# A MARKETING AGENCY'S GUIDE TO CLIENT RETENTION

# INTRODUCTION

As a marketing agency, the success of your business relies on retaining your clients. And just like any service-based business, in order to really succeed, you need to go above and beyond to make sure your clients stay happy.

According to *State of Digital*, some commmon perceptions clients have of agencies are: (1) agencies do not understand what their business does, (2) agencies do not understand how their business works, (3) agencies have slow response times, (4) agencies overpromise and underdeliver and (5) agencies are lazy.

Client retention requires a better understanding of how your clients think, followed by proactively delighting them. This guide will show you how to do that.

## This guide will help you retain clients by:

1. Helping you identify and solve problems *before* they happen.
2. Showing you how to increase MRR and reduce client churn.
3. Helping you inform and WOW your clients with beautiful reports.

# HOW TO IDENTIFY PROBLEMS BEFORE THEY HAPPEN

## 1. Set goals together

The first step in avoiding an upsetting client call is to make sure you are on the same page from the get-go. You do this by setting goals together.

- **Analyze the current position of your clients to set achievable goals.**
- **Remind clients that it takes time for websites to grow organically. Set smaller and more obtainable goals at the beginning of the relationship.**
- **Discuss the performance metrics that will determine success, and make sure each one can be measured.**

## 2. Document your conversations

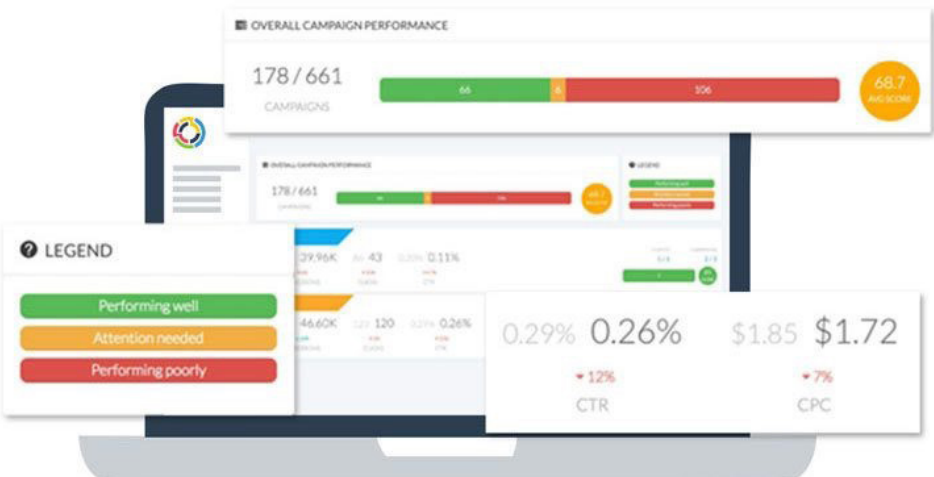
Record your interactions by taking notes, sending follow up emails, and making metrics available to all of your staff. A well documented client relationship will help you avoid unnecessary frustration and arguments about what was agreed to and what was not. It will also ensure that you are both on the same page.

## 3. Call your clients often

While email is an excellent communication medium, the phone is much better tool for identifying issues before they become difficult problems. Take the time to prepare for your calls in advance so you aren't caught off guard by a question, and schedule additional time in case the call runs long.

## 4. Be transparent

The more transparent you are with your clients, the more they will trust you. One of the best ways to be transparent is to [create a dashboard] that reports on the current status of the goals you set up together. If the client sees something that concerns them, it can be discussed before it becomes an unpleasant surprise.




## 5. Keep improving

Everyone in marketing understands how different variables can affect a marketing campaign, whether it be social media, paid search, SEO or email marketing. When you are aware of industry changes and monitoring KPIs, you can preempt problems, come up with better solutions and and turn a good campaign into a great campaign.

# HOW TO USE TEAM EFFICIENCY TO INCREASE MRR & REDUCE CLIENT CHURN



*The more efficient you can be, the more money and time you can dedicate to other tasks. Working smarter helps you grow your business faster and more economically.*

## 1. Focus on your strengths

Evaluate the strengths of your team and then hone in on your collective superpowers. When you focus on the services that you can provide better than anyone else, you'll find that productivity increases and your company grows.

## 2. Invest in management tools

Project management software can give your team a one-stop spot with all of your to-dos, documents, calendars, files, and follow-up appointments. Without some type of project management software, it can be difficult to keep everyone on the same page.

## 3. Use virtual meeting software

Everyone is busy, and it is difficult getting everyone in the same room, especially if your team works remotely in other cities or countries. An efficient way to meet is to use software like Slack, Google Hangouts or Join.me.

## 4. Make file sharing easy

It is important to make your documents and data available to everyone on your team. Similar to using virtual meeting software, cloud file servers make it easy for everyone to have access to all of the same files, documents, and resources needed in order to work well together. We recommend using Google Docs or DropBox.

## 5. Automate your marketing data

There is no longer a need to export and analyze data by hand thanks to software like TapReports. Using a software solution like this can help you and your team save time and money by automating all of your analytics and reporting.

