CLIENT VALUE UNLOCK

A SHORT GUIDE FOR AGENCY LEADERS WHO WANT TO RETAIN & GROW THE CLIENTS THEY ALREADY HAVE

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BEFORE YOU READ 👀

This guide has been created for agency leaders who know their Client Services function is capable of more - but can't get the time, structure or headspace to unlock it fully.

Client Services isn't a support function. It's a growth engine, and a melting point of organic opportunities for your agency to accelerate. And this guide helps unpick what it takes to fuel it properly.

If you've been thinking about the steps you need to take to move your CS team into a place of 'strategic business consultants' or 'growth partners' for clients....then you're in the right place. ⚡

FROM SERVICE TO STRATEGY

THE 'SHIFT' THAT CHANGES EVERYTHING

Let's be honest - most CS teams were built to do one thing well: deliver. That meant manage the relationship, handle the brief, keep the client happy. And actually....the research points to the fact they still do! But somewhere along the way, **the expectation of what CS *should* be doing for the agency commercially has shifted - and the structure, confidence and frameworks haven't kept pace.**

Agencies pulling ahead aren't doing it purely through new business. They're doing it by unlocking the growth that's already inside their existing client relationships. And the CS team is best placed to make that happen - because they're already in the room ready to have these conversations and already trusted. They have an incredibly important seat at the table, (and within the client's business).

The shift isn't about turning CS into a sales function. It's about giving CS the direction, systems and commercial understanding to do what they're uniquely positioned to do:
grow the clients they already have.

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TURNING RELATIONSHIPS INTO REVENUE

IT'S CLOSER THAN YOU THINK

This is one of my most consistent observations across agency CS teams: **the (untapped) opportunities are already there.**
They're in the briefs that get delivered without a follow-up question. They're in the 'lunch with client' when something gets mentioned in passing that never got picked up. **The problem may not be that CS teams aren't spotting them. It might be that they're unsure about what move to make once they do.**

Without a clear framework for what to do next, the opportunity stays in that one conversation and goes nowhere. It doesn't make it into the pipeline. Or if it does, **it sits there...static, undefined, and unconverted.** Meanwhile the new business team is being asked to carry the full weight of growth. That's a harder, more expensive way to grow, and a more fragile one too.

The most commercially resilient agencies grow from both directions: winning new clients and systematically growing the ones they already have. So now we know these opportunities exist, the question becomes whether your CS team are ready to qualify & convert them? Cue...**Structure, training and confidence.**

4 STEPS TO STRUCTURED CONVERSATIONS AND CLIENT GROWTH

01. LISTENING
02. QUALIFYING
03. SHAPING
04. TIMING

The next few pages get to the practical heart of the guide 👉🏼

As we've already unlocked, the difference between a CS team that spots opportunities and one that consistently converts them is structure. Specifically, there are four steps that, when embedded into how CS operates day to day, turn client conversations into agency growth.

Let's unpack them one at a time and see how adding 'structure' doesn't mean putting the brakes on - it means taking them off.

01. LISTENING

<u>This doesn't mean passive listening.</u> **I'm talking about 'Commercially-aware' listening that picks up on signals pointing to a need, a gap, or an ambition that hasn't been addressed yet.**

SIGNALS TO LISTEN FOR

- *'We're thinking about doing X next year" [a direction signal]*
- *'We've been struggling with Y internally', [a painpoint signal]*
- *'Our board wants us to focus more on Z', [a priority shift]*
- *'We tried this elsewhere but it didn't work', [a 'lack of clarity' signal]*
- *'I'm not sure who handles that for us', [an ownership signal]*

THE ACTION TO TAKE

- Ask yourself after every client call:
  'Did anything come up that we're not currently helping with?'
- Log it before you move away from your laptop or into your next meeting - in your account plan, your next senior sponsor meeting, your weekly stand up, your oneNote...wherever you track client growth actions.
- If it's not written down, it's gone.
- Keep it simple. Create a consistent habit. Nothing elaborate.

My favourite signal

This one is an increadible springboard!

- It tells you what they've already tried, so you're not walking in with the same solution that's already failed.
- It signals they're open to trying again - they haven't given up, they're just cautious. It's actually a warm door, not a closed one.
- And it **reveals where the real problem might be** - was it the wrong solution, the wrong partner, poor execution, lack of buy-in internally? The answer tells you a lot about what they actually need.

