SYNCEK

The 6-tool agency stack.

A vendor-neutral template for the 6 tools a 5 to 15 person services agency actually runs, plus the 10-step onboarding-and-archival checklist that ties them together.

SIX TOOLS. SIX JOBS. ONE HANDOFF PROCESS THAT RUNS ACROSS ALL SIX.

01	02	03	04	05	06
CRM	TIME	PROJECTS	FILES	INVOICING	VAULT

[01] THE FRAME

A 5 to 15 person agency runs 6 tools doing 6 jobs.

Most agencies this size run nine. Two of them came from the founder's solo year and nobody removed them. One is a workaround the team built when an account manager left. The other six are the real stack: a client CRM, a time tracker, a project tool, a file-delivery service, an invoicing tool, and a password vault. Anything beyond those six is the founder's solo year leaking into the team era.

The 6 tools below are listed in the order an agency adopts them. Each row carries the agency-specific rule for choosing inside the category, plus 2 to 3 vendor-neutral named picks. Two later sections turn the table into something operational: the retainer-vs-project record shape (how to model a client that has both modes), and a 10-step onboarding-and-archival checklist sized for 5 to 15 person agencies. Built from six years running a digital agency before founding Syncek, and from the closed-beta operators using Syncek today.

[WHAT THIS IS / WHAT THIS ISN'T]

What this is

- ✓ A vendor-neutral stack template. Six tool categories, an agency-specific rule per category, 2 to 3 named picks each. Syncek is one of the named CRM picks, not the only one.
- ✓ A 10-step onboarding-and-archival checklist sized for a 5 to 15 person agency.
- ✓ A printable single-page summary the team pins above the desk.

What this isn't

- A migration plan, a software pitch, or a configuration ritual.
- An enterprise agency-network ops playbook. The sizing breaks below 5 people and above 15.
- An all-in-one promise. If a vendor claims to do all 6 jobs, they do one of them well, three of them poorly, and the team will quietly run two of those jobs somewhere else anyway.

[02] THE STACK, PART 1

Three tools the agency adopts first.

[01]

Client CRM

[WHAT IT DOES]

The client book. Every account, every contact, every retainer, every active deal. The single source of truth for who is a client and what state they are in.

[THE RULE]

If your account managers can paste a client list into it in their first hour and start running the book the second hour, it stays. If it asks for a week of fields and pipelines before the first deal can be tracked, the team will be back in the spreadsheet by Friday.

[NAMED PICKS]

Syncek, Pipedrive, HubSpot Free.

[02]

Time tracking

[WHAT IT DOES]

The billable-hours ledger. Who worked on which client, on which project, for how long. The agency's clock.

[THE RULE]

Pick the one that bills by client + project, not just by hours. A 30-hour week split across 6 retainers and 2 one-off projects has to come out the other side as 8 invoiceable lines, without the account manager doing math on Friday.

[NAMED PICKS]

Toggl Track, Harvest, Clockify.

[03]

Project management

[WHAT IT DOES]

The work pipeline. Tasks, deliverables, internal deadlines per project. The place the team checks every morning.

[THE RULE]

Pick the one that fits both retainer cadence and project timelines. A 12-month retainer needs a recurring template; a 6-week brand sprint needs a Gantt-ish timeline. If the tool only does one of those well, the team will keep a parallel spreadsheet for the other one.

[NAMED PICKS]

Asana, ClickUp, Notion.

[03] THE STACK, PART 2

Three tools the agency adopts after the team is real.

[04]

File delivery

[WHAT IT DOES]

The shared drive plus the client-facing handoff. Logos, brand assets, working files, final deliverables. The thing the next account manager opens on day one.

[THE RULE]

Pick the one that survives the next account manager. A folder structure no one but the original owner can read is a handoff bomb. The agency-specific rule is one folder per client, predictable subfolders, write access scoped to the team.

[NAMED PICKS]

Google Drive, Dropbox Team, WeTransfer Pro.

