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Pre-Webinar Guide: The Heart of Marketing - How to Win Clients and Keep Them

Welcome!

Thank you for registering for the webinar, **The Heart of Marketing: How to Win Clients and Keep Them**. This guide will help you prepare, follow along, and take actionable steps to improve client retention in your business.

What to Expect

In this webinar, we will cover:

- The real cost of losing a client and how it affects your business
- Why marketing alone isn't enough—systems keep clients coming back
- Strategies to create a seamless client experience and increase retention
- How to assess your current client retention efforts

By the end of this session, you'll have actionable steps to enhance your customer journey and build long-term loyalty.

Pre-Webinar Reflection

Take a few minutes to reflect on these questions before we begin:

1. **How do you currently onboard new clients?**
 2. **What's your biggest challenge in keeping clients long-term?**
 3. **Have you ever lost a client due to a lack of communication or follow-up? What happened?**
 4. **What systems (if any) do you have in place to ensure client satisfaction and engagement?**
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Webinar Note-Taking Guide

Use this section to jot down key insights as we go through the webinar.

Key Takeaways:

Ideas for Your Business:

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Action Steps After the Webinar

After the webinar, review your notes and answer these:

1. **What is one immediate change you can make to improve your client retention?**
 2. **What system(s) will you implement within the next 30 days?**
 3. **What support do you need to strengthen your client experience?**
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Next Steps

1. Join the conversation: Share your takeaways in our [Facebook group](#)!
 2. Start the **Post-Webinar Client Retention Checklist**
 3. Enjoyed the webinar? [Click here to leave us a review](#)!
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Post-Webinar Client Retention Checklist

Assess & Improve Client Retention in Your Business

Use this checklist to evaluate and strengthen your client retention strategies. Answer each question honestly to identify areas for improvement.

☒ **Client Experience & Onboarding**

☒ **Communication & Engagement**

☒ **Delivering Value**

☒ **Feedback & Loyalty**

Your Next Steps:

1. **What's the first thing you will improve?**
 2. **Who on your team (or what tool) will help you make these changes?**
 3. **What's your 30-day goal for improving client retention?**
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Want to take this further?

Register to attend our Build Your Client Journey Workshop.

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