AgencyGod

THE FREE KIT

CLIENT RETENTION · PROVING ROI

The Client Reporting Kit

The report that keeps a client paying you **$3,000 a month** is not the one with the prettiest charts. It is the one that says "here is the money we made you and the money we saved you" in the first 30 seconds. Inside: the fill-in one-page Money Report, the 90-second summary script, the ROI calculator, the QBR deck, and the cadence that doubles renewals.

- The one-page Money Report
- The 90-second summary script
- Outcomes-vs-activity swap
- The ROI calculator
- The 7-slide QBR deck
- 5 subject lines + reopen email

A kit from **AgencyGod**
agencygod.com

$10K GTD

The $10,000 Guarantee
You get the result or you get paid $10,000

YOUR REPORT IS WHY THEY CHURN

"So what am I actually paying $4,000 a month for?"

Your client asked you that last week and you froze. The campaign is working. You just have no clean way to prove it in a sentence.

So you send a 14-page dashboard full of impressions and clicks, and you are pretty sure they never open it. You are proving you are busy. You are not proving you made them money. That gap is exactly where clients quietly check out, forget you exist, and cancel a relationship that was actually performing fine.

THE QUIET KILLER

Clients rarely leave because the work failed. They leave because they could not **see** the work. Dissatisfaction with delivery is now the **#1 reason clients end agency relationships at 48%**, up 14 points in a year, and **40% say they plan to switch agency partners within six months.** A report that connects your work to a dollar figure is the cheapest churn insurance you will ever buy.

A great result they cannot see is worth the same to them as no result at all.

This kit fixes that in one move. It turns the report from a wall of vanity metrics into a 30-second answer to the only question your client actually asks: **did this make me money?** Every template inside is fillable. Use them this month on every account you have.

40%	48%	37%
Of clients say they plan to switch agency partners within six months	Now name delivery dissatisfaction the #1 reason they leave, up 14 pts YoY	Of clients read your reports "most of the time." The summary is the report.
Setup, 2024 Marketing Relationship Survey	Setup, 2024 Marketing Relationship Survey	AgencyAnalytics, 2024 Benchmarks

THE SWAP TABLE

Impressions prove you are busy. Revenue proves you are worth it.

Every metric on the left tells the client what you did. Every metric on the right tells them what it bought. Cross out the left column on every report you send. Replace it with the matching line on the right.

✗ Stop reporting VANITY / ACTIVITY	✓ Report instead OUTCOME / MONEY
~~Impressions & reach~~	**Revenue attributed** to our work
~~Posts published this month~~	**Qualified leads** delivered
~~Clicks & click-through rate~~	**Cost per acquisition (CPA)**
~~Followers & engagement rate~~	**Return on ad spend (ROAS)**
~~Hours worked / tasks done~~	**Pipeline added** ($ value)
~~Email open rate~~	**Booked appointments / sales**
~~Keyword rankings (alone)~~	**Revenue from organic traffic**

> **A client does not buy "impressions." A client buys "you made me $38,000 and it cost you $9,500."**

THE ONE-SENTENCE TEST

Before any metric goes in the report, ask: **can the client repeat this number to their spouse over dinner and sound like they made a smart decision?** "We got 240,000 impressions" fails. "We turned $9,500 of ad spend into $38,000 in booked jobs" passes. If the metric does not survive the dinner-table test, it belongs in an appendix, not the headline.

75% of clients prioritize conversion-driven metrics over vanity metrics, and 45% want only 1 to 5 KPIs total. AgencyAnalytics, 2024 Marketing Agency Benchmarks Report (251 agencies surveyed).

THE ONE-PAGE MONEY REPORT

One page. Five numbers. Zero confusion about your value.

This replaces your 14-page dashboard. Send it the first week of every month. Fill the red blanks, keep it to a single page, and put the headline money line at the very top where the eye lands first.

Monthly Money Report

Client: [NAME] · Month: [MONTH]

THE HEADLINE (READ THIS FIRST)

This month your marketing made you $38,400 and cost you $9,500 . **Net result: $28,900 .**

REVENUE ATTRIBUTED	QUALIFIED LEADS	COST PER ACQUISITION	RETURN ON AD SPEND
$38.4K	**64**	**$148**	**4.0x**
▲ +22% MoM	▲ +11 vs last mo	▼ -19% (good)	▲ from 3.2x

MONEY WE SAVED YOU

Cut **$1,400** of wasted spend on two dead ad sets and paused a $600/mo tool you were not using. **~6 hours/mo** of your team's time off reporting.

