

# RECN Client Retention Blueprint

A comprehensive guide to fostering lifelong client loyalty through RECN's concierge-driven strategies.

## 1. Client Value Mapping

- Identify high-value clients by transaction history and referral potential
- Segment clients by lifecycle stage (new, mid-term, long-term)
- Define personalized engagement plans for each segment

## 2. Automated Engagement

- Set up scheduled touchpoints: birthday emails, home anniversary cards, market updates
- Create templated newsletters featuring home maintenance tips and local events
- Implement drip campaigns for ongoing value delivery

## 3. Concierge Value-Adds

- Offer vendor coordination for home improvements and repairs
- Provide exclusive partner discounts on home services and financing
- Host client appreciation events: virtual workshops, community meetups

## 4. Feedback & Surveys

- Deploy Net Promoter Score (NPS) surveys post-close and annually
- Collect qualitative feedback through concierge-initiated interviews
- Use insights to enhance service offerings and address gaps

## 5. Referral Program Activation

- Define tiered incentive structures (service credits, gift cards)
- Automate referral requests after successful concierge services
- Recognize top referrers in newsletters and at events

## 6. Reporting & Metrics

- Track retention metrics: repeat transaction rate, referral revenue, NPS
- Generate quarterly reports for continuous improvement
- Share results with team and adjust strategies accordingly

## 7. Implementation Workflow

- Concierge initiates onboarding of retention program via CRM integration
- Schedule training for agents on using retention tools and dashboards
- Roll out phased program, starting with highest-value client segment

*Download this blueprint and partner with RECN's concierge to turn clients into lifelong advocates.*