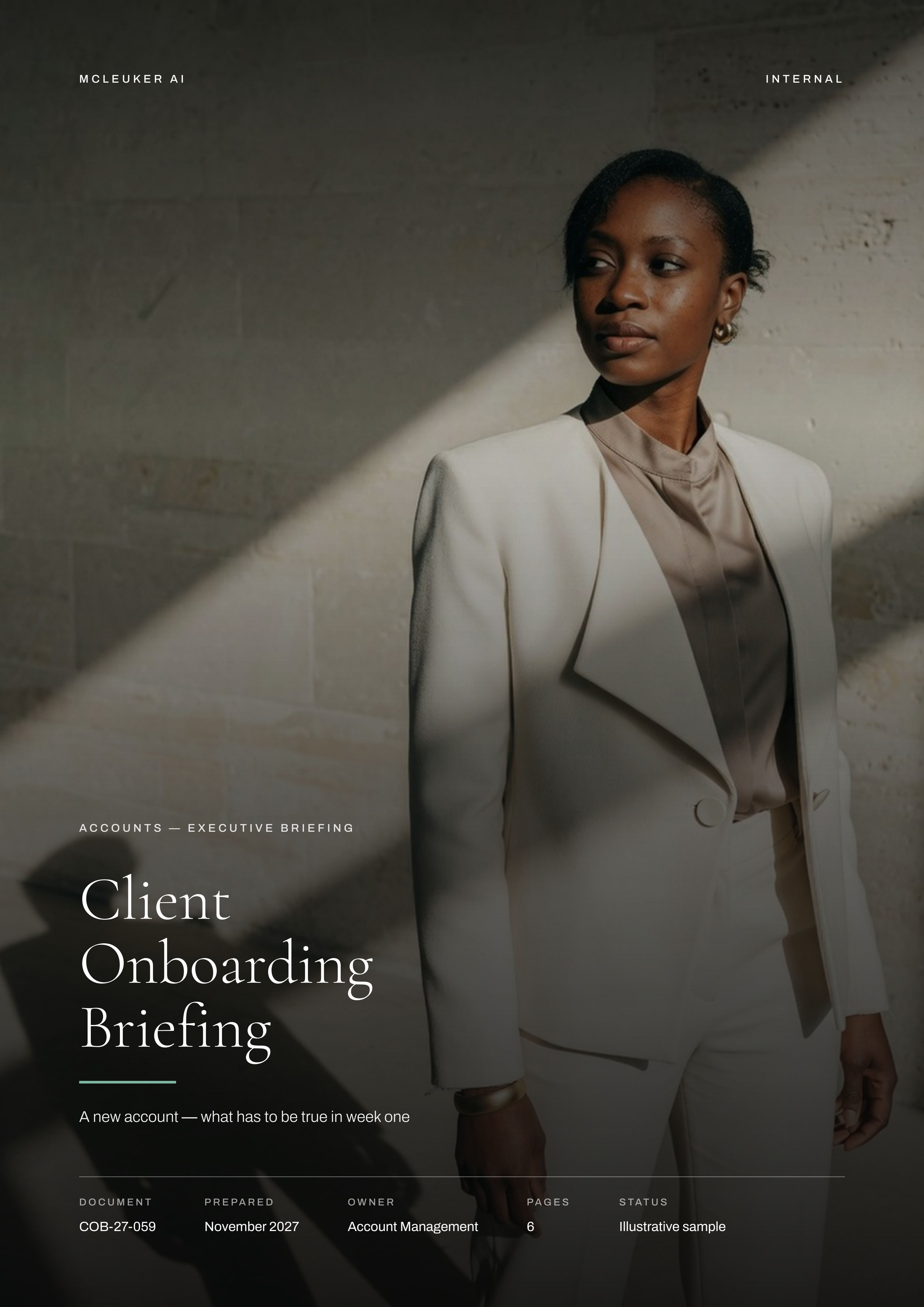


ACCOUNTS — EXECUTIVE BRIEFING

Client Onboarding Briefing

A new account — what has to be true in week one

DOCUMENT	PREPARED	OWNER	PAGES	STATUS
COB-27-059	November 2027	Account Management	6	Illustrative sample

The read

Approvals, not scope, are the risk. The scope is written and agreed; who signs off and in what order is not, and every account that has gone over on hours in the last two years went over on revision rounds rather than on the work itself.

