

CLIENT RELATIONS & RETENTION

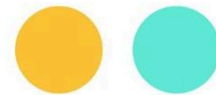
Module 5: Client Acquisition and Retention



0207-100-8788



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Client Retention Workbook

This workbook is designed to help you strengthen your client relationships, improve loyalty, and proactively reduce churn across your firm. Whether you're looking to formalise your retention process or refresh your approach, this workbook will guide you through practical steps to retain more of the right clients—long term.

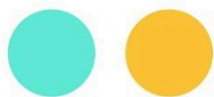
By completing the exercises, you'll identify key retention risks, optimise client communication, embed client-care practices across your team, and build a consistent, measurable retention strategy that supports firm-wide growth.

Instructions

1. **Review Your Current Retention Landscape:** Start by calculating your client retention rate, analysing churn patterns, and identifying the client groups most at risk. Look for trends and triggers that may be impacting loyalty.
2. **Map and Improve Your Client Journey:** Examine your onboarding, touchpoints, and review processes. Highlight where clients may be losing engagement or feeling undervalued—and plan improvements that add consistency, value, and a personal touch.
3. **Set Retention-Focused KPIs:** Define clear metrics to monitor team performance, client health, and satisfaction. Examples include response times, check-in call frequency, or % of clients receiving annual reviews.
4. **Empower Your Team to Support Retention:** Develop soft skills and client-awareness across your team. Plan short training sessions on relationship management, and assign ownership for key client accounts.
5. **Introduce Loyalty and Referral Enhancers:** Explore ways to deepen loyalty, such as client success stories, feedback loops, or small-value add-ons. Design simple referral incentives that encourage satisfied clients to spread the word.
6. **Track Progress and Refine Your Approach:** Set measurable retention goals and create a review routine to track performance. Regularly revisit this workbook to update tactics based on client feedback, internal insights, and market changes.

This workbook will help you shift from reactive relationship management to a proactive, strategic approach to retention. By the end, you'll have a client care system that supports loyalty, improves satisfaction, and positions your firm as a long-term, trusted partner.

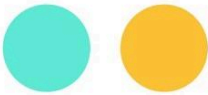
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Section 1: Understand Your Current Retention Performance

Identify Your Top 10 Longest-Standing Clients: List them below, including the length of the relationship, main services provided, and any key touchpoints that built trust.



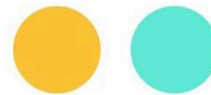


Calculate Your Current Client Retention Rate: Use this formula (Clients at End – New Clients) ÷ Clients at Start × 100

List 3 warning signs you've seen from clients who became disengaged: E.g. slow responses, fewer requests, cancelled meetings.

