

Where a client launch approval gets stuck

REPORT	SAMPLE-001. Version 1.
WORKFLOW	Client launch approval. Intake to launch.
PREPARED FOR	A small agency. Invented.

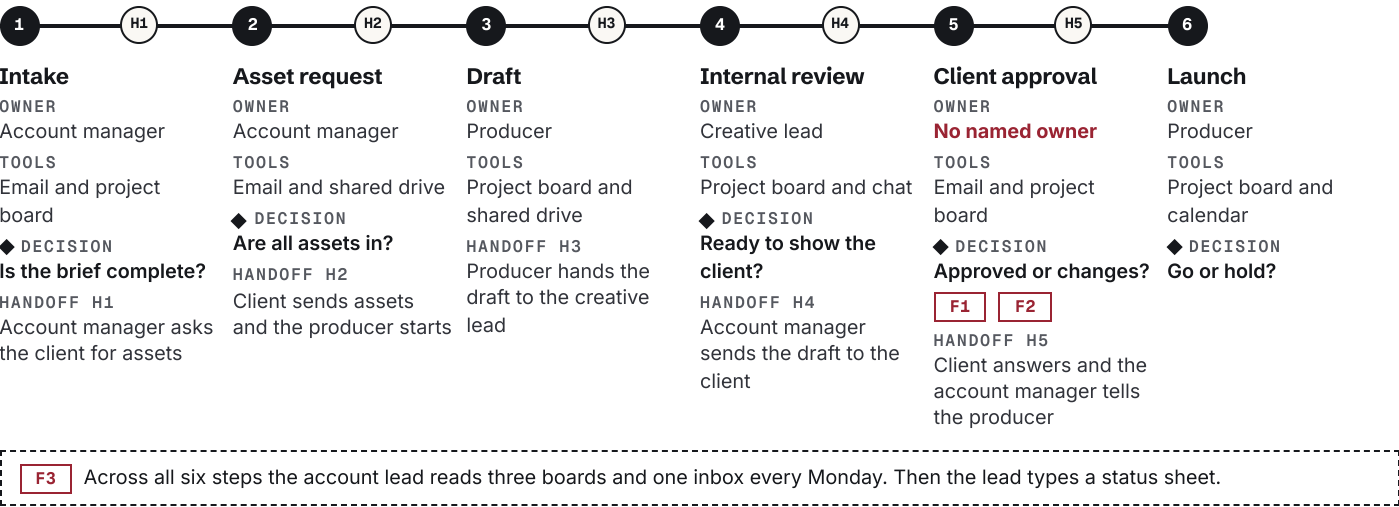
HOW THIS REPORT WAS PRODUCED	
What the agency sent A two paragraph description of the flow. Three launch threads with client names swapped for project names. One screenshot of the Monday status sheet.	Review time The review budget is 60 to 90 minutes of a person's time.
Access 3Fold had no access to the agency's systems and asked for no passwords.	Review A person read every line before this report went out.

Executive summary

The workflow	A client launch approval at a small agency. A request comes in. The team gathers assets and builds a draft. An internal review comes next. The client approves. The work goes live.
The biggest concern	A client approval can wait on nobody. In the three threads 5 of 7 approval requests had no named owner. 3 of 7 waited 4 working days or more. 1 of those 3 got a reminder.
Do this first	Name one owner for every approval and start a clock. Send a reminder after 2 working days. Flag the account lead after 4 working days.
How sure this is	Findings 1 and 2 rest on 7 requests in 3 threads. Finding 3 rests on one screenshot and the agency's own estimate. Three threads show a pattern but cannot say how often it happens.

Workflow map

Six steps. Five handoffs. Five decisions. The agency described this flow and the three threads follow it.



H

Handoff. Work moves to another person.

◆

Decision. Someone says yes or no.

F

F1 to F3. Where a finding sits.

Findings 1 and 2 sit at step 5. Finding 3 runs across all six steps.

Findings

Three findings. Each one shows its evidence. A finding appears only when the evidence supports it.

F1	Nobody owns the client approval	HIGH SEVERITY	STRONG EVIDENCE
The request goes out but no one person has to get the answer.			
COUNT	5 of 7 approval requests had no named owner. The card said "Account team".		
BOARD	The Harbor banner v2 card lists two people as assigned. Its approval owner field is empty.		
THREAD LINE	On working day 4 of the wait the team asked each other.		
	"Did Tom ever approve the v2 banner?"	PRIYA, PRODUCER	
	"I thought you were chasing that."	MAYA, ACCOUNT MANAGER	

F2	A late approval triggers nothing	HIGH SEVERITY	STRONG EVIDENCE
No rule says when a waiting approval needs a reminder or a second person.			
COUNT	3 of 7 requests waited 4 working days or more (4, 4 and 6). 1 of those 3 got a reminder.		
DATES	Harbor banner v2. Sent Monday of week 1. Reminder Friday of week 1. Approved Tuesday of week 2. Launch Wednesday of week 2.		
DATES	Ternwell homepage. Sent Tuesday of week 1. No reminder in the thread. Approved Monday of week 2 at 6 PM. Launch Tuesday of week 2.		
AGENCY DESCRIPTION	The agency's own words about follow-up.		
	"We chase when we remember."	FROM THE DESCRIPTION	

F3	The account lead builds status by hand	MEDIUM SEVERITY	MODERATE EVIDENCE
Every Monday one person copies status from three boards and an inbox into one sheet.			
AGENCY ESTIMATE	The agency says the sheet takes about 1 hour each Monday.		
STATUS SHEET	2 of 9 rows did not match the board. The Ternwell homepage row said "Approved". Its board card said "Waiting on client".		
THREAD LINE	The client had written this the Friday before. The formal approval came Monday at 6 PM.		
	"Looks good overall. One small tweak on the footer."	CLIENT CONTACT	

The evidence behind findings 1 and 2

The 7 client approval requests in the 3 threads. Days are working days from send to answer.

