Client Relationship Guide

FROM DOT AND COMPANY

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Client Love

A Guide to Building Lasting Relationships for Agencies and their Clients

This resource provides 5 proven steps for empowering your process and building the foundation of long-lasting relationships.

- **The Daily Pulse**
- **Build a Documented Timeline and Visualizing your Strategy**
- **Implement Happiness Surveys**
- **Put Client Gifting In Your SOP**
- **Build a Knowledge Base and CAM SOP**

The Daily Pulse

Our Secret to Happy Clients

It's time you start every day off on the right foot with your clients by implementing a quick daily pulse check. Sometimes these are in the form of metrics, strategy, or project updates— and other times we simply are checking in on our client's day-to-day with their families, hobbies, or dogs (shocker!). It transformed our client communications, and we think it'll transform yours too.

First, listen to this episode of the Happy Clients Podcast, then use these email templates to get started!

Daily Pulse Examples

Hey team,
Happy Monday! And good news!

As mentioned, we're live with the new Linkedin Ads and we've had our first lead — an [INSERT DETAILS]. Please ensure to touch base with them asap (info below!).

Thanks,
[Client Account Manager]

Hi [CLIENT]!

Just popping into your inbox to let you know that the team's still working through your [ads/scripts/strategy]. I'm keeping a pulse on everything, and I'll update you soon to let you know when you can expect to see these.

Enjoy the rest of your day!
[Client Account Manager]

Hi, [CLIENT]!
I hope you're having a great week so far!

I wanted to let you know that your [ads/scripts/strategy] is under final development with our amazing creative team. I hope to have a firm expectation date over your way tomorrow. Until then, enjoy the rest of your day.

[Client Account Manager]

Hi [name]!

How's your day? I just wanted to let you know our copywriter is finalizing your feedback on our most recent ad, and we should have that ready for final approval in 1 to 2 days.

As we get continual feedback, we'll be able to nail your brand voice even more, so there will be less and less turnaround time on these! We appreciate and value your input on our most recent ads.

[Client Account Manager]

Hi [name]!

I'd love some feedback on our most recent reporting style. Do you need any help with the metrics, and understanding your goals?

I'd be happy to walk you through the details if you need them. I know with the end of [quarter/month], it's an important time to reflect on the data and numbers of our advertising efforts. I'd love to support you in that! Let me know!

[Client Account Manager]

Visualizing Strategy

How to Explain the Metrics in Meaningful Ways

Let's talk strategy, and how to build meaningful relationships with your clients, by becoming a trusted advisor in their biz. Start at the beginning of your client relationship, and overexplain success metrics, overcommunicate timelines, and explain how digital marketing is not the golden ticket to success.

The easiest way to do this is by using our Strategy Outline templates as your client resource for Onboarding and presenting.

Happiness Surveys

The Key to Opening the Door to Growth and Opportunities

Asking for feedback is like gold to your business. Treat it as such by opening the door to feedback, implementing improvements, and beginning endless referrals. By asking for feedback, you'll foster the relationship for more growth. You can also utilize NPS scores!

Check out our Happiness Survey templates!

Client Gifting

We take Gifting Very Seriously!

Systemize your process so you're reminded to be thoughtful. It sounds silly, but having recurring tasks for client-gifting, and options (like a gift guide!) makes it easy.

Get access to our curated list of the ultimate treats! We update this all the time!

CAM SOP

The Opportunity of Documentation

There's so much opportunity to document your processes so you can finetune them. An SOP should be an ever-evolving document that is never truly finished.

Documents like Daily Pulse templates, Strategy Visualization templates, Client Profiles, Gift Guides, Happiness Surveys, and more, should all be developed and processed in your Client Account Management Standard Operating Procedure.

Here is a template CAM SOP to get started! We recommend beginning at the high-level process then building task descriptions and step-by-step guides from there.

There is so much value in building long-lasting client relationships. From making your every day just a little bit easier to client retention in the long term. If you have any questions about the resources provided, or just want to chat CAM life, please don't hesitate to reach out to hello@dotandcompany.co. We're here for you!