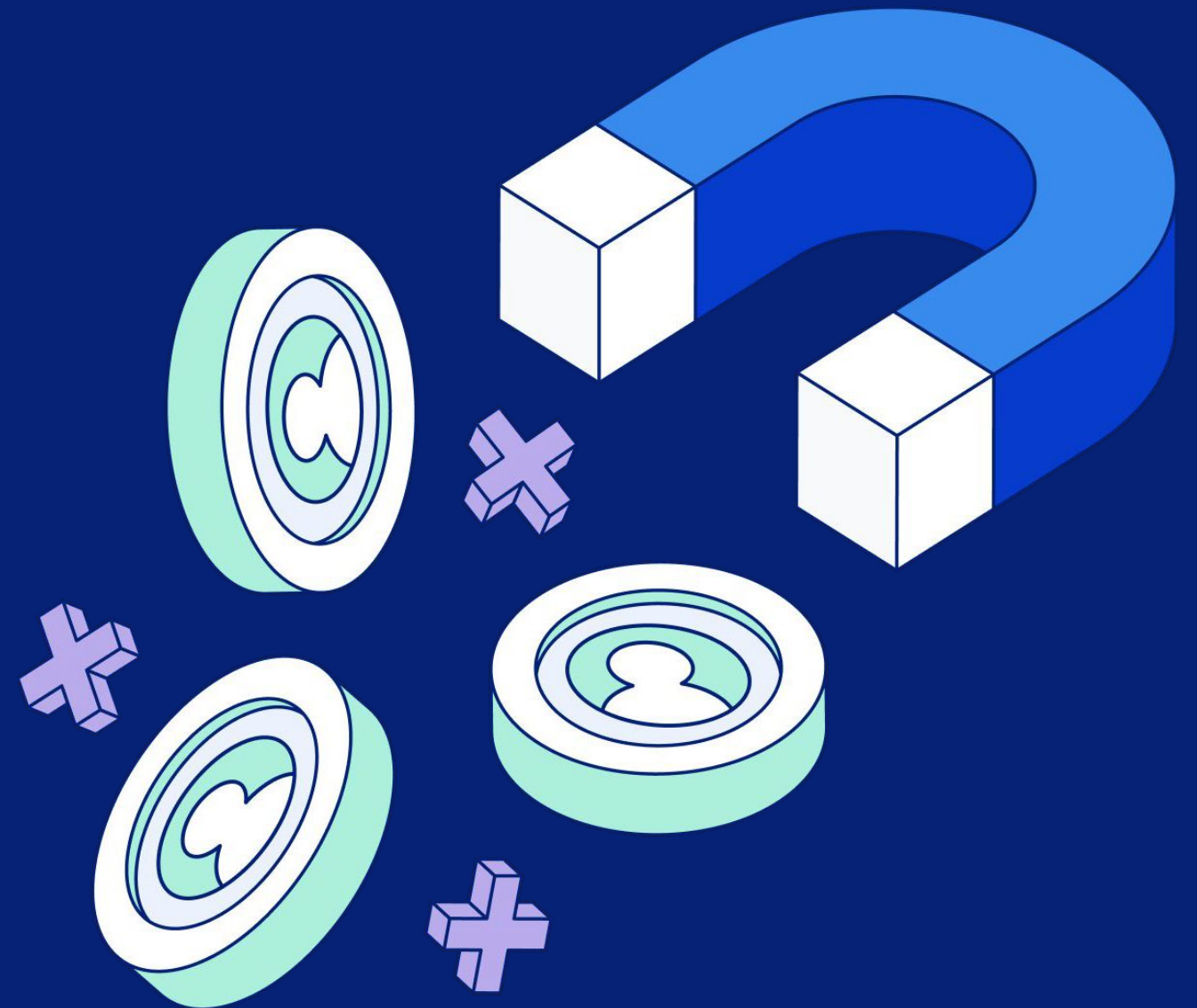**CallRail**

Checklist

Top 7 ways agencies can keep clients coming back

Acquiring a new customer is four times more expensive than retaining an existing one — but with a 40% average agency churn rate, many agencies feel they have no choice but to focus on new client acquisition.

So how can your agency improve retention?

Here are 7 ways to use automation, AI, and other smart strategies, to help your agency retain more clients, faster, easier, and for longer.

1. Make client relationship management a top priority

Strong client relationships are the backbone of repeat business – and a good relationship is built by communicating early, often, and thoroughly. In addition, it's important to set clear expectations about what you'll deliver.

One way to make expectations clear is with a proactive implementation of a Service Level Agreement (SLA), which is a contract between your agency and a client that specifies in detail the services you will provide. According to HubSpot, companies that implement SLAs with their clients see a 36% increase in customer retention and 38% more sales, compared to firms that do not.

"The key is to set realistic customer expectations, and then not to meet them, but to exceed them – preferably in unexpected and helpful ways."
–Richard Branson

2. Implement a comprehensive lead-scoring system with AI

Agencies that use a lead scoring system see a [77% increase in ROI](#) over those that don't. By filtering out bad or unresponsive leads, a scoring system can yield immediate and quantifiable results for your clients.

