

How many clients can you carry before something slips?

A 10-question scorecard for fractional CMOs. Ten minutes. You get one number and your first fix.

Ben Finklea, Fractional CMO

WHY I MADE THIS

I lost a renewal over a dashboard.

I promised a client a dashboard by next week.

It wasn't done in time. What I showed looked half complete.

The client was... nonplussed. Shrug. A wasted call. Wasted time.

That client didn't renew.

I was running five clients at once. I wasn't short on hours. I was short on memory.

Here's what I believe now: capacity isn't hours. It's how much you can keep in your head.

When you go over, strategy dies first. The early warning sign: the client starts setting the agenda.

THE SCORECARD

Answer YES or NO. Be honest. Nobody's watching.

Score 1 point for every YES.

1	Every promise from every client call goes into one written list the same day.	YES	NO
2	Notes from every client call are filed under that client the same day.	YES	NO
3	In your last call with each client, YOU set the agenda from your plan, not their requests.	YES	NO
4	Every client's plan was reviewed or updated in the last 30 days.	YES	NO
5	All your clients are in one narrow niche.	YES	NO

THE SCORECARD

6	Right now, without opening a file, you can name each client's top 3 priorities.	YES	NO
7	You start client calls ready, not spending the first 15 minutes catching up.	YES	NO
8	In the last 90 days, no client has had to remind you of something you promised.	YES	NO
9	In the last 90 days, you haven't mixed up one client's idea, number, or voice with another's.	YES	NO
10	Back from a week off, you'd know what every client is waiting on within 10 minutes.	YES	NO

My total: _____ / 10

YOUR NUMBER

Your number is how many clients you can carry right now.

0-4 YES

2-3 clients

Your head is the system. That holds for two or three clients. Client four is where promises start slipping.

#1 fix: fix your first leak (next page) before you sign anyone new.

5-7 YES

4-5 clients

Your habits are holding, until one more client lands. When it gets busy, the habits go first.

#1 fix: fix your first leak (next page) this month, while you still have room.

8-10 YES

6+ clients

Highly organized but chill. You run on discipline, and discipline costs hours. The next client tests it.

#1 fix: get what's in your head written down before client six.

Where will it slip first?

Your first leak is the first group below, top to bottom, where you circled a NO. They're in the order things break: strategy dies first. Ten YESes? No leak today, but every YES is a habit, and habits cost hours.

Strategy (questions 3, 4, 6)

You're running their list, not your plan.

Fix by hand: open every client call with your plan, and put a monthly plan review for each client on the calendar.

Promises (questions 1, 8)

Things you said "I'll..." about are falling through.

Fix by hand: keep one list. Every "I'll..." from every call goes on it before your next call starts.

YOUR FIRST LEAK

Context (questions 2, 7, 10)

You walk in cold and spend the first 15 minutes catching up.

Fix by hand: file every call's notes under that client the same day, and read them for 5 minutes before the next call.

Crossover (questions 5, 9)

Clients are bleeding into each other.

Fix by hand: one folder per client, never shared. Make your next client look like your last one: same niche.

THE NEXT STEP

You can keep doing this by hand. Or get Armbrain.

Every YES on this scorecard is a habit, and habits cost hours. Armbrain does that work for you. Check the groups where you circled a NO:

- ☐ **Promises:** Armbrain hears "I'll send that Friday" in your call notes and keeps it on your list until it's done.
- ☐ **Context:** Call notes file themselves under the right client. Meeting prep is ready in two minutes: their voice, the last three decisions, open promises, the people.
- ☐ **Strategy:** Before every call, the brief starts with that client's priorities and what was decided last time, so you set the agenda.
- ☐ **Crossover:** Every client gets its own walled-off mind. Drafts come back in that client's voice, not another client's. In one niche, what worked for one client is ready for the next.

THE NEXT STEP

You can keep doing this by hand. Or get Armbrain.

Try it free for 30 days. No card. armbrain.io

Or DM me your number and your first leak. I'll tell you where I'd start.

linkedin.com/in/benfinklea

Ben Finklea, Fractional CMO and founder of Armbrain