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The Client Retention Consultation System

An end-to-end walkthrough of how we audit, design, and implement client retention systems and the thinking behind every step.

● Phase 1: Discovery

● Phase 2: Retention Audit

● Phase 3: Framework Design

● Phase 4: Implementation

● Phase 5: Advocacy Activation

● Phase 6: Optimisation

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The Core Philosophy

Why we built the retention system the way we did

Answering The "Why Retention Even Works?"

Most retention failures happen because there's no system, just good intentions. Clients leave not because they're unhappy with your work, but because the relationship never got the structure it needed. We build that structure before churn has a chance to start.

Relationship Before Revenue

We design the client experience so trust is built systematically from onboarding to expansion ask. Retention starts before the contract is signed.

System Over Goodwill

Good service isn't enough. Without check-in cadences, feedback loops, and clear expansion triggers, even great work leads to quiet churn.

Compounding Retention

Every retained client reduces CAC, increases LTV, and eventually becomes a referral source. The system gets stronger with every client relationship.

Retention Audit		System Design		Advocacy Activation		Retained & Referring
Find where trust breaks down	+	Build what keeps clients	+	Turn clients into referrers	=	

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Why Most B2B Clients Churn

The 5 gaps we close before we even start

SILENT SIGNAL	WHAT GOES WRONG	HOW WE FIX IT
No Onboarding System	Clients start confused. Expectations never set. The relationship starts with ambiguity.	**Design a structured 30-day onboarding with clear milestones, check-ins, and expectation-setting from day one.**
Month-3 Drop-Off	Enthusiasm fades after delivery. Without a structured check-in cadence, trust erodes silently.	**Build a check-in calendar with proactive touchpoints at weeks 2, 6, and 12 before the client feels ignored.**
Silent Dissatisfaction	Clients don't tell you they're unhappy. They just stop renewing. By the time you notice, it's already over.	**Implement a simple NPS + feedback loop at key milestones, creating safe space for honest early signals.**
No Expansion Triggers	Happy clients who could upgrade or refer never get the ask. Revenue stays flat even as trust grows.	**Map expansion opportunity moments into the client journey so the upsell ask happens naturally, not awkwardly.**
Referrals Never Activated	Your happiest clients never become referrers not because they won't, but because you've never built the moment to ask.	**Embed a referral ask into the 90-day journey at the moment client satisfaction peaks not as an afterthought.**

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Discovery & Retention Audit

Phase 1 & 2 — Getting everything right before we design anything

01	02	03	04	05	06
Onboarding & Discovery	Retention Audit	Framework Design	Implementation	Advocacy Activation	Optimise & Refine
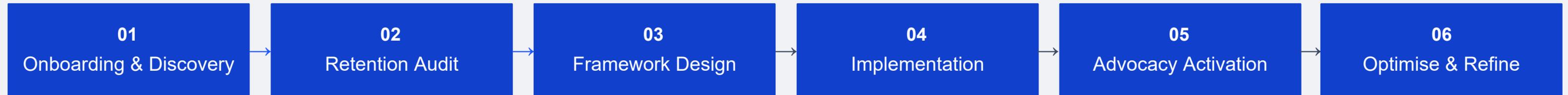
PHASE 01

Onboarding & Discovery

We begin with a detailed onboarding session covering your current client base, delivery model, past churn experiences, and what an ideal long-term client relationship looks like. We then run a kickoff call to capture what the form can't like tone, team dynamics, and what makes your best clients stick.

WHY THIS MATTERS

Retention strategy built without your context is just theory. The more specifically we understand your client relationships, the more precisely every downstream recommendation will fit your reality.

PHASE 02

Retention Audit & Journey Mapping

We audit your full client lifecycle from first touchpoint to renewal or churn. We map every interaction, identify gaps in communication cadence, and pinpoint the exact moments where client trust erodes. We use this map to build the retention system around your real delivery model.

WHY THIS MATTERS

The narrower and more specific the audit, the better every downstream system performs onboarding cadence, check-in frequency, expansion triggers, and advocacy ask timing.

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Framework Design & Onboarding

Phase 3 & 4 — Building the retention infrastructure

01 Onboarding & Discovery	02 Retention Audit	03 Framework Design	04 Implementation	05 Advocacy Activation	06 Optimise & Refine

PHASE 03

Custom Retention Framework

We don't use a generic retention template. We design a system built specifically around your offer, team size, and client profile. Includes check-in cadence, satisfaction feedback loops, milestone celebrations, and proactive churn-signal detection. Practical enough to run this week. Scalable as you grow.

