

Client Retention Checklist

Clients do leave, but use this list and they'll stick around twice as long.

Action

- ☐ Send birthday and holiday cards.
- ☐ Never withhold anything from your client. Always share with them your concerns about them, a problem they are causing you, a fear you have about them. Don't censor or try to phrase it "right". Get it OUT!
- ☐ Tell your client what you want for them as often as you can.
- ☐ Give flowers, a gift for their desktop, something special whenever they have a big win or need a lift.
- ☐ Always make the client pay by the beginning of the month. Accept NOTHING else. Don't be nice.
- ☐ Have a full practice **and** a waiting list.
- ☐ Have a written agreement of at least 3 months.
- ☐ Underpromise ALWAYS. Never even hint that you can produce miracles.
- ☐ Don't get into the client's (or your own) personality or issues - keep the focus on actions, distinctions and coaching.
- ☐ Be known for delivering the message, not for figuring out how to best run the client's business.
- ☐ Speak with your client at least once per week between calls.
- ☐ Invite your client to social events: Dinner, special luncheons. Make it social, but only talk about them, not yourself.
- ☐ Schedule special workshops for clients and their friends ONLY.
- ☐ Don't push your clients for referrals - let them know you appreciate the referrals, but don't bug.
- ☐ Send out a quarterly letter or newsletter to keep your clients abreast of all that you are doing.
- ☐ Get the client focused on a very big and exciting goal or project. Challenge them, don't coddle.
- ☐ Don't put up with anything - missed calls, late to a call, complaining.

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