

Freelancing Client Retention Checklist

(Keep & Get More Value From your Existing Customers)

Section 1. Stand out with differentiation

Stand out from the competition by differentiating your brand.

- Offer niche services.
- Differentiate by pricing differently.
- Build a consistent and compelling brand identity as a freelancer.
- Design an SOP or SLA that guides you to deliver unique purchase and post-purchase customer experiences.
- Support a cause to give back to society.
- Go green to differentiate through sustainability.
- Find alternative uses for your services.

Section 2. Prioritise customer satisfaction

Learn to exceed customer expectations.

- Craft compelling value propositions for each service.
- Design guidelines on how to deliver on those promises to meet customer expectations.
- Identify the extra hidden value to offer customers to surprise them and exceed their expectations.
- Design a framework or questionnaires that help customers discover the root cause of their problems to let you align solutions accordingly.

- Invest in customer relationship management (CRM) software.

3. Offer tiered services

Use tiered pricing to cater to all customer segments.

- Define your core services.
- Analyse the market to understand client preferences, needs and budget constraints.
- Create distinct service tiers based on features and scope.
- Determine pricing for each tier.
- Clearly define the deliverables.
- Emphasize the value clients receive at each tier.
- Outline payment schedules, cancellation policies, and other conditions.
- Identify upselling and cross-selling opportunities.
- Share case studies or success stories related to each tier.

Section 4. Boost return rate with cross-selling

Cross-sell existing customers to improve average order value.

- Design complementary services for each service you offer.
- Craft a compelling value proposition for each.
- Design your cross-selling strategies.
- Launch your cross-selling campaigns.

Section 5. Retarget inactive clients

Re-engage inactive customers with retargeting campaigns.

- Make a list of all your inactive customers.
- Reach out with a personalised email to find out why they stopped doing business with you.
- Address their concerns with tailored solutions to entice them to return.
- Offer them enticing incentives.
- Calculate your re-engagement rate.
- Design strategies to improve your re-engagement rate.

Section 6. Enhance customer experience with post-service follow-up

Provide after-service follow-ups to enhance customer satisfaction.

- Design a system that lets you thank customers immediately after sales.
- Create a follow-up system to check-in a few weeks later to find out how everything is going and if customers are happy with the service.
- Design cross-selling campaigns to encourage second sales.
- Get a system in place to ask happy customers for referrals.

Section 7. Incentivise active customers

Achieve quick wins with paid ad campaigns.

- Identify your most active customers.
- Send them notes, cards, or personalised gifts to thank them for their business.

- Give them a discount on their next order and let them know it's only for loyal customers.

Note: Repeat steps two and three periodically, and get them perpetually engaged with your brand.

Section 8. Take advantage of holiday marketing

Plan and design holiday marketing campaigns to ride on the excitement of those celebrations to generate additional revenue.

- Riyadh season (October to March)
- White Friday (Middle East shopping holiday November 22 – 29th)
- Thanksgiving (the fourth Friday in November)
- Black Friday (the Friday after Thanksgiving)
- Small business Saturday in the U.S (the Saturday following the black Friday)
- Cyber Monday (the Monday following the black Friday)
- Giving Tuesday (the Tuesday following the black Friday)
- Small Business Saturday in the UK (first Saturday of December)
- Green Monday (second Monday of December)
- Hanukkah (the 25th day of Kislev in the Hebrew calendar)
- Christmas Eve (December 24th)
- New year eve (December 31st)
- Ramadan eve
- Chinese new year

Section 9. Trigger clients' FOMO

Use FOMO to trigger impulse purchases.

- Share exciting stories of your happy customers on social media.
- Offer a countdown timer to trigger FOMO.
- Try a “First 100 Buyers” offer to drive sales with scarcity and urgencys.
- Show off customer testimonials to let clients see what they're missing.
- Share milestones to communicate your roadmap to clients.
- Use bundled services, like “buy this, and get that” to drive sales.
- Display relevant badges and awards on your website.

Section 10. Implement a customer feedback loop

Create a customer feedback loop for insights on retaining your existing customers

- Identify areas where you can improve your services.
- Gain a better understanding of your customer's needs and wants.
- Build trust and loyalty with your customers.
- improve sales and customer return rates.

Section 11. Follow clients actively on social media

Follow clients actively on social media to build stronger connections.

- Like and comment on their posts regularly.
- Share their posts to your followers regularly.
- Respond to their comments and questions.

Section 12. Have a product

Offer related products to diversify your earnings.

- Identify customers' real pain points.
- Design a product that addresses these problems.
- Find a way to customise the product to your customer's needs.
- Build your store.
- Develop your eCommerce marketing and cross-selling strategies.