What's more, with AI advancements, such as [CallRail's Premium Conversation Intelligence®](#), you can now automate the analysis, scoring, and sorting of inbound leads, minimizing the need for human input and maximizing efficiency. This helps your client filter out low-quality leads and focus on those most likely to convert into paying customers. What's more, it also helps with retention by allowing you to prioritize calls from current customers so your customer service remains top-notch.

3. Pull marketing insights for clients from every layer of their marketing tech stack

To deliver more value and insights to clients, agencies should pull data from every layer of the marketing tech stack. Gathering metrics from various tools, CRMs, and databases can be time-consuming, but using integrations can streamline this process.

By leveraging tools like Salesforce, HubSpot, and CallRail, you can automate data collection and create unified dashboards. Even if clients use CRMs without the necessary integrations, solutions like DashThis, which integrates with CallRail, can automate data consolidation and reporting, enabling you to build comprehensive, insightful reports efficiently.

4. Help your clients focus on the marketing metrics that really matter

It's important for agencies to stay laser-focused on clients' core business goals rather than surface-level metrics. For instance, while a white paper download signifies a potential lead, a consultation form submission is far more valuable, indicating a direct interest in the client's services.

Understanding and aligning with strategic objectives, such as increasing appointments at a new location or boosting merchandise sales, enables your agency to tailor your efforts more effectively.

5. Use call insights to make metrics more impactful for clients

Anecdotal proof points can breathe life into otherwise dry data sets, making metrics more relatable and impactful for clients. Tools like CallRail facilitate this process by allowing agencies to quickly sort calls by [AI-detected keywords](#) and provide concise summaries, showcasing the effectiveness of campaigns and sales scripts.

This storytelling approach not only helps clients understand the value of marketing metrics but also strengthens the agency-client relationship by clearly demonstrating the impact of their work.

6. Tie the ROI of your services to your clients' bottom line

Whether it's increasing lead and conversion rates, or creating money-saving efficiencies, make sure your agency delivers a clear financial ROI – and your clients know it.

For instance, digital marketing company Logical Position has proven its ROI to their client Appliance Recovery by using CallRail to provide insights into their marketing strategies, which has been instrumental in their 40x revenue growth.

"Since incorporating CallRail into our operations, our business has undergone a remarkable transformation…achieving annual revenues in excess of $2 million."
–Robert Frumkin, owner of Appliance Recovery.

7. Delight your clients and exceed expectations

To elevate the client experience, strive to go above and beyond in delivering tailored, valuable insights that address your clients' specific needs. By offering transparent marketing insights, you not only enhance your clients' experience with your agency, but also prove your agency's value and increase retention.

Webistry, a healthcare marketing agency saw a remarkable 45% increase in client retention once they included CallRail on every client account and campaign.
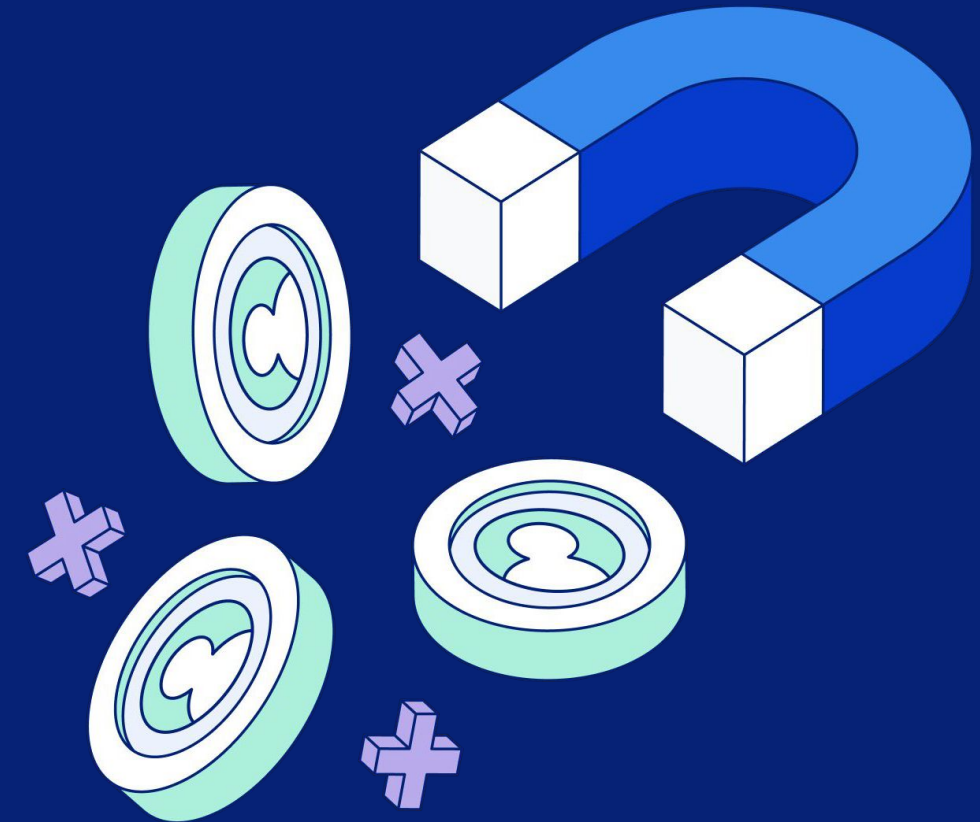
Ready to crush client churn?
Try CallRail and see the difference it can make in your client retention rates.

Try CallRail for free