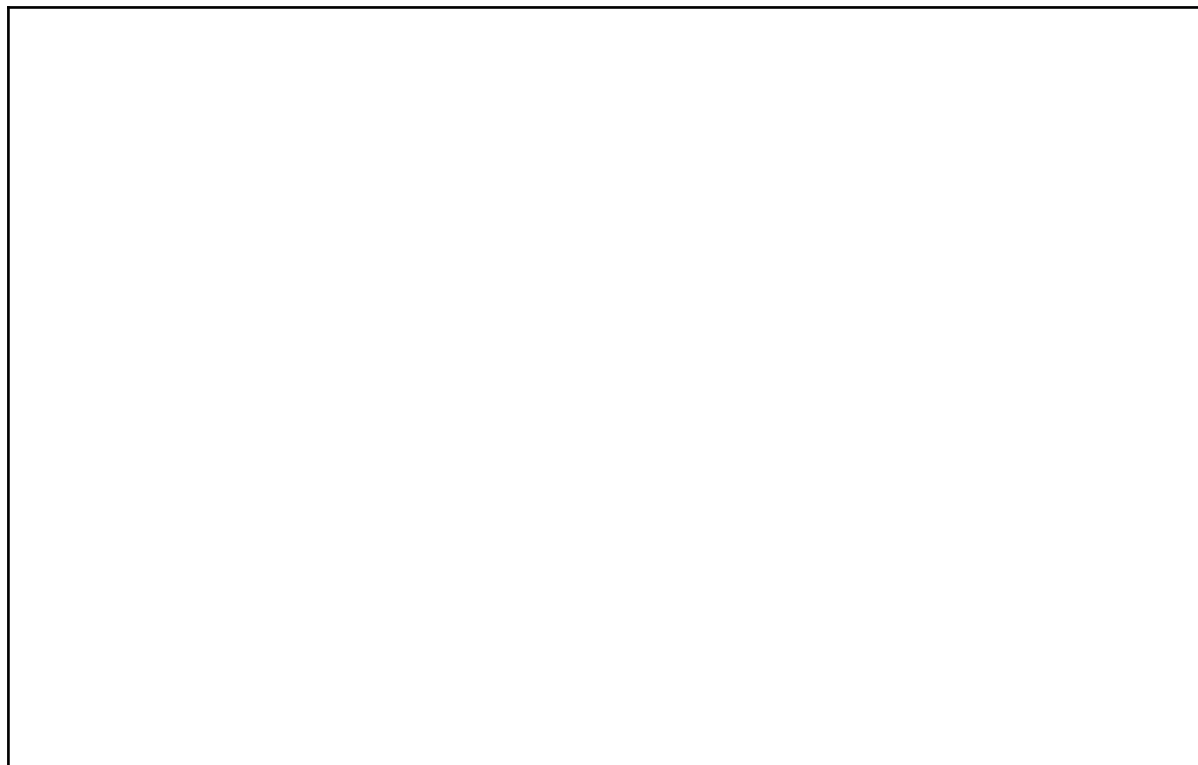
Identify Clients at Risk of Leaving: List 3–5 clients who haven't engaged recently or are showing signs of disengagement. What action will you take?



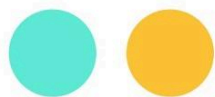


Section 2: Build Proactive Client Communication Systems

Map Your Current Client Communication Cadence: Write out how often you currently contact clients (e.g. onboarding, monthly check-ins, annual reviews).

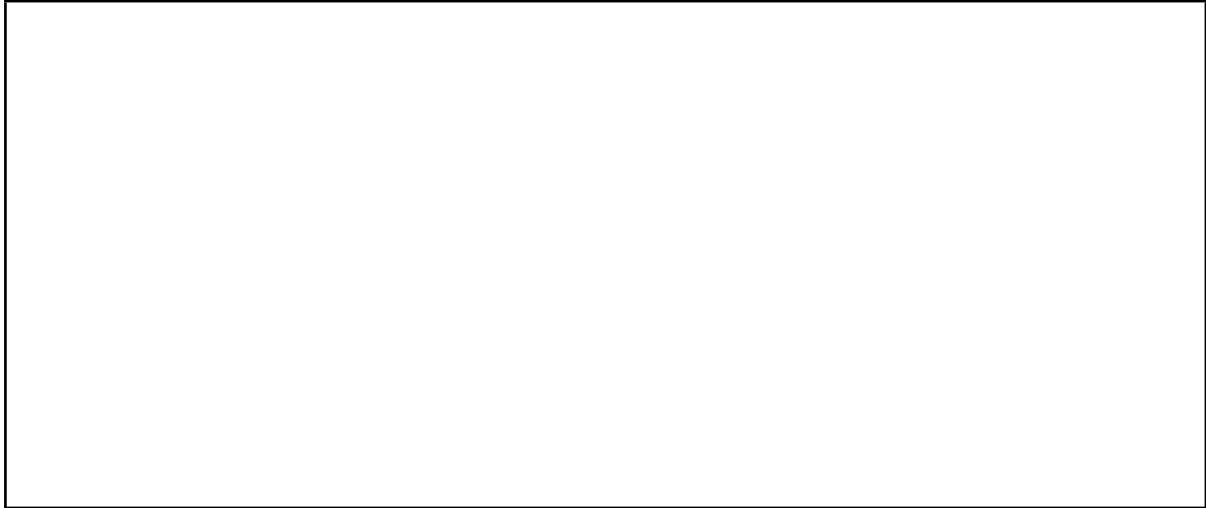


Add a Monthly Check-In Touchpoint: Pick 5–10 clients and plan a 15-minute call or email to ask about their business goals. List your chosen clients and date for outreach.