WHAT WE ARE DOING NEXT MONTH

Scaling the winning campaign 30% and launching a retargeting flow to the 64 leads who did not convert yet. Target: **$45K attributed.**

1 · The headline owns the top

Made / cost / net, in plain dollars. **This is the only line that has to land.** Bold the net.

2 · Max five outcome KPIs

Revenue, leads, CPA, ROAS, pipeline. **Never more than five.** Every one moves toward money.

3 · One sentence on next month

Ends every report looking forward, not backward. **It pre-sells the renewal** before they ask.

45% of clients prioritize just 1 to 5 KPIs; 75% prioritize conversion-driven metrics. AgencyAnalytics, 2024 Marketing Agency Benchmarks. Attribution should reflect your tracking setup; label estimates as estimates.

THE ROI CALCULATOR

Hand them the multiple that makes canceling feel insane.

When a client cannot connect your work to a dollar figure, you look amateur and the renewal gets shaky. So do the math for them. One formula turns "what am I paying for?" into "I put in $1 and got back $3."

THE ONE FORMULA

Client ROI multiple =
(Revenue from our work – our fee – ad spend) ÷ our fee

Put this multiple in the report and the QBR. A client who can say "every dollar I give them comes back as three" does not shop around.

Worked example. A $3,000/month retainer client. Your work generated $38,400 in revenue this month. They spent $9,500 on ad spend on top of your fee.

REVENUE FROM US	– OUR FEE	– AD SPEND	ROI ON YOUR FEE
$38.4K	-$3K	-$9.5K	8.6x

($38,400 – $3,000 – $9,500) ÷ $3,000 = **8.6x.** For every $1 they pay you, they keep $8.60 in net profit after spend. Say that out loud in the QBR and write it at the top of the report. **That is the sentence that renews the contract.**

KEEP IT HONEST, KEEP IT DEFENSIBLE

Only attribute revenue your tracking can actually support, and say so. **"Based on tracked conversions, conservatively"** beats an inflated number that collapses under one question. A client who catches you padding the math trusts nothing else in the report. If attribution is fuzzy, report leads and pipeline instead and label the revenue line as an estimate.

90% of clients prioritize overall value and long-term ROI over cost when engaging an agency. 4A's and ANA, "Cost of the Pitch II: The Rise of Value," June 2024. ROI figures are illustrative; your results depend on tracking, market, and spend.

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— PASTE THIS AT THE TOP

THE 90-SECOND SUMMARY SCRIPT

Only 37% of clients read the report. So the summary IS the report.

Paste this at the very top of every report email, above the attachment. Fill the red blanks. It is the version they will actually read, on their phone, in 90 seconds, between meetings.

The email-opener summary

Top of every monthly report email, 4 sentences max

"Quick version before the detail. In **[Month]** we generated **[64 qualified leads / $38,400 in tracked revenue]**, your cost per **[booked job]** dropped to **[$148]**, and the one thing we are changing next month to push that further is **[scaling the winning campaign 30%]**. Full breakdown attached if you want it. Net: every $1 you spent with us came back as **[$8.60]**."

2 The flat-month version

When the numbers held steady instead of jumping

"Straight version for **[Month]**. Results held steady at **[$31K attributed, 52 leads]** while we rebuilt **[the landing page / the tracking]** under the hood. That work sets up **[next month's]** push, and here is the exact number we are aiming for: **[$40K]**. No surprises, no fluff."

3 The bad-month version

Lead with it. Hiding a dip is how you lose them

"Honest version. **[Month]** was down to **[$22K from $31K]**, and here is exactly why: **[the platform raised CPMs 40% and a top ad fatigued]**. Here is the fix already in motion: **[three new creatives live Monday, budget shifted off the dead set]**. I would rather tell you straight than dress it up. Targeting **[$30K]** back next month."

A client who reads four honest sentences trusts you more than one who ignores forty pages. **The summary is not a courtesy. It is the deliverable.**

THE 5 KPIS THAT EARN THE RETAINER

More metrics do not look thorough. They look like you are hiding.

