LoftyBiz Four-Part Account Review Page

A thirty-minute review for ongoing clients. The suggestion comes last, and only one.

Example figures. General education, not financial or legal advice. Results vary. These are examples, not promises.

How to use this page

Book thirty minutes with each ongoing client's named contact, every three months, well in advance. At the end of the review, put the next date in the calendar so it is already agreed. If the client has complaints, leave the suggestion for next time. This is a working page, not a sales script.

1. The four-part review

Part	What to cover	Your notes
1. What we did this quarter	The work you actually delivered in the last three months. Be specific.	
2. Any issues, and how we fixed them	Missed work, complaints, or delays — and what you changed. Leave this empty only if nothing came up.	
3. What's changing in their business	New staff, a move, a busy season, a new room or site — anything that might change the work.	
4. One suggestion	One idea only, and only after the first three parts. If they still have complaints, wait until next time.	

2. Five retention habits to keep beside the review

Habit	Why it matters
The same team lead for each client	People in the building know who is coming.
A named contact at your company	A reply promised within one working day.
A shared fix-it log	Clients can note anything missed and see when it was handled.
The quarterly review itself	Booked in advance, with the next date set at the end.
Early renewal conversations	Sixty days before a contract ends, not the week before, plus a short thank-you on the a

3. For project firms: a five-step loop after every job

If most of your work is one-off (a contractor, a designer, a renovation), use this loop instead of, or alongside, the review. Do not raise the next job on handover day, with prices.

Step	When	What you do
1. Handover	Last day of the job	Walk the client through what was done, using a one-page sheet: what was installed, how to
2. The note	Before you leave	Write down one or two things you noticed that might matter later. Not a sales pitch — just a
3. Thirty-day call	One month later	Call personally. Is everything working? Any questions? If they mention a future plan, write it
4. Seasonal reminder	Twice a year	A short, useful message for the season, and a gentle invitation to book a visit.
5. Next-job conversation	When the note is relevant, and not before	Raised at the right moment, not on the day they paid a large bill.

4. Exercise: map your last ten jobs

List your last ten finished jobs, or your ten biggest ongoing clients. For each one, write one thing they might need next, and the date you will next be in touch. If you have ongoing clients, book a thirty-minute review with the biggest one before the month is out.

#	Client	What I noticed they might need next	Next contact date
1			

2			
3			
4			
5			
6			
7			
8			
9			
10			

Worked examples from the video (examples only, not promises). Tobias, an electrical contractor in Bozeman, used the five-step loop. His average job was about $3,200. After a year, roughly one client in four came back, up from about one in eight. Akosua, who runs a commercial cleaning company in Cheyenne, held quarterly reviews for fourteen recurring office clients on monthly contracts of about $900 to $4,000. Over the year, five clients added a service, adding up to around $1,400 a month.

Keep each client, their last job, your notes and the next follow-up date in one list. Systex is our own product: loftybiz.net