Create a Client Feedback Loop: Write a short feedback survey you could send after major touchpoints (onboarding, project delivery, year-end accounts). Keep it simple (3–5 questions).

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Improve Your Response Time: Track your average response time to client queries. Set a benchmark goal (e.g., under 24 hours) and identify ways to meet it. Plan how you can improve your response times.

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Section 3: Train Your Team

Define Client-Facing KPIs for Staff: Choose measurable indicators of retention-focused performance, such as:

- Average client response time under 24 hrs
- Monthly client check-ins completed
- Percentage of proactive insights shared



Plan a Relationship Management Training Session: Design a 1-hour session for your team on client loyalty and communication. Outline at least 3 key topics to cover.



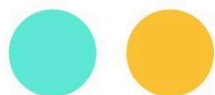


Section 4: Improve the Client Experience

List 3 small touches you can add to improve the client experience: Think handwritten cards, surprise thank-you, early delivery of work.

Create a simple referral incentive: Example: "Refer a client and receive £100 off your next invoice."

Select 3 clients to feature in your next case study, newsletter or post: This reinforces loyalty and showcases your best relationships.





Section 5: Track, Analyse & Improve Retention

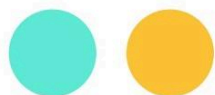
Set 3 Retention Goals for the Next 90 Days: Make them specific, measurable, and achievable.

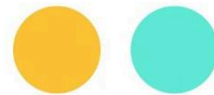
Examples:

- Increase retention rate from 85% to 90%
- Schedule feedback calls with 10 long-term clients
- Implement new referral scheme and get 3 new clients



Schedule a Monthly Retention Review: Pick a date each month to review retention data and team performance. Plan who will attend, who will chair, how KPIs will be measured. Metrics to Review: Client churn, Team KPIs, Feedback scores.