**TapReports Automation Features:**

- ✓ A database that everyone on your team and your clients can access
- ✓ Standard and updated information
- ✓ Real-time reporting capabilities
- ✓ Automated reporting tools
- ✓ Ability to streamline processes
- ✓ Campaign data connectors
- ✓ Easy set-up
- ✓ Intuitive navigation and dashboard tools
- ✓ White label options
- ✓ Campaign customization options
- ✓ Data numbers along with data visualization tools

## 6. Partner with talented agencies

If you are great at online advertising, but don't offer email marketing services, consider using an email marketing partner that can help you manage those campaigns for you. Using that approach will allow your team to focus on what they do best while still providing comprehensive marketing services to your clients.

## 7. Add workflow automation

Workflows are automated actions that are set off by someone's contact information, website action or purchasing behavior. Rather than trying to guess at what your customers want or the best way to reach various individuals, you can set up workflows to do it for you.

**Top ways to use workflows:**

- **Send quality leads to the right people on your team**
- **Update contact information**
- **Target leads with personalized marketing content**
- **Segment your lead information properly**
- **Diversify the emails you send to clients based on their actions**
- **Match the right promotions up with the right clients**
- **Nurture leads that aren't quite yet ready to buy**

# HOW TO AUTOMATE REPORTS TO INCREASE CLIENT RETENTION

*The last piece of the puzzle for increasing client retention is learning how to turn campaign data into gorgeous automated reports. Here are three report examples that we think your clients will love.*

## 1. The Social Media Report

Social media marketing is a great way to attract customers, create a following, and get new leads. However, it is tedious to manually login and gather performance results for each social profile on each network. It is even more tedious and time-consuming to analyze the data and create a presentable report to clients. That is where an automated reporting solution like TapReports can save the day.

**TOP METRICS TO INCLUDE IN YOUR SOCIAL MEDIA REPORTS:**

**Awareness metrics** – Track metrics like Volume and Reach across all of your social media channels. This will help you know how well your message is getting out to your fans.

**Engagement metrics** – Understand how people are interacting with your client's brand by automatically reporting on retweets, comments, replies and more.

**Conversion metrics** – Learn which social networks and posts are driving the most traffic and conversions for your client's website.

With TapReports, you can create beautiful social media reports that are automatically generated and sent to directly to your clients.

## 2. The Paid Advertising Report

Paid search is a powerful way to grow your business, but quite often it is an easy way to waste money. The best way to make sure you are spending money on the most effective ads is to track performance closely using automated reports.

**TOP METRICS TO INCLUDE IN YOUR PAID ADVERTISING REPORTS:**

**Impressions** – Impressions will tell you how many views your paid search ads are getting.

**Clicks** – Clicks tell you how many people actually clicked on your ad.

**Average CPC** – Average CPC is the average of how much money you are spending on each click.

**Spend** – This tracks how much you are spending on your campaign overall.

When you rely on **automated reporting**, all the hard work is done for you. You can quickly review the results and insights, and then better utilize the time you saved by sharing those insights with your clients.

## 3. The Email Campaign Report

Email campaigns continue to be one of the most effective ways to market. Unfortunately, they are not easy to do well, and they require lots of testing and paying close attention to metrics like open and click rates.

**TOP METRICS TO INCLUDE IN YOUR EMAIL CAMPAIGN REPORTS:**

- **Open rates**
- **Click rates**
- **Conversion rates**
- **Best time to send an email**
- **Lost contacts/Growth rates**
- **Bounce rates**
- **Device types (computer, tablet, smart phone)**
- **ROI**

Automatically creating and sharing these types of reports provides a level of transparency that encourages your clients to trust you and stick with you longer. They also offer keen insights into how you can improve future email campaigns.

## Benefits of Automated Reports

- **Increased Productivity**
  By automating reports, you and your team don't have to wait around for someone to generate, read, analyze and share a report.
- **Time Saving**
  While it may require a little extra time to set up initiallly, automated reporting generally save users at least 4 hours a week.
- **Increased Accuracy**
  Automated reports are incredibly accurate, so you can worry less about human error.
- **Easy to use**
  It can be difficult to sift through the numbers to find the ones that are vital to analyze. With automated reports, the sorting is done for you.
- **Customizable**
  With report automatization, you have the ability to customize and receive only the report data you need.
- **Less Expensive**
  Let's face it, the cost of hiring someone to collect, analyze and format data is much greater than letting software do it automatically.

# CONCLUSION

*To summarize, it is an agency-eat-agency world out there, and any edge you can get to retain clients and improve client satisfaction is critical. So how can you keep your clients happy? We encourage you to use the information provided in this guide and remember these key points:*

1. **Identify problems before they happen through open communication, collaborative goal setting and continuous optimization.**

2. **Increase your team efficiency with technology designed to streamline project management, collaboration and reporting.**

3. **Impress your clients with fast, affordable, highly accurate reports by automating your reporting process.**

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to find out more about TapReports or schedule a demo.

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