



## *Find Your First Retainer Lead*

A Worksheet from Ryan Castillo

You've realized that client work isn't consistent and retainers are a reasonable path forward in creating stable income.

The problem is

### *How do you find your first retainer?*

Don't fret. This worksheet is designed to guide you through the process.

Print it out and write down your answers as you work through the steps.

## Step 1 - List Your Best Past Clients

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It's going to be easier to sell a retainer to past Clients than new ones. Leave the ones who you didn't have a great working relationship with off this list.

## Step 2 - List the Point of Contacts

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What is their current contact information and their preferred method of contact (e.g. email, Google Hangouts, Skype, etc).

## Step 3 - Catch Up and Gather Information

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Treat this like a courtesy call and find out your former client is doing. The things to cover are

- What's changed since you parted ways?
- Has business been good?
- What are things they are struggling with?
- Are they actively looking for help? Is it for a full time employee? If it's for a freelancer what is their budget?

## Step 4 - Filter for Your Best Leads

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Remember, for a Retainer you want to be on the job indefinitely, provide consistent value, and be irreplaceable. In other words, only keep the leads that

1. Have and continue to make enough money to keep you on retainer.
2. You can offer a solid plan for how you can add value to their business over an indefinite period of time.

Congrats! You have your list of retainer leads and ideas on how you can help improve their business. Reach out to them and close the sale!