

Your Ideal Long-Term Clients

Allow 20-30 minutes. Use fictional businesses if you have no clients yet.

Your name / service / date:

1. Three clients or businesses with a recurring need:

2. What work do they need repeatedly, and how often?

3. Signs of good fit: communication, payment, scope and value:

Design a Recurring Package

Choose fixed deliverables or reserved hours. Avoid unlimited work.

4. Deliverables or hours, deadlines, revisions and exclusions:

5. Price, estimated time, fees, other costs and payment timing:

6. Response times, extra-work approval and unused hours:

7. Start date, renewal, cancellation notice and paid pilot:

Follow-Up and Relationship Tracking

Use preferred channels; respect a decline or request to stop.

8. Write a relevant, respectful follow-up message:

9. Client, last project, recurring need and follow-up date:

10. Package offered, payment history and contact preferences:

11. How will you limit access and avoid storing sensitive data?

Monthly Review and Next Steps

Track actual time and costs; keep relationships with other clients.

12. Package results: client value, actual hours, costs and profit:

Monthly review checklist

- ☐ Confirm deliverables and client satisfaction.
- ☐ Compare actual time and costs with your estimate.
- ☐ Review scope, deadlines, renewals and unpaid invoices.
- ☐ Agree on extra work before starting it.
- ☐ Update contact preferences and follow-up dates.
- ☐ Review how much income depends on one client.
- ☐ Choose one other client relationship to develop.

One action to complete within the next 7 days:

Next: Lesson 33 - Referrals and Repeat Clients

<https://moneyonlineers.com/growing-through-referrals-and-repeat-clients/>