



KEEPING CLIENTS
CLIENT RETENTION SERVICE

KEEPING CLIENTS SERVICES

Keeping Clients Services

Contact Tracey Dean 0411 546 947 tracey@keepingclients.com.au

After managing a national award-winning brokerage for fourteen years, Tracey started 'Keeping Clients' almost seven years ago. Keeping Clients helps brokers from many different aggregators, all over Australia with talking to and listening to their clients. These conversations help clients to feel valued and respected and so more likely to be loyal to the broker. As well as the retention benefits, a considerable amount of repeat business is usually generated during the calls.

- Anniversary calls to clients on behalf of the broker – we call as if we are working for your business.
- 5 – 8 week Post Settlement Calls
- Net Promoter Score Calls
- Brokers who have bought an existing database/ trail
 - Call to follow up on an introductory email or letter – make sure that the client knows who you are and that you are there to look after them.
- Specific Campaign calls
 - Calls to clients 1 – 2 weeks after an email or letter has been sent – check if they received it, let the client know the reason and as always, check how their current finance is going.
- Cool Lead follow up calls
 - Re-calls to leads that were not ready to proceed earlier, or who did not respond to follow up emails
- Other idea's brokers may have!!!
 - We are happy to help wherever possible!
 - Staff at Keeping Clients have high EQ – so great at talking to and listening to clients.
 - Our staff are all mature and have backgrounds in finance so we can have informed, intelligent conversations with your clients, but any questions are directed back to the broker as we are simple intermediaries.
 - Keeping Clients do not make cold calls, but we love warm client calls!

Calls for other industry groups – Keeping Clients also makes calls for other industry groups for long- and short-term campaigns. Groups include lawyers, accountants, financial planners, not for profit organisations and a diverse variety of small businesses.