→ **Check-In Cadence**
Week 2, 6, 12 cadence

→ **Feedback Loops**
NPS + milestone reviews

→ **Expansion Triggers**
Upgrade moment mapping

→ **Churn Signals**
Early warning detection

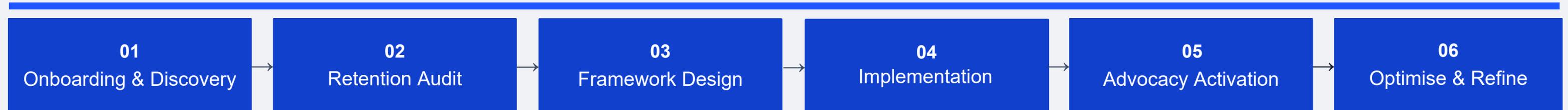## PHASE 04

Onboarding Playbook Design

We rebuild your client onboarding from the ground up. The playbook covers expectation-setting, first 30-day milestones, communication templates, and relationship-building touchpoints so every new client starts their journey with clarity and confidence rather than ambiguity.

WHY THIS MATTERS
Before clients can be retained, they need to feel set up for success from day one. The onboarding experience sets every expectation that will either be met or broken over the following months.

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Implementation

Phase 5 — How we roll out the system with you

01	02	03	04	05	06
Onboarding & Discovery	Retention Audit	Framework Design	Implementation	Advocacy Activation	Optimise & Refine

Onboarding Playbook Live
Week 1
First-30-day framework activated for new clients

Check-In Cadence Running
Week 2
Automated + personal touchpoints at key milestones

Feedback Loops Active
Weeks 3–4
NPS surveys + satisfaction reviews embedded in delivery

Expansion Triggers Mapped
Month 2
Upgrade conversations built into the journey at natural peaks

IMPLEMENTATION PRINCIPLES

RULE 01
Start with existing clients
Don't wait for new clients to test the system. We roll out the check-in cadence with your current client base immediately where the impact is highest.

RULE 02
One system before adding more
We implement one retention component at a time. Trying to deploy everything at once creates noise. Sequential rollout creates adoption.

RULE 03
Human-first, tools second
Retention systems only work when people actually use them. Every framework is designed to fit into your existing workflow not require a new one.

⚡ Why founder involvement matters: Retention systems require your voice, your context, and your relationships. We design them but you bring them to life.

Advocacy & Optimisation

Phase 6 — How we track, refine, and turn clients into referrers

WHAT WE TRACK

Retention	Satisfaction	Expansion	Advocacy
→ Active client count	→ NPS scores	→ Upsell conversations	→ Referrals generated
→ Renewal rate %	→ Feedback response rate	→ Expansion revenue	→ Testimonials captured
→ Average contract length	→ Satisfaction trend	→ Upgrade rate %	→ LinkedIn shoutouts
→ Churn rate (monthly)	→ Issue resolution time	→ Account growth %	→ Referral conversion rate

THE 60-DAY TIMELINE

WEEK 1
Audit Complete + Framework Drafted
Nothing changes until we understand your current client experience fully.

WEEK 2
Onboarding Playbook Live
New clients enter a defined system. Existing clients get proactive check-ins.

WEEKS 3–4
Check-Ins Running + Feedback Active
Satisfaction data coming in. Churn signals identified and addressed early.

MONTH 2
Advocacy Ask Activated — Target: 2+ Referrals
Expansion conversations start. Advocacy system running. Compound retention begins.

⟳ Why retention compounds

Most client losses peak in months 1–3 and could have been prevented.

Every retained client reduces your cost of acquisition, increases lifetime value, and when the advocacy system is running generates new clients through referrals.

We use every month's data to tighten the system: month 3 outperforms month 2, and month 6 outperforms month 3.

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Who This Service Is For

Built for B2B founders who already have clients to keep

✓

You're winning LinkedIn leads but losing clients

You're generating meetings consistently, but not retaining clients long enough to see real LTV from the work.

✓

You've had at least one client leave unexpectedly

You're not completely sure why they left. The system you have is improvised, not structured.

✓

Your onboarding isn't repeatable

It works, mostly but it's different each time, and you know it could set better expectations.

✓

Happy clients who've never been asked for referrals

You have long-standing clients who clearly value you, but no structured ask has ever been made.

✕

You haven't yet signed your first clients

This service is designed for founders with an existing client base not pre-revenue.

✕

You're looking for done-for-you customer success

This is strategic advisory. You'll need to implement the frameworks. We design, you deploy.

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The clients you already have are your most valuable growth asset.

A 30-minute strategy call is the first step. We'll review your current client experience, identify the biggest retention risks, and map out what an engagement would look like for your specific business.

Book a Strategy Call →
30 min · Free · No obligation