



BUSINESS GROWTH SERVICE PACKET

Client Retention

Keep more of the customers you worked hard to earn with intentional onboarding, check-ins, recovery, renewal, reactivation, and relationship follow-up.

This packet is designed to help you understand:

What the engagement can include, the business outcomes it is built to support, how market pricing compares, and what happens next.

Best fit for

- Businesses losing clients after the first purchase or project
- Teams that do not have a formal follow-up, renewal, or reactivation process
- Organizations seeing avoidable cancellations or customer silence
- Leaders who want retention to be owned, measured, and coached

TSSi approach

Strategy should create action. We focus on practical systems, human-led conversations, measurable next steps, and tools your team can continue using after the engagement.



WHAT IS INCLUDED

Client Retention - Scope of Work

Final scope is customized after the strategy call. Depending on the engagement, the packet can include the following components:

- Retention-risk and churn-point review
- Onboarding and expectation-setting process
- Customer check-in cadence and ownership rules
- Complaint, recovery, and escalation workflow
- Renewal, repeat-service, upsell, and cross-sell opportunities
- Dormant-customer and win-back strategy
- Referral and advocacy opportunities
- Retention scripts and human-led follow-up prompts
- Retention KPI scorecard and account-health signals
- 30/60/90-day retention action plan

How we work

TSSi begins with diagnosis before recommendation. We look at the current process, the people responsible for it, the customer or prospect experience, and the measurements that should guide the next move.



INTENDED OUTCOMES

What This Work Is Designed to Improve

No consultant can guarantee a specific revenue result. The goal is to strengthen the systems and behaviors that influence growth, service quality, follow-up, and decision-making.

- Fewer clients slipping away because no one followed up
- More consistent renewal and repeat-business conversations
- Faster service recovery when a relationship is at risk
- Clear ownership of retention activities
- Better visibility into churn, repeat business, referrals, and account health

1. Diagnose	Clarify the goal, current process, performance gap, and available data.
2. Design	Build the practical strategy, scripts, process, tools, and measures needed for the gap.
3. Implement	Apply the plan through coaching, execution support, or a defined action sprint.
4. Measure	Track activity, outcomes, and next actions so decisions are based on evidence.



2026 MARKET COMPARISON

Comparable Investment Ranges

These are market-comparison ranges from publicly posted U.S.consulting, workshop, audit, and outsourced-service pricing. They are **not TSSi price quotes**. TSSi investment is scoped after discovery based on complexity, customization, access to data, implementation level, travel, and duration.

Engagement type	Typical market range	What the range usually reflects
Solo owner / individual	\$300-\$750	Retention diagnostic, advisory, or focused strategy session.
Team up to 15	\$1,500-\$7,500	Workshop or facilitated retention/customer-success working session.
Retention / loyalty project	\$3,000-\$15,000+	Program review, redesign, analytics, roadmap, and implementation support.

Why ranges are wide: a one-time advisory call, a customized team workshop, a multi-week strategy project, and done-for-you execution are different products. The number of stakeholders, channels, locations, deliverables, and level of implementation all affect price.



READY TO BUILD THE RIGHT GROWTH PLAN?

Book a Strategy Call

We will use the call to understand your goals, identify the biggest gap, and determine the right scope before any proposal is created.

BOOK YOUR STRATEGY SESSION

<https://calendly.com/devinannhwhite/strategy-session>



WHAT TO HAVE READY FOR THE CALL

- Your primary business-growth goal for the next 90 days
- Where the process currently feels inconsistent, slow, or unclear
- The team members who own the work today
- Any CRM, sales, marketing, customer, or calling data you can reasonably share
- What you have already tried and what happened