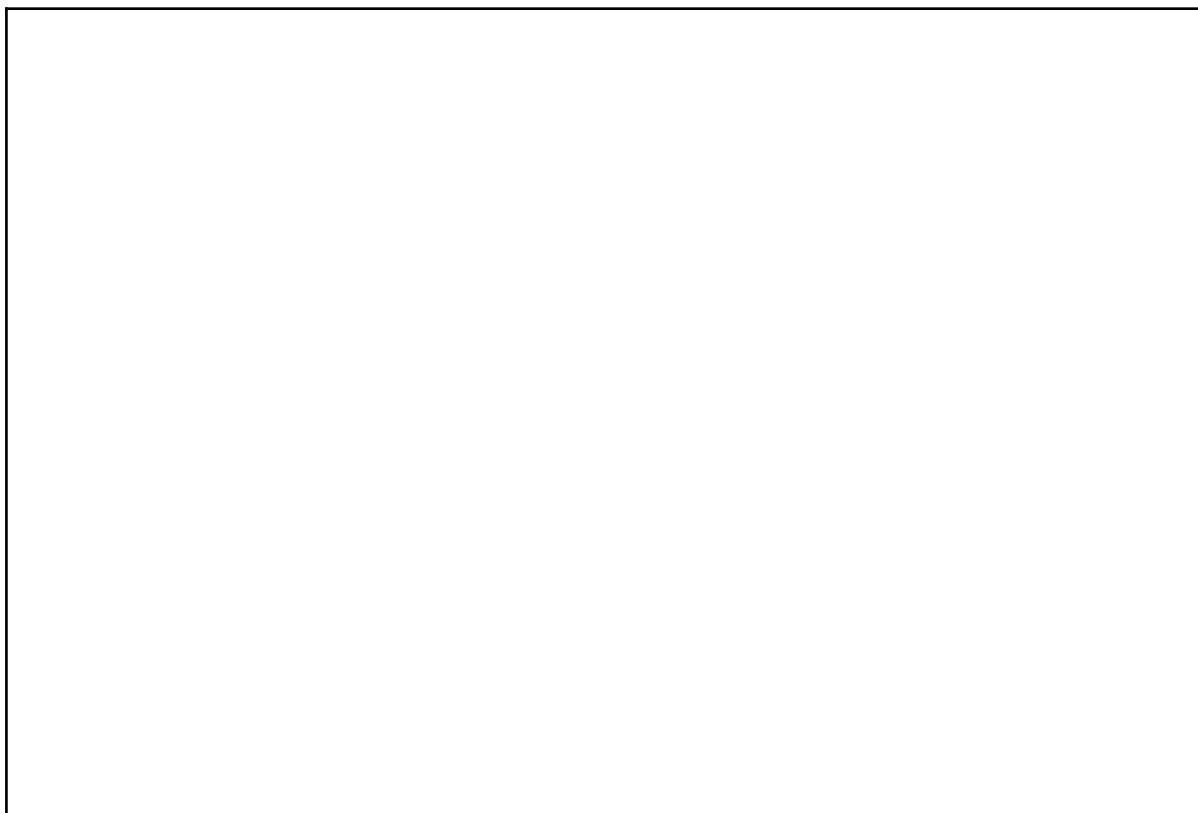


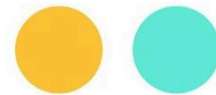


Create Client Exit Notes: For any client who leaves, write a short analysis: Why did they leave? Was it preventable? What can you improve?

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Segment Your Client Base: Group your clients into categories—e.g., high-value, at-risk, newly onboarded. For each group, brainstorm strategies for each.

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Congratulations on Completing the Client Retention Workbook!

You've taken an important step toward building a more loyal, resilient client base. By focusing not just on winning clients—but keeping them—you're creating the foundation for long-term growth, deeper trust, and stronger relationships.

Here's What to Do Next

- **Refine Your Retention Systems:** Review the strategies you've developed in this workbook—whether it's your client journey, communication rhythm, or loyalty triggers. Finalise key changes and assign owners to ensure follow-through across your team.
- **Strengthen Client Touchpoints:** Choose 2–3 areas where your client experience can improve. This could be implementing a 6-month check-in, personalising your annual review process, or streamlining feedback collection. Prioritise touchpoints that build trust and show proactive care.
- **Train Your Team on Relationship Management:** Plan a short internal training session on client communication, soft skills, and proactive service. Share examples of great client interactions and introduce KPIs that support responsiveness and loyalty-building behaviours.
- **Create a Retention Dashboard:** Start tracking your most important retention metrics. Examples include:
 - Churn rate for key service lines
 - % of clients receiving scheduled check-ins
 - Time to resolve support requests
 - Client satisfaction ratings
- **Design a Simple Retention Campaign:** Build a mini campaign around re-engaging dormant clients, celebrating client milestones, or showcasing client success stories. Use email, LinkedIn, or calls to reinforce value and reconnect meaningfully.
- **Schedule a 90-Day Check-In:** Mark your calendar now. In 3 months, review your retention data and strategy:
 - Which touchpoints are making a difference?
 - Are you seeing a shift in loyalty, feedback, or client satisfaction?
 - What should be improved, scaled, or scrapped?

Final Thoughts

Retention isn't something you fix once—it's something you build into your culture, operations, and client care systems. The work you've done here gives you a repeatable structure for increasing loyalty, reducing churn, and creating lasting value for both your firm and your clients.

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Additional Notes

Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan.

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