02 QUALIFYING

Not every signal is an opportunity. And that's ok! Once you've taken note of the signal and you're mindful of why the client gave you it, now you're on to the qualifying part. Three simple questions that you can ask internally before deciding whether to pursue:

INTERNAL QUESTIONS TO ASK

1. Can we genuinely (and credibly) help with this?
2. Is there appetite or budget (likely or pre-determined) to act?
3. Is now the right moment, or does this need more groundwork?

THE ACTION TO TAKE

Create a one-line entry in your pipeline tool for every qualified opportunity:

Client name> signal heard> potential service > next action.

Do it the same day you ask the qualifying questions. And if it doesn't qualify - don't keep it as an opportunity to nurture. Focus on what you've actually qualified.

This one 👀

Saying yes to everything is one of the most damaging things an agency can do to a client relationship.

Why?

- Because credibility is everything in a relationship. If you overcommit and underdeliver, you don't just lose the work - you lose the trust.
- Clients see through it, (really).
- The right answer is sometimes saying "that's not our strongest area, but here's who could help". It signals confidence, honesty, and long-term thinking over short-term revenue.

03. SHAPING

So you've qualified the opportunity internally (congrats!). Now shaping or replaying what we heard the client say is gold dust. Done well, it means making recommendations that are insightful, relevant and (positively) unexpected. You don't need to overthink it, but these four components should do the trick (could be a simple one pager, or short email).

REPLAYING YOUR OBSERVATIONS AROUND THE OPPORTUNITY (CLIENT FACING)

1. **What we noticed** - the signal or observation from the conversation. What was said/ implied/ what we picked up on.
2. **What we *think* it means for you** - why it's relevant now and why we're surfacing it as something to build our next conversation around.
3. **What we'd propose** - be specific, not vague
4. **What it would achieve** - the desired outcome for the client, (aka the reinforcement to the client that it's something important to explore)

THE ACTION TO TAKE

Use these four points and create yourself a branded 'shaping the brief' template. It'll take you 5 minutes and it'll demonstrate you've been listening, learning and building recomendations in the background.

If you can't fill in all four clearly, it isn't ready. You likely haven't understood the clients driver, or potential for developing this as an opportunity. Set up another call...ask some deeper questions.

04. WHEN & WHO

You've shaped a brilliant recommendation. Now the question is: when do you land it, and who needs to be in the room when you do?

WHEN - TIMING CONSIDERATIONS

- **Budget cycles** - new financial year conversations beat Q3 pressure moments
- **Relationship moment -** after strong delivery is right; after a difficult patch is not. If it's the latter, not all is lost, but clear resolve must be done on the delivery front first.
- **Have you 'earned' the right** - is there enough trust for this to land as helpful, not presumptuous

WHO - AUDIENCE CONSIDERATIONS

- The person who gave you the signal may not be the person who needs to say yes - map the stakeholders.
- Identify your internal champion (client-side) - who inside the client business do you think wants this to happen and can help you navigate it?
- Consider who could block it, and whether they need to be brought along before you build this out further.

Tip! Don't be afraid to ask the client who else needs to be involved. You're about to share something that answers their challenges directly - they'll want it to land in the right place too.

NUMBERS MATTER

WHAT COMMERCIAL UNDERSTANDING ACTUALLY MEANS FOR CS

Underpinning all four steps is something many CS teams have never been explicitly given: **commercial understanding. Not sales training.** Not targets. Knowing how the agency makes money, and how their decisions affect it.

That means understanding margin at a client level. Knowing what a healthy account looks like versus one quietly winding down. Understanding how scope creep adds up. Being able to have an honest conversation with your client about value rather than absorbing requests to avoid friction.

When CS teams understand the commercial reality of the agency, they make better decisions, have more confident conversations, and spot the moments where the agency is leaving value on the table.

WHAT A COMMERCIALLY-FIT CS TEAM LOOKS LIKE

When the framework, commercial understanding, structure and confidence come together, the CS team looks different.

- It has real-time visibility of margin and scope.
- A consistent approach to identifying and developing growth opportunities.
- People who understand how the agency makes money.

And it isn't over-reliant on new business - because existing accounts are growing too.
Most agencies have the talent. What's missing is the structure, the framework and the confidence to make it the norm.

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ENJOYED THE CS VALUE UNLOCK GUIDE?

Let's talk. I'd love to chat more about all things Clients & Growth. Ella ROSIE'S '90 minute Client Unlock' session may be your best next step.

Ella Rosie's works alongside agency leaders at crucial moments of growth or transition. Real CS experience, embedded in your team, focused on what will actually work for your agency and your clients. Right for your agency, not off-the-shelf.

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