[05]

Invoicing

[WHAT IT DOES]

The billing ledger. Recurring retainer invoices, project-bound invoices, taxes, payment status. The thing accounting opens at the end of the month.

[THE RULE]

Pick the one that handles retainers, one-off projects, and multi-currency without forcing the team into accounting-software territory. If the tool does invoicing only when the agency does pure project work, it will fail the first time a retainer changes price mid-year.

[NAMED PICKS]

Holded, Stripe Invoicing, QuickBooks.

[06]

Password vault

[WHAT IT DOES]

The shared-credentials store. Client logins, third-party tool access, shared API keys. The thing that has to keep working when an employee leaves on Friday.

[THE RULE]

Pick the one with team-shared vaults plus per-client folders. A single shared vault is a leak vector; a per-account-manager personal vault is an off-boarding nightmare. The agency-specific rule is one folder per client inside a team-shared vault, with access scoped to the people who actually need it.

[NAMED PICKS]

1Password Teams, Bitwarden Teams, Dashlane Business.

[04] RETAINER + PROJECT, SAME CLIENT

Model the client record as one parent with two child collections.

Most agency clients are both a retainer and a project at the same time. The 12-month brand retainer also commissions a 6-week landing-page redesign in Q2. If the CRM forces the team to pick one mode, the team will duplicate the client. From that moment, every report is wrong, every renewal date drifts, every handoff loses context.

The shape that works in any CRM that supports record relations: one parent client record, one child collection for retainers, one child collection for projects. Each retainer carries its own status (active, paused, renewing, churned) and recurring billing cadence. Each project carries its own status (briefed, in flight, in review, delivered, archived) and a bounded timeline. The parent client record carries the things that do not change across modes: the company, the primary contact, the segment, the owner.

[WORKED EXAMPLE]

A 9-person digital agency in Valencia, client roster of 38 accounts.

PARENT CLIENT	CHILD · RETAINER	CHILD · PROJECT
Bar Sant Joan, hospitality group, 4 venues. Primary contact: Marta Vidal, marketing lead. Segment: hospitality / multi-location. Owner: Lucia (account lead). Status: active.	Brand retainer, 2026. Cadence: monthly, billed first of month. Price: 2 800 EUR / month. Status: active, renews 2027 / 01. Linked invoice template: HOL-R-2026-014.	Landing-page redesign, Q2 2026. Brief signed: 2026 / 04 / 02. Delivery: 2026 / 05 / 14. Status: in review. Linked invoice: HOL-P-2026-061.

[NOTE]

If the CRM does not support relations, the fallback is a single record with two tagged blocks (RETAINER / PROJECT) inside the notes panel. Worse, but workable. The real cost shows up at renewal time, when the team cannot filter "all retainers expiring in Q1" without manually re-reading every note.

[05] ONBOARDING TO HANDOFF, PART 1

Steps 1 to 5: from signed brief to first invoice.

The 10-step checklist below runs across every tool in the stack. It is sized for a 5 to 15 person agency. A solo founder will skip half of it; a 50-person agency will need more roles than this list assumes.

STEP 01

Create the client record in the CRM.

Within 24 hours of a signed brief. Fill the parent record (company, primary contact, segment, owner). Flag retainer / project / both. If both, create the two child records on the same day.

STEP 02

File the briefing document in the shared drive.

One folder per client, named with the client slug. Subfolders: 01-brief, 02-working, 03-final, 04-archive. Link the brief from the CRM record. The next account manager finds it from the CRM, not from a Slack search.

STEP 03

Set up the client + project in the time tracker.

Create the client entity. Create one project per retainer and one project per bounded project. Assign the right people. The billable-hours ledger now matches the CRM.

STEP 04

Block the recurring touchpoints on the calendar.

Retainer cadence: monthly check-in, quarterly review. Project: kickoff, mid-point review, delivery. Calendar entries link back to the CRM record and to the project tool. The team sees the same dates from any tool.

STEP 05

Set up the first invoice template.

