

# Retention Checklist

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You're a lot more likely to retain the client long-term if you deliver the specific value they're seeking. Creating specific value doesn't happen by accident. The Retention Checklist guides you through the critical areas you need to address to make the solution *buyable* and *valuable*—ensuring future opportunities with the client.

## Assignment

- ☐ Is the client open about their real needs and challenges?
- ☐ Do you have a clear Assignment based on a need or opportunity?
- ☐ Are they eager to see some of your solutions?

## Bright Idea

- ☐ Did the prospect select the preliminary idea they wanted you to develop into a proposal?
- ☐ Is the Bright Idea tailored to the prospect's needs?
- ☐ Will the prospect recognize some of their input in the plan you're proposing?

## Buyable Solution

- ☐ Have you addressed every "No" or hesitation?
- ☐ Did you discuss everything of importance to the prospect (timelines, pricing, evaluation criteria, etc.)?
- ☐ Is the Decision-Maker and all the Decision-Influencers fully invested in the plan and committed to its success?

## Accountability

- ☐ Are post-sale expectations of both buyer and seller clearly defined and understood?
- ☐ Have you and the client agreed upon a workable system to track return on investment?
- ☐ Does the plan include follow-up monitoring, evaluation, and reporting on client satisfaction?

## Implementation

- ☐ Follow the Critical Path you used in the No-Surprise Proposal.
- ☐ Be alert for unanticipated issues and resolve quickly.
- ☐ Conduct an evaluation meeting at the appropriate time or appropriate intervals.