45% of clients want only 1 to 5 KPIs. Pick the five below that map to how your client makes money, and cut everything else to an appendix they will never open. Each line shows what to report and the one sentence that frames it.

1 **Revenue attributed** THE HEADLINE
Dollars your work can be traced to. **The number every other metric exists to support.** *"Your marketing made you $38,400 this month."*

2 **Qualified leads** THE VOLUME
Not raw form-fills. Leads that fit their buyer and entered the pipeline. **Count quality, not clicks.** *"64 qualified leads, up from 53."*

3 **Cost per acquisition** THE EFFICIENCY
What it costs to win one customer. **Dropping CPA is the proof you are getting better, not just bigger.** *"Cost per booked job fell to $148."*

4 **Return on ad spend** THE MULTIPLIER
Revenue divided by spend. **The single cleanest "is this working" number a client understands instantly.** *"Every $1 of spend returned $4."*

5 **Pipeline added** THE FUTURE
Dollar value of deals in motion that have not closed yet. **It shows next month is already loaded.** *"$96K in pipeline sitting in your funnel right now."*

✅ SWAP BY NICHE, KEEP IT TO FIVE

A med spa cares about **booked treatments and no-show rate.** A roofer cares about **booked estimates and cost per booked job.** An e-com brand cares about **ROAS and new-customer revenue.** Pick the five that match how this specific client counts a win. The rule never changes: **five outcome numbers, the money line on top, everything else in an appendix.**

45% of clients prioritize 1 to 5 KPIs and 75% prioritize conversion-driven metrics. AgencyAnalytics, 2024 Marketing Agency Benchmarks Report (251 agencies surveyed).

THE REPORTING CADENCE

Clients churn in silence. A rhythm is what breaks it.

The client who churned told you "I just wasn't sure anything was happening." You were working the whole time. You just went quiet. This cadence makes sure you never go dark again. Three touches, fixed days, no guessing.

EVERY
Monday

The 2-line pulse

2 min

WEEKLY · SLACK OR EMAIL

Two sentences, no attachment. **"This week: [X leads / $Y]. Focus this week: [the one thing]."** It costs you two minutes and tells the client every Monday that you are on it.

FIRST 5 DAYS
Monthly

The one-page Money Report

15 min

MONTHLY · FIRST 5 BUSINESS DAYS

The page-4 template plus the page-6 summary at the top of the email. **Send it early in the month, every month, on schedule.** Predictable beats perfect. Only 58% of agencies even report monthly. Beat them by showing up.

EVERY 90 DAYS
Quarterly

The QBR strategy review

45 min

QUARTERLY · LIVE CALL OR VIDEO

The 7-slide deck on the next page. Money made and saved year-to-date, what worked, the plan and target for next quarter. **Clients who get regular QBRs are roughly 2x as likely to renew.**

SET IT ONCE, DEFEND IT FOREVER

Put all three on a recurring calendar the day you onboard a client. The Monday pulse takes two minutes. The monthly report takes fifteen with the template. The QBR is the only one that needs real prep. **43% of client churn happens in the first 90 days**, which is exactly when a new client is wondering if anything is happening. The cadence answers that question before they have to ask it.

Only 58% of agencies report to clients monthly. AgencyAnalytics, 2024 Benchmarks. QBR renewal lift: Staircase AI, cited by Gainsight, 2024 (correlation, not a guarantee). First-90-day churn: Moxo, 2026 B2B Retention Report.

THE 7-SLIDE QBR DECK

Stop reading a dashboard out loud. Run the meeting that renews and expands.

Most QBRs are an owner narrating screenshots while nobody buys anything. A real QBR proves the money, then earns the renewal and one upsell. Build exactly these seven slides, in order. The last two are the close, do not skip them.

Promise vs delivered — SLIDE 1

The number you set last quarter, next to where you landed. **Open with the scoreboard, not the agenda.**

Money made + saved (YTD) — SLIDE 2

Revenue attributed and spend cut, totaled for the year. **"We made you $214K and saved $11K this year."**

What worked / what we killed — SLIDE 3

Two or three wins and the things you cut. **Killing dead spend proves you manage their money like your own.**

Benchmark vs their industry — SLIDE 4

How their CPA, ROAS, or close rate compares to their niche. **Context turns a number into a verdict.**

Next quarter plan + target number — SLIDE 5

The plan and one clear target. **"Next quarter we are going for $90K attributed. Here is the path."** You own the number out loud, so the renewal is a foregone conclusion.