REQUEST	OWNER NAMED	DAYS WAITED	REMINDER
Harbor hero copy	Maya	1	No
Harbor banner v2	None	6	Yes
Harbor final page	None	1	No
Ternwell homepage	None	4	No
Ternwell checkout flow	Priya	2	No
Mossmere ad set	None	4	No
Mossmere landing page	None	2	No

LEFT OUT FOR NOW: LATE ASSETS

Two of the three threads show a file that arrived late. Two cases are too few to name a pattern. Check it at the next review.

Impact and severity

Severity comes first. A number appears only where the agency supplied the input. Every number here is a sample input.

FINDING	WHO FEELS IT	WHAT CAN HAPPEN	SEVERITY
F1	Account manager and producer	A launch waits on an answer that no one is chasing.	HIGH
F2	Producer and client	The launch date moves or the work ships on an approval that came in the night before.	HIGH
F3	Account lead	An hour a week goes to copying status. One wrong row sends a client a wrong update.	MEDIUM

High means a client launch can be delayed or broken. Medium means lost team time or a wrong update. Low means friction that leaves a launch alone.

Sample inputs

Launches a month Sample input.	10
Approval requests per launch Counted in the threads. 7 requests across 3 launches.	2 to 3
Requests that waited 4 working days or more Counted in the threads.	3 of 7
Time on the Monday status sheet The agency's estimate.	About 1 hour a week

What the inputs add up to

At 10 launches a month the agency handles about 23 approval requests.
If the 3 of 7 pattern holds about 10 of them wait 4 working days or more.
The Monday sheet takes about 4 hours a month.
Three threads are a small sample. Read these numbers as a rough size and nothing more. The report puts no dollar figure on a late approval because the agency supplied none.

Recommended fix

PRIORITY FIX

One owner and a clock for every client approval

Findings 1 and 2 share one cause. The approval step has no owner and no clock. Fixing both covers the biggest concern.

The exception list in part 3 of the fix answers finding 3.

Four parts

1 One owner per approval

Every request names one person at the agency and one approver at the client. A backup covers leave. The names sit on the card.

ANSWERS F1

2 Escalation triggers

No reply after 2 working days: the owner sends a reminder. No reply after 4 working days or 3 working days before launch: the account lead contacts the client.

ANSWERS F2

3 An exception list

One list of every approval past a trigger. It is sorted by launch date. The account lead reads it in place of three boards.

ANSWERS F3

4 Follow-ups a person reviews

The reminder arrives pre-written. The owner edits it and sends it. Nothing reaches a client without that person.

SUPPORTS F2

On the sample threads all three long waits would have drawn a reminder on working day 2. Each would have reached the account lead by working day 4.

Steps to put it in place

- Add two fields to every launch card: approval owner and client approver.
- Write the two triggers on one page. Pin it where the team works.
- Build the exception list. It is a view of every approval that has waited more than 2 working days.
- Write the reminder text once. Owners adjust it for each client.
- Run it on the next three launches. Check the list each Monday and Thursday. Review the rules after the third launch.

What you can do without 3Fold

These changes need no new software. Most project boards support them. The agency can start this week.

Make the owner a required field

Add "Approval owner" to every launch card. Set it when the request goes out.

Date every approval

Put a due date on each approval request. The launch date alone is too late.

Save one view

Name it "Waiting on client". Sort it by launch date and share it with the account team.

Check it twice a week

Read the view on Monday and Thursday. Retire the Monday sheet once the view matches it.

Ask for a date

End every request to a client with "Please reply by DATE so we can launch on DATE."

Record the yes in one place

Write "Approved by NAME on DATE" as a comment on the card.

If these changes solve the problem the agency needs no build. A diagnostic says so when it is true.

Optional build scope

This section stands apart from the findings. The plan above works without it.

A standard first build for this workflow would include

- Mapping and redesign of the launch approval workflow
- Connections to up to three of the agency's systems: the project board, email and the calendar
- The owner rule and the two triggers
- A scheduled check that measures how long each approval has waited
- One exception view sorted by launch date
- Reminder drafts that the owner reviews before sending
- Testing, deployment, documentation and a handoff to a named owner

These need extra scoping

- A second workflow such as asset requests or invoicing
- More than three systems
- A page where clients approve work themselves
- Systems that do not allow outside access
- Rules that differ for each client

\$5,000 STANDARD BUILD

One time. \$2,500 to start. \$2,500 at acceptance.

For your first standard 3Fold build. Larger or additional builds are scoped separately.

Get a report like this for one of your workflows.

3fold.me/sample-report kent@3fold.me