

Managing multi-client workspaces as an agency

How to keep client data separated, reporting clean, and your brand on everything as your agency grows inside SendKit.

One workspace per client

The default setup for agencies is one workspace per client. Each workspace keeps its own mailboxes, leads, and campaigns fully isolated from every other workspace, so a client's data never mixes with another client's, and a client with dashboard access only ever sees their own workspace. Unlimited workspaces are included on every plan, so adding client number eleven doesn't change your subscription, just your organization inside the account.

Resist running multiple clients out of one shared workspace to save a setup step. It's harder to untangle later, and it removes the clean separation you'd want if a client asks for their data back or you hand off an account internally.

Use reply tags to organize activity

Within a workspace, reply tags (interested, waiting, out of office, pricing question, meeting request) are the fastest way to keep a client's inbox organized. Tag replies consistently and anyone with client-facing access can filter straight to what matters instead of scrolling a full history.

Filter analytics by date range

Analytics supports date-range filtering, so you can pull a client's performance for exactly the period you're reporting on: a specific month, a campaign's full run, or the last 7, 30, or 90 days. Use it every time you prepare a client update so the numbers stay scoped to the reporting window.

White-label reporting

When you're ready to put your own brand on client-facing reports, white-label reporting is available starting on the Pro plan (\$499/mo). Reports carry your branding instead of ours, which matters when clients don't need to know what platform runs underneath their campaigns.

WHY THIS WORKS ON SENDKIT

Unlimited workspaces keep every client's data cleanly isolated at no extra cost, and white-label reporting means the numbers you hand a client look like they came from your agency, not from us.