SMARTer Entrepreneurs

WINNING AND KEEPING CLIENTS

Win the right clients, and keep them.

Coaching and mentoring for owners of consultancies, agencies and specialist advisory businesses, £500K to £10M turnover.



Brilliant at the work. Never taught to win it.

Most businesses that sell expertise win their work through relationships and referrals. It works well, until it doesn't: a key client leaves, a referrer retires, or the business grows beyond the founder's network. Expertise is hard to sell: buyers can't judge it in advance, and the people who have it usually hate selling it.

Signs you may recognise

- A full diary one quarter, an empty one the next.
- New work depends on you, or on one or two relationships.
- Time spent on enquiries that were never going to buy.
- Proposals that "look great", then go quiet.
- Good clients who drift away without saying why.
- Happy clients, but referrals that arrive by luck.

What owners usually want

01 A steady flow of the right enquiries, not just more of them.

02 Winning work that does not all rest on you.

03 Clients who stay, ask for more and recommend you.

04 A way of winning work your team can run too.

You decide which matter most. Everything we do is measured against the goals you set.

Who this is for

Owners and leadership teams of businesses that sell expertise, usually with ten to fifty people. The business is basically sound and the work is good. You would rather not be the only one winning it, and you are willing to build a better way, steadily.

Not the right fit if

You need new clients in the next few weeks just to keep going. Nor is this a lead generation service, or for anyone looking for someone to do the selling for them.

THE EIGHT CAPABILITIES

Winning and keeping clients is eight connected capabilities, not one skill.

They run from choosing who you want to work with to making it easy for happy clients to recommend you. Each one can be learned, practised and built into how the business runs.



Targeting MARKETING

Choosing who you actually want as clients.

Fewer, better-fitting prospects, chosen on purpose.



Visibility MARKETING

Being known before they need you.

The right people know your name when the need arrives.



Qualification SALES

Spotting which enquiries are real.

Your time goes on work you can win and want.



Nurturing SALES AND CLIENTS

Staying in view until they are ready.

Useful contact through long decisions, without chasing.



Conversion SALES

Turning the right prospects into clients.

Expert conversations and well-scoped proposals, not pitches.



Retention CLIENTS

Keeping the clients you win.

A regular rhythm that spots risk early, beyond year one.



Expansion CLIENTS

Doing more for the clients you have.

Helping with more of what they already trust you with.



Referrals CLIENTS

Making it easy for happy clients to send you work.

Specific asks at the right moments, so referrals stop being luck.

The eight capabilities compound when they work together, and leak when they don't.

Visibility without qualification fills the diary with the wrong conversations. Conversion without retention means winning the same revenue twice. That is why Targeting comes first, and why keeping clients comes before growing them.

How it works

01

Find the weakest link

The free Revenue System Self-Assessment scores all eight capabilities in about fifteen minutes. It covers winning and keeping clients, not the whole business.

02

Work on what matters most

We agree goals, then build one or two capabilities at a time: coaching, proven practice and my experience, with you making the decisions.

03

Make it stay

Simple routines your team can run, so the way you win and keep clients no longer depends on you alone.

The engagement is designed to end. The capability is designed to stay.

Winning and keeping clients is part of the SMARTer System, which looks at the whole business through ten key areas. If the real gap is elsewhere, in pricing, people or delivery, we can work on that instead. Guide prices are published at smarterentrepreneurs.co.uk.



Simon Hale

Founder, SMARTer Entrepreneurs

Thirty years in frontline commercial roles, including Oracle, Infor and Lawson, and three businesses built from scratch. I have sat where you sit: winning the work, delivering it and running the business at the same time.

- ILM Level 5 qualified in coaching and mentoring
- Member of the Association of Business Mentors
- Approved mentor on Help to Grow: Management
- Working towards EMCC accreditation at Practitioner level

My promise. I won't promise revenue or results, because nobody honest can. I don't do the selling for you. What I will do is help you see clearly, decide well and build a way of winning work that lasts.

Ready when you are

STEP ONE

Book a Discovery Call

Up to an hour on Zoom. No pitch, no pressure, and you'll leave with something useful either way.

OR START HERE

Take the self-assessment

Fifteen minutes, free, online. Find your weakest capability, and where to start.

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