One upsell tied to a result — EXPAND — SLIDE 6

The bottleneck now capping growth and the one service that removes it, priced. **Make it their idea by pointing at the gap on the same scoreboard.**

The renewal ask — CLOSE — SLIDE 7

A direct, low-friction next step. **"Want me to send the renewal so we keep this rolling?"** Then stop talking.

Customers with regular QBRs are roughly 2x as likely to renew. Staircase AI, cited by Gainsight (2024). 90% of clients prioritize long-term value and ROI over cost. 4A's and ANA, June 2024. Correlation, not a guarantee.

THE SWIPE FILE

Get the report opened. Reopen the quiet account.

Five subject lines that get the monthly report read, plus the word-for-word email that reopens a client who has gone silent before they cancel.

5 report subject lines

Lead with the money, never "Your Monthly Report"

1. Your marketing made you $38,400 in [Month]
2. [Month]: every $1 you spent came back as $8.60
3. 64 new leads, and the one thing we are changing next month
4. We cut $1,400 of wasted spend for you this month
5. The 90-second version of your [Month] results

The reopen-a-quiet-account email

Send the moment a client goes silent, before they churn

> "Subject: $214K and counting - quick check-in
>
> Hey [name], it has been a quiet few weeks on your end and I want to make sure we stay tight. Quick recap of where we are: this year our work has driven [$214K in tracked revenue] and cut [$11K] in wasted spend. I have one idea that could push [the result] further next quarter. Can I grab [20 minutes] Thursday to walk you through it? I will keep it tight."

A client who hears from you only when something is wrong is already half gone. **The reopen email turns silence into a strategy call** before it turns into a cancellation.

THE PROOF

Reporting is not admin. It is the cheapest retention you can buy.

When building reports feels like wasted time, that is the wrong frame. The data says the report is the relationship. Here is what the relationship is worth.

2x

More likely to renew with regular QBRs

A quarterly strategy review is the single highest-leverage retention act. Staircase AI, 2024.

25-95%

Profit lift from a 5% retention gain

Keeping clients beats replacing them by a wide margin. Reichheld, Bain & Co. / HBR, 2014.

5-25x

Cost to win a client vs keep one

A churned client is the most expensive line in your business. Reichheld, Bain & Co. / HBR.

48% **Dissatisfaction with delivery is the #1 reason clients leave, up 14 points YoY.** Most of that "dissatisfaction" is not bad work. It is work the client could not see.

Setup, 2024 Marketing Relationship Survey (400+ contributions)

81% of agency leaders rank **strong client relationships as the top retention factor**, and 67% cite communication, both above campaign performance at 49%. The report is your relationship in writing.

AgencyAnalytics, 2025 Benchmarks (220+ leaders)

15-20 **points better retention** for agencies that set realistic KPIs at onboarding versus the industry average. The Money Report is how you keep proving you hit them.

Focus Digital, Average Marketing Agency Churn: 2026 Report

READ IT ONE MORE TIME

You can keep sending the 14-page dashboard nobody opens and wonder why a client who was performing fine just canceled. Or you can send one page that says **"we made you $38,400 and it cost you $9,500"**, run the QBR that doubles renewals, and keep the clients you already fought to win. **The work is already working. This kit just lets them see it.**

YOUR NEXT MOVE

You can prove the ROI. We can build the machine that creates it.

A great report keeps a client. But the report only matters if the work behind it actually makes them money, and if a new client is always ready to replace the one who leaves. That is the chain we build and run **with you**: booked calls that show, a discovery that closes, a retention system that proves the ROI every month, all backed by the $10,000 guarantee.

Every month a performing client cancels because they could not see the value is a month you go back to grinding cold outreach to replace them. **Apply to AgencyGod now.** We onboard only a handful of agencies a month, and every spot comes with the $10,000 guarantee.

$10K GTD You get the result or you get paid **$10,000**

Apply to AgencyGod →

Free 30-min strategy call · limited monthly intake

agencygod.com

Results mentioned are real client outcomes and are not typical. Individual results vary with effort, market, and execution. The $10,000 guarantee is real and subject to the program's written enrollment agreement terms.