

THE PLAYBOOK MEMBERSHIP

BUSINESS | MODULE TEN

Client Retention

THE STICKINESS FRAMEWORK
THE EXPANSION FRAMEWORK
THE RENEWAL FRAMEWORK
THE BOOMERANG FRAMEWORK

THE STICKINESS FRAMEWORK

How do I make this client not want to leave?



Clients stay when they get value beyond the deliverables.

Make their life easier.

- Monthly planning calls
- A shared dashboard or project tracker
- Organised folders and assets
- Easy processes
- Clear timelines and communication

Help them think, not just execute.

- Recommendations based on results
- Industry trends and updates
- Opportunities they might not have noticed
- New ideas to improve performance
- Spotting problems before they become problems

Be easy to work with.

- Fast communication (slack/whatsapp)
- Proactive updates
- Reliability (be available when you say you are)
- Trust
- Setting expectations clearly

*Clients rarely leave because someone is cheaper.
They leave because they don't see enough value in what they're currently getting.*

THE EXPANSION FRAMEWORK

How do I increase retention through upsells?



One of the biggest mistakes service providers make is thinking retention and upselling are two separate things.

1. Protect

This is about helping the client maintain the results they're already getting.

Think:

- Additional support
- Regular check-ins
- Ongoing maintenance
- Retainers
- Monitoring and reporting

The client has already invested time and money to get where they are. Most people don't want to lose momentum.

2. Enhance

This is where you help them get even better results from what they're already doing.

This could be:

- Audits and reviews
- Optimisation
- Strategy sessions
- Training
- Additional consulting

You're not changing the goal, you're helping them improve the outcome.

3. Extend

This is where you solve the next problem. For example, if you've helped improve one area of their business, what naturally comes next?

This could be:

- A new service
- A larger package
- Additional support
- New projects
- Ongoing partnership opportunities

The goal isn't to sell more. The goal is to continue helping.

*A good question to ask yourself is:
"Now that I've helped them achieve this result, what's the next challenge they're likely to face?"*

THE RENEWAL FRAMEWORK

How do I prevent silent churn?



**Retention shouldn't be a conversation you have at the end.
It should be something you're working on throughout the entire
client journey.**

The easiest way to do this is by creating regular touchpoints.

30-Day Check-In

After the first month, ask:

- How are you feeling about everything so far?
- What's working well?
- Is there anything you'd like more support with?

This gives you the chance to fix small issues before they become big ones.

Quarterly Reviews

Every few months, take a step back and look at the bigger picture.

Talk about:

- Wins and progress
- Challenges
- What's changed in the business
- New goals and opportunities

This helps clients see the value you're providing and reminds them why they hired you in the first place.

Future Planning

Don't just talk about what's happened. Talk about what's next.

Ask questions like:

- What are you focusing on over the next few months?
- Are there any upcoming launches or projects?
- What does success look like for the next quarter?

The more you understand where they're heading, the easier it is to support them long-term.

If you're regularly showing progress, having conversations about future goals, and checking in before problems arise, you're giving clients far fewer reasons to look elsewhere.

THE BOOMERANG FRAMEWORK

How do I get clients to come back later?



Sometimes clients leave because budgets change.

Sometimes they hire internally.

Sometimes priorities shift.

Sometimes they simply don't need the service right now.

That doesn't mean the relationship is over.

Leave on a High

When a project or contract comes to an end, don't just disappear.

Make the final experience just as good as the first one.

I always love to send a fully loaded offboarding email.

This could include:

- Organised files and assets
- A handover document
- Final recommendations
- Next-step suggestions
- A thank-you message

You want the client to leave thinking:

"That was such an easy experience."

Keep the Relationship Warm

Just because someone isn't paying you right now doesn't mean they stop existing. Stay connected.

This could be:

- Continue liking their content
- Congratulating business milestones through DMs
- Leaving comments on posts.

Notice that none of these involve selling.

You're simply staying visible.

Stay Visible

One of the easiest ways to bring past clients back is to remind them of the value you created in the first place.

Don't stop talking about the work just because the project is finished.

Share:

- Results and wins
- Before-and-afters
- Case studies
- Behind-the-scenes content
- Lessons learned from the project

Not only does this attract new clients, but it also puts you back in front of former clients.

They go back to someone they already trust.

So don't treat offboarding like the end of the client journey. Treat it as the beginning of a future opportunity. The best client relationships don't always run continuously. Sometimes they leave, grow, change direction...

Client Retention Habits



The small things that make a big difference:

- Reply when you say you will
- Communicate before the client asks
- Celebrate their wins like they're your own
- Look for solutions, not just tasks
- Keep notes on important details they mention (have an area where you keep all their details)
- Check in even when you're not selling something (drop a comment or message)
- Make them feel looked after, not managed (don't be afraid to educate them on your skill)

YOUR PLAYBOOK PRACTICE

Action Task

YOUR PLAYBOOK PRACTICE

Take 10–15 minutes to practice:

The Expansion Exercise:

Choose your most popular service.

Now answer:

- What problem does this service solve?
- What problem will the client have next?
- What service could help solve that next problem?

Create a list of 3 suitable upsell opportunities that would genuinely benefit your clients. (an upsell service).



TURN THE PAIGE

and follow The PlayBook

NEXT UP: HANDLING SLOW SEASONS & INCOME FLUCTUATIONS