Client Energy Audit

Find the clients that create profit, clarity, and clean execution.

How to use: Pull your last 12 months of clients. Score each client 1 to 5 in the four categories below. Add the scores and use the interpretation guide to decide what to protect, fix, or exit.

Scoring Matrix

Category	Diagnostic question	Score 1–5
Profitability after delivery cost	After delivery cost and team time, is this client truly profitable?	
Time and attention load	Do they require constant leadership involvement, extra meetings, or ongoing exceptions?	
Process fit	Do they follow onboarding and delivery, or routinely bypass it?	
Future value	Do they create upside through referrals, case stories, reputation, or expansion?	

Total Score (add all four scores) ___ / 20

Interpretation

17–20	**Core clients** Protect these. Build marketing and delivery around them.
13–16	**Friction clients** Find the lowest scoring category and tighten scope, process, or expectations.
9–12	**Margin risk clients** Reprice, reduce exceptions, or adjust scope. Stop accepting more like this until fixed.
4–8	**Exit candidates** Transition out when appropriate, or restructure terms. These often block growth capacity.

Action Questions

1. Which 3 clients scored lowest, and what would change if they were removed or restructured?

2. For margin risk clients, what scope rule or price change would make delivery profitable?

3. What is the most common exception your team keeps making that should become a documented rule this month?

Next step: If your audit reveals clear leaks, request a Revenue Infrastructure Diagnostic to map decision rules and a simple 90 day plan.