



HubSpot

5 Templates to Help You Win, Retain, and Delight Your Clients

From getting new business to sharing your wins with clients, these templates will help your agency ace every stage of your client relationship.

“The best part of my job is searching for business templates on Google.”

- Said no-one ever!

We know that you’d rather spend your time creating awesome campaigns for your clients, or using innovative technology to take your marketing and sales to the next level, than crafting quarterly business reviews.

But, as business people, we also know that a well-crafted quarterly business review is a must to keep clients happy and secure a future relationship. The same goes for the proposal, onboarding, and all the touchpoints during the client lifecycle.

That’s why **we tapped into the collective wisdom of thousands of HubSpot Agency Partners** to create five templates to help you win, retain, and delight your clients.

Starting with a solid proposal and ending with a quarterly business review, use these five templates to **gain new business, set goals, agree on priorities, define deliverables, manage expectations, remove scope creep, and communicate your results.**





1. Business Proposal

The proposal is a key part of your agency's sales process. It takes into account all previous conversations you had with the potential client and demonstrates that you understand their business' pain points and that you have a solution to help them reach their goals. In the proposal, you'll describe the specific services that your agency will deliver as well as your pricing. Also, the proposal highlights why your agency is uniquely qualified to provide these services, that's why it includes an overview of your agency's team and previous clients.

Check out [this ebook](#) if you would like to dig deeper into how to use this proposal template as a strategic document to seal the deal.

2. Statement of Work (SOW)

You have agreed on the *"What"*, now here comes the *"How"*.

A Statement of Work (SOW) succinctly lays out a breakdown of your agency services: deliverables, timelines, pricing, and expected results.

SOW's are used to not only define exactly what should be done on a project but as a first step to also protect you from the dreaded scope creep. Keep in mind that during the quarterly business review you will go over the deliverables stated in the SOW.

3. Client Onboarding



You've signed up a new client. It's day one of your working relationship together. What do you do? What comes first? What do you want to accomplish in your first few meetings to make sure you hit the ground running?

If you don't have an organized process for onboarding, you can struggle to gain the confidence of your client and ultimately lose the momentum established during the excitement of the pitch and proposal process.

Set the right tone for your relationship with proper onboarding. This template will help your agency and client align priorities, and unlock the client-resources you need.

4. Prevent Scope Creep



Scope creep is like kryptonite for a client-agency relationship. From your client's perspective, asking you to make minor website or content edits here and there shouldn't be a big deal. But as an experienced agency professional, you know that adding little, but not accounted for, changes can turn your sharp goals into a fuzzy mess.

Picture this all-too-common scenario: You're 12 revisions into a client project when you promised only four. You've now spent almost triple the time you intended on the project, which gives you less time (and energy) to devote to other clients.

This template allows you to list every action item, its priority, and the resources it will need. You can compare this list with the agreed services in the SOW to help your client visualize how any new requests will affect previously agreed action items. If the agreed services need to be modified or extended, which is a common occurrence, this template will be of great help.

5. Quarterly Business Review

A Quarterly Business Review (QBR) is, as the name suggests, a meeting with your client on a quarterly basis where you discuss their business, what you've done to support them and how you plan to continue supporting them going forward. Quarterly business reviews are a great way to show your client the impact you have had on their business, while also communicating any roadblocks that you've met in the past quarter. This review can be an opportunity to get buy-in for further support from your client's executive team, as well as celebrate any wins your team has delivered for your client.

Nothing makes you -- and your client -- happier than a chart that shows just how great a campaign is performing or the return on investment your client is getting. But collecting all that data each month, organizing it, creating charts, and writing up reports is draining your team's time.

Save time and show your client the impact that your agency had on their business; share your wins, analyze the losses, remove roadblocks, and plan for the future with this template.



Interested in growing your agency with HubSpot?

As a HubSpot agency partner you have access to a community of rated peer agencies to learn and grow with, can connect to an ecosystem of more than 60,000 customers globally AND activate 300+ integrations on a customizable and trusted platform. You have the opportunity to become an extensible partner to your clients to help them and your agency grow better.

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