

SEO client retention checklist

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RESOURCE

How to keep your clients

It's been said that it costs 5-25 times more to acquire a new customer than to retain an existing one. Based on my nearly 15 years of SEO experience, I share with you some of my best tips for keeping your clients happy. Check off the full list below and I can almost guarantee you that your existing customers will be eager to sign future contract extensions.

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Client onboarding



① Managing client expectations

Without a doubt, not meeting your clients' expectations is the quickest way to lose them. Starting at the beginning of the sales process and through the onboarding process, it is critical to establish proper expectations.

② Mutually agreed upon KPIs

This goes hand in hand with setting proper expectations. From the very beginning both the client and service provider need to be on the same page regarding WHAT your campaign is looking to impact. Many SEOs can get caught up in KPIs such as ranking or organic traffic when in reality, only revenue is (often) what's most important to clients.

③ Open lines of communication

A common complaint I hear from clients switching providers is lack of communication. The client often feels that their questions are not being answered and/or that they aren't appropriately informed on progress being made against the SEO campaign.

Consider outlining communication expectations within your scope of work — how often will you be meeting with the client? Will email or Slack/Teams be utilized for one-off communications? How will reporting be handled? Answering these questions upfront can avoid this issue entirely.

④ Honesty and transparency

No client ever likes to hear bad news. However, I can guarantee that what they don't like more is being lied to. If tasks weren't completed, performance is down or something didn't work as expected — be transparent.

While the leash is only so long, you'll find that most clients are much more willing to be flexible and adapt to the current situation when the service providers are upfront and transparent. These two traits build reliability which is essential to any successful client/provider relationship.



⑤ Data-driven reporting

Reporting can often work in two ways:

1. Establish a narrative and use the existing data to support what you want to achieve.
2. After pulling and reviewing the data, create a narrative based on the data that is available.

Many may think the two reports above are the same but they are not. Anyone can manipulate the data to find a positive angle. The second type of reporting takes a genuine approach to measuring success and relies exclusively on data. This includes the good, the bad, and the ugly.

Reporting is critical in measuring against the KPIs you set early on in the engagement. Manipulating the narrative does nothing but cause distrust between client and service provider.

⑥ Performance narratives (more than just reporting)

We discussed data-driven reporting above. The metrics themselves are important but the WHY behind the data is even more critical. Performance is up significantly? WHY? Is a section of the website performing worse than the rest of the website? WHY?

Reporting always requires the actual data but if you want to get on your client's good-side, you'll help craft the "WHY" aka the narrative for what the data they're staring at means.

⑦ Be professional

This may seem like a "duh" moment but professionalism is often subjective and requires a keen eye for "reading the room." Being professional to some may be about dressing the part, for others it's the tone and manner in which you communicate.

You don't need to become best friends with clients but I can guarantee that if you don't build a professional relationship with them that your engagement will struggle to be a long lasting one.

⑧ Be reliable

Sometimes the bar is set low...very low. The number of companies I've talked to that were impressed by following up on a promise made, sending deliverables on time and even responding to questions within a timely manner is insane.

As a service provider, everyone should shoot to under promise and over deliver. Once you start losing a client's trust and are deemed unreliable, that is the day they start looking to hire your replacement.

⑨ Listen and pivot

As service providers we often have “best practices” that are essential to find success. Sometimes not every best practice or initiative can be executed. This is a situation where it’s critical to listen to your clients. Why can’t something be done? Is it a situation where pivoting to an alternate solution provides a similar result? Or is this a 100% roadblock?

Too often service providers can get stuck in a pattern of waiting for XYZ to get completed before moving to the next step within the process. It’s critical to be able to pivot and keep pushing forward — even if it means certain best practices not being checked off. The only thing that is worse than a less than stellar implementation is taking no action.

Maintain engagement



⑩ Be proactive

I’ve seen clients be 100% happy with their service providers but make a change simply to “change things up” and make sure they aren’t getting stagnant. One way to help avoid the “grass is greener” situation is to push to be as proactive as possible. Seeing a new trend? Share it with your clients before they see it.

Go outside the scope of your work to support company-wide initiatives. As service providers we want to keep our scopes tight but companies want to partner with individuals/companies that they believe have their back. Being proactive is one of the best ways to do this.

Client onboarding

Set client expectations during onboarding

- Understand your client's goals
- Review their existing performance
- Understand the total addressable market
- Assess the value of the SEO opportunity
- Agree on your expected outcomes, in writing

Agree on KPIs

- Determine what metrics should be impacted by the SEO campaign
- Outline the timeframe for implementation
- Outline the timeframe for results
- Forecast rough ROI

Open lines of communication

- Establish how often you will meet
- Decide on your channels. Email? Slack?
- Agree on how reporting will be handled
- Identify the best contacts for day-to-day communication and strategic conversations
- Emphasize transparency and honesty

Working together

Data-driven reporting

- Create a report that suits your client's needs
- Include wins and areas for improvement in the report
- Pull and review data that measures your KPIs
- Summarize the data for your client in an accessible way
- Explain why specific activity occurred

Client relations

- Be professional in your interactions with clients
- Respond promptly to emails, questions & queries
- Listen to your clients to prioritize implementations
- Pivot in order to find ways to move forward with SEO

Maintain engagement

Be proactive

- Seeing a new trend? Share it with your clients before they see it
- Go outside the scope of your work to support company-wide initiatives
- Introduce new initiatives to reduce stagnation
- Communicate plans to respond to trends/updates