Retainer template if recurring; project template if bounded. Tax rates, payment terms, multi-currency if applicable. Link the invoice number to the CRM child record. Accounting now matches both the client book and the time ledger.

[06] ONBOARDING TO HANDOFF, PART 2

Steps 6 to 10: from delivery to clean archival.

Steps 1 to 5 set the client up. Steps 6 to 10 are the part most stacks ignore. The agency that gets these right keeps its clients, and keeps the engagement history when an account manager leaves.

STEP 06

Final delivery filed under /03-final.

On project delivery day. The deliverable goes into 03-final inside the client folder. The CRM child record gets a date-stamped link to the final file. The folder is no longer the working sandbox; it is the certified asset.

STEP 07

Log the renewal date on the retainer child record.

For every retainer, the CRM carries the renewal date in a structured field, not in notes. The account lead gets a calendar reminder 60 days out. The renewal conversation starts before the calendar runs out.

STEP 08

Mark the client record archived, not deleted.

On off-boarding. The CRM record goes archived, the time-tracker project goes closed, the password vault folder goes read-only. Nothing is deleted in the first 90 days. The next agency that asks for a reference can be served the right history.

STEP 09

Move the client folder to /04-archive/year/client.

After 90 days. Working access is removed, view-only stays. Naming convention is /04-archive/2026/bar-sant-joan, in order so the agency can scan a decade of archives by year. The folder is preserved, not buried.

STEP 10

Write a one-paragraph post-mortem on the CRM record.

What worked, what did not, who the next account lead should call if this client comes back. Two minutes to write, decisive value the next time the agency considers reopening the relationship. This is the brief the next account lead will read.

[07] PRINTABLE SUMMARY

Pin this above the desk.

The single page the team pins above the desk. Print at A4 or US letter.

#	CATEGORY	RULE	PICKS
01	**Client CRM**	Useable from hour one. Paste-the-list-and-go.	Syncek · Pipedrive · HubSpot Free
02	**Time tracking**	Bills by client + project, not just hours.	Toggl Track · Harvest · Clockify
03	**Project management**	Handles retainer cadence and project timelines.	Asana · ClickUp · Notion
04	**File delivery**	Survives the next account manager.	Google Drive · Dropbox Team · WeTransfer Pro
05	**Invoicing**	Retainers, one-offs, multi-currency in one tool.	Holded · Stripe Invoicing · QuickBooks
06	**Password vault**	Team-shared vaults plus per-client folders.	1Password Teams · Bitwarden Teams · Dashlane Business

[10-STEP CHECKLIST]

- ✓ 01 Create the client record in the CRM.
- ✓ 02 File the brief in /01-brief inside the client folder.
- ✓ 03 Set up the client + project in the time tracker.
- ✓ 04 Block recurring touchpoints on the calendar.
- ✓ 05 Set up the first invoice template.
- ✓ 06 File final delivery in /03-final.
- ✓ 07 Log the retainer renewal date on the child record.
- ✓ 08 On off-boarding, archive the CRM record.
- ✓ 09 Move the client folder to /04-archive/year/client.
- ✓ 10 Write the one-paragraph post-mortem on the CRM record.

[08] THE TEST

The stack the team keeps is the stack that knows what to do on the last day.

The 6 tools above are listed in the order an agency adopts them. The seventh decision, the one that weighs most, is the handoff process that runs across all six. A stack judged by what it does on kickoff day looks fine. A stack judged by what it does on archival day reveals the gaps. Six years of running a digital agency before founding Syncek taught me that agencies that get the last day right keep their clients. The first day was never the hard part.

[NEXT]

If the client CRM in row 01 is the one to rebuild first, Syncek is built for 5 to 15 person agencies that need a real client book with retainers and projects linked to the same parent. Closed beta is open at syncek.com. Paste your client list, see retainers and projects side by side on the same record by this afternoon. No credit card. No sales call. Three plans, transparent per-user pricing.

Start free

3 plans. No per-seat surprises. No sales calls.

syncek.com