0	3	5.8	2 yrs
Named approvers on the account	Revision rounds in scope	Average rounds on accounts that overran	Period reviewed

AGREED

01 Scope of work.

02 Fee and payment terms.

03 Delivery dates.

NOT AGREED

01 Who approves, and in what order.

02 What counts as a round.

03 What happens after round three.

What the client asked for.

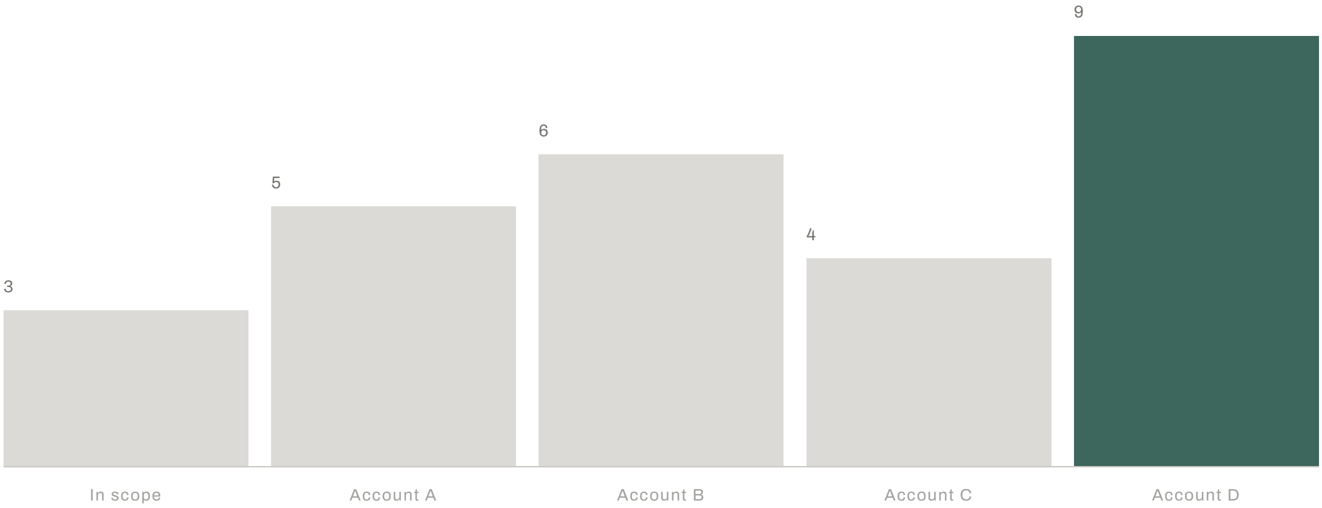
THE BRIEF · MCLEUKER HOUSE SET

SO WHAT Every overrun in two years came from revision rounds, not from scope. Naming approvers in week one is the cheapest protection available and it is currently skipped on every account.

