

Design Agency Systems Checklist

What you need at 2-10, 10-25, and 25-50 employees

STAGE 1: 2-10 Employees

Focus: Build the foundation. Your first systems determine everything that comes after.

Project Management

Single project management tool adopted (Asana, Monday, Basecamp)

Critical

All active projects visible in one place

Task ownership clear for every deliverable

Time Tracking

Time tracking tool in place (Toggl, Harvest) Critical

Team logging hours consistently

Weekly review of time vs. estimates

Documentation

Design process documented

Client communication templates created

File organization system defined Quality standards written down Important

Client Communication

 Centralized feedback system (not scattered emails) Project status update cadence defined Change request process documented

Hiring Readiness

 Job descriptions drafted for next 2 roles Onboarding checklist created First week training plan documented

STAGE 2: 10-25 Employees

Focus: Scale communication and add management layer. This is where most agencies break.

Communication Architecture

 Weekly leadership sync meeting scheduled Critical Daily team standups in place Monthly all-hands cadence set Manager-direct report 1:1s scheduled bi-weekly

Operations Leadership

- Dedicated operations manager hired Critical
- Project delivery owned by ops (not founder)
- Resource allocation process defined

Financial Systems

- AGI per FTE tracked monthly
- Utilization rates visible by team member
- Project profitability tracked Important
- 55:25:20 labor/overhead/profit monitored

Hiring System

- Standardized interview process
- Skills assessment or test project
- Culture fit evaluation criteria
- 30-60-90 day onboarding plan

Decision Rights

- Decisions that don't need founder approval documented Critical
- Spending authority delegated to managers
- Client escalation process defined

STAGE 3: 25-50 Employees

Focus: Departmentalize and professionalize. Build the leadership team that runs the agency.

Department Structure

- Creative department with clear lead

- Operations department with clear lead

- Client services department defined

- Finance/admin function in place

Leadership Team

- Department heads can make decisions without founder Critical

- Weekly executive team meeting

- Quarterly planning cadence

- Annual strategic planning process

Culture & Retention

- Career progression paths documented Critical

- Regular recognition program in place

- Professional development budget allocated

- Culture values explicit and reinforced in hiring

Financial Controls

- Forecasting system (not just tracking)

- Client profitability analysis by account

- Capacity planning 3+ months out

- KPI dashboard for leadership

Founder Role Transition

- 0% client-facing work (unless strategic) Goal

- Time allocated to external visibility

- Focus on partnerships and major clients

- Advisory/board relationships cultivated

Download from: fullstop360.com/blog/scaling-design-agency-systems-2-to-50-employees

Part of the FullStop resources for design agency owners