Where accounts overrun

ROUNDS TO SIGN-OFF, LAST TWO YEARS

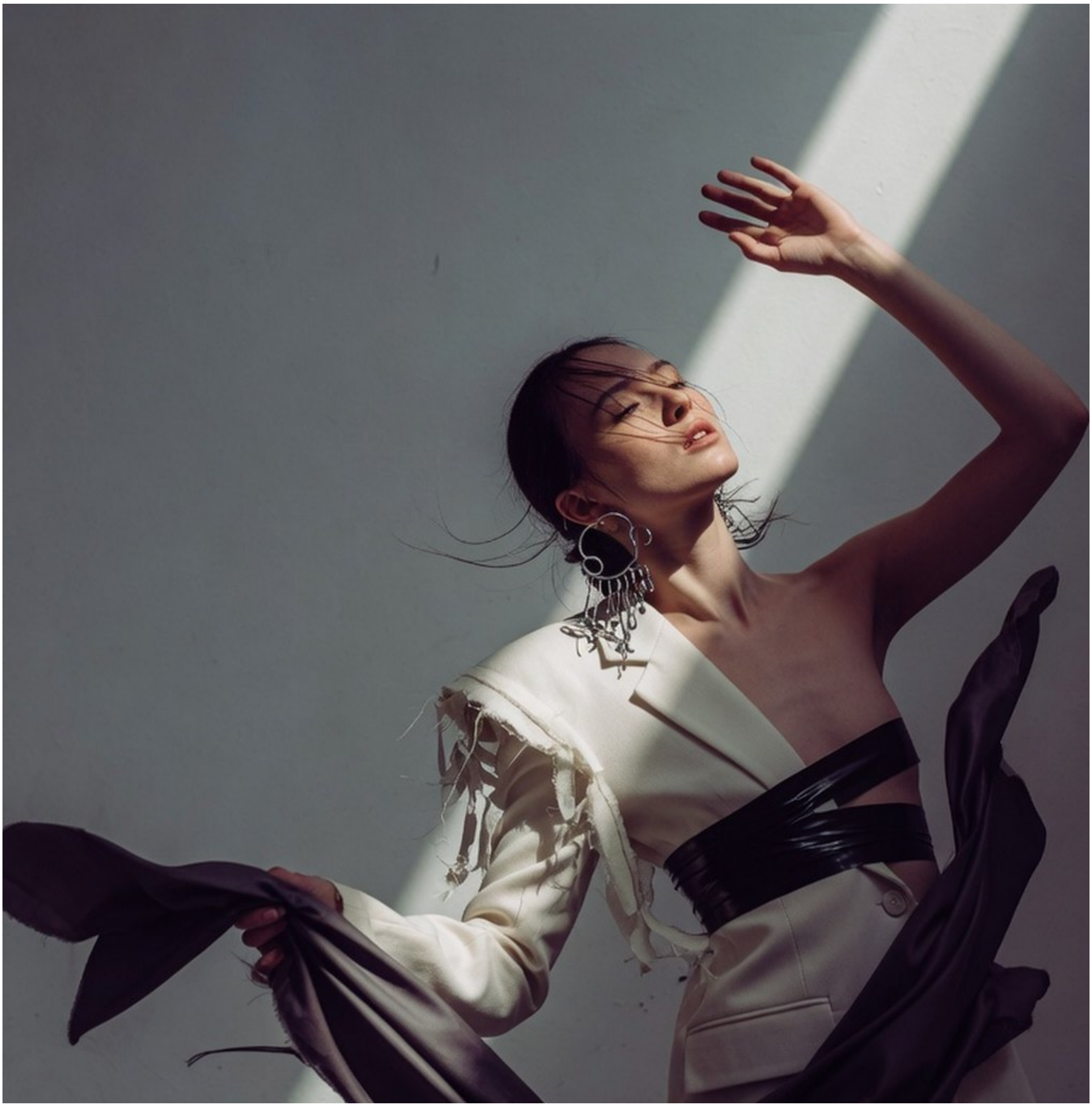
Revision rounds to final approval.



CAUSE

ACCOUNT	ROUNDS	NAMED APPROVER	CAUSE OF EXTRA ROUNDS
Account A	5	NO	A second stakeholder appeared at round three
Account B	6	NO	Approver changed mid-project
Account C	4	YES	One genuine change of direction
Account D	9	NO	No single approver at any point

SO WHAT The one account with a named approver ran closest to scope. That is a small sample and it points the same way as every conversation about why the others did not.



The pitch is the product until the account is won, and nobody bills for it.

MCLEUKER HOUSE SET

Week one

WHAT HAS TO BE WRITTEN

Approver	One name, with a deputy
Order	Who sees it before the approver, and who does not
A round	Defined — consolidated feedback, once, in writing
After round three	Chargeable, at a stated rate
Not assumed	That the approver has authority — confirmed, not inferred

SEQUENCE

DAY 1	Name the approver and the deputy Before any work starts, not at the first review.
DAY 2	Define what a round is, in writing Consolidated feedback once. Not three emails.
DAY 3	Agree the after-three position While it is hypothetical and cheap to agree.

SO WHAT All three of these are easy to agree in week one and very hard to introduce at round four, which is exactly when they are currently raised.

Decisions

DECISIONS ARISING FROM THIS BRIEFING

DECISION	OWNER	BY	IF IT IS NOT TAKEN
Name an approver and deputy before work starts	Account Director	Day 1	The account overruns on rounds like the last four
Define a revision round in writing	Account Director	Day 2	Three emails count as three rounds or as one
Agree the position after round three	Managing Director	Day 3	It is negotiated when the relationship is strained
Track rounds against scope on every account	Studio Director	30 Nov	The pattern stays invisible for another two years

SOURCES AND BASIS

Revision rounds — our own project records, trailing two years.
Scope — the signed statement of work per account.
Overrun causes — project debriefs as recorded at the time.

ILLUSTRATIVE SAMPLE

This document is a rendered SAMPLE of the Client Onboarding Briefing template, produced to show its structure, exhibit inventory and register. The figures in it are illustrative and are not market intelligence. A real run of this template researches and cites its figures with an as-of year for each, or marks them as modelled and states the basis — the rule the template itself carries.