

Column: Local Search



Keys To Working With New Search Clients: Planning, Communication & Setting Expectations

Jul 29, 2013 at 9:40am ET by [Myles Anderson](#)

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I recently conducted a [series of interviews](#) with four successful and respected local search experts. The interviews focused on the all-important client-agency relationship and examined four key stages, from winning new customers to retention of long-term clients.



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The objective of the interviews was to understand how each consultant/agency approaches the different relationship stages and to understand what makes them successful. Interviewees were as follows:

- Laura Betterley – [YadaYada Marketing](#)
- Brian Childers – [Foxyr](#)
- Darryl Quinlan – [Glacial MultiMedia](#)
- Gary Donson – [Destiny Tech](#)

One of the topics we discussed was starting a new engagement, which delved into the importance of planning, communication and setting the right expectations.

The faster you can build a strong, trusting relationship and establish clear rules of engagement, the smoother and more productive work will become down the line! Here are some tips to starting off on the right foot with your clients.

Don't Shortcut The Planning Phase

The four consultants interviewed agreed on many issues, but in particular they all stressed the importance of the Research & Planning phase in delivering successful SEO work for their clients.

It's critical to understand the state of each client's current optimization (traditional & local), their competitive landscape, and where the opportunities exist for them to gain traction and traffic.

Search optimization is a journey a business goes on, and all successful journeys need a start point, an end point, and a clear map to follow from A to B. Planning gives you the above three things.

"Research and planning are essential when beginning SEO work. It is crucial to understand where my clients currently stand before starting." - Darryl Quinlan

"In my opinion planning is the most important part of doing Local SEO. This is where we figure out locally how much traffic is available, what keywords are going to be the smartest

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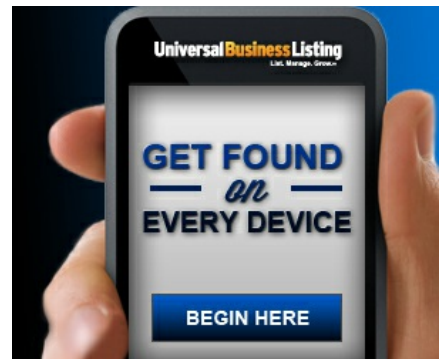
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to go for and if there is a possibility of winning on that key phrase.” - Laura Betterley

Coincidentally, I wrote a specific post on [creating your local SEO roadmap](#) on SEL back in January 2013.

Be Practical: Plan Effectively For Your Clients & Yourself

While you can't shortcut the planning phase, it's certainly possible to tailor the depth of research based on the practicalities of your business & your client's business.

You need to run your agency in an efficient way and carefully manage the time spent on each client. Resources & time are finite, and building a successful agency depends on efficient management of your time & people.

“Some clients require far more attention and work than others and clients need to have a realistic expectation of the amount of time involved. I can spend anywhere from an hour to several hours in the research and planning depending on what exactly the client is expecting for results and what their expected timeline is.” – Darryl Quinlan

As a consultant or agency boss, you need to know how much time to dedicate to each client and focus on the essentials. The more a client pays you, the more time/resources you can spend on them. You need to be practical & ruthless with your time. You have a business to run!

“We are very careful with time tracking on every project, and review every two weeks so we can adjust efforts up and down when needed. We start out each project with a targeted number of hours per month.” - Gary Donson

Involve Clients In The Planning Process

A quick way to build engagement & trust with a new client is to involve them in the planning phase.

First things first: you need to understand their business. To do this you need the client to tell you the who, what, why & how of their business. You need to build up a clear picture with some hard facts & critical data, and the client is always (nearly always!) best placed to give you this data.

But this isn't a one way street. Some clients might get frustrated at all the questions you ask them, but you can turn this situation to your advantage. Make this process about them, not you. This is a chance for them to influence the work you do and to increase their knowledge about search marketing which will help you both down the line.

If you take the time to explain the significance of this data and how it informs the actions you'll take, clients can learn how you work, why you're taking certain actions and what to expect from you. This will save you a ton of time answering questions later on and clients are more likely to trust you & leave you alone to get the job done!

“I find that education is a key component in my relationships with my clients. By better understanding the process and having full disclosure in the work being done on their behalf, clients tend to be far more receptive and understanding.” – Darryl Quinlan

Establish Rules For Communication: Talk Regularly, Meet Rarely

Good communication is essential in any Client:Agency relationship, but it's particularly critical at the start of a new engagement.

Nothing beats a face-to-face meeting for establishing understanding and building trust, but meetings also suck up valuable time which impacts your ability to do the job you're being paid to do.

You also need to establish some rules about communication and make these clear to your clients from the outset. They hired you to improve their online marketing, attract new customers and grow their business. And this means that you won't always have time to talk because you're focusing on the work!

“Part of managing expectations is to let clients know that we do not waste too much time on meetings other than the once a month recap meeting where we go over results and what our plans for the next month are.... I manage expectations prior to the engagement and keep most interactions to email when possible. Our pricing is based on our ability to get the work done. If they need coaching and too much hand holding, it's not profitable.” – Laura Betterley

“Once we both have a clear understanding of what needs to be done and what work will be required, I provide monthly reporting to each client. After that it is dependent on the client's needs for communication. Many clients merely want to know work is being done, but do not need detailed information beyond reporting.” – Darryl Quinlan

But, client calls can't be avoided, and most clients expect an update at least once a month. To stay effective, you need to establish a regular date, time and format for these updates, and make sure clients know exactly what to expect from you. This gives them comfort that they're going to get the information they need and they can leave you alone to do the work.

Where possible, make these update sessions calls rather than face-to-face meetings; if you need some “face time,” then use services such as Google Hangout, GoToMeeting or JoinMe.

“The first month we will meet 1-2 times and then monthly thereafter – half of our meetings



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are done face to face and the other half using Join.Me.” – Gary Donson

Manage Expectations & Set Time Frames

Show me a client who wants great results from day one, and I'll show you 100 more! There is a preconception among many businesses that search marketing is a quick & easy route to clicks, customers and success. This creates unrealistic expectations and leads to awkward conversations between agency and client.

As a consultant, your job is to carefully set client expectations while not scaring them away. It's a pitfall many new consultants fall into — nod your head, say nothing, and just hope the client forgets or that you can deal with it later. You can't! You must deal with it up front and set some targets & timelines.

“Often the clients have unrealistic expectations for ranking. They feel that throwing at bit of money at the issue will immediately shoot them up the ranks. That is just not the case. You need both a short term and long term strategy. Personally I find long term strategies the easiest to plan for and the most beneficial, however explaining to a client that ranking well in a highly contested area will take some time, effort and patience, is not always the easiest conversation to have.” – Darryl Quinlan

The more experienced you are, the easier it becomes to set accurate targets and time frames. You don't want to over-promise, but you do need to dangle the carrot of success to keep clients interested.

“We let clients know that it will take at least 3-6 months for certain results so they know they have to be with us for a bit to see the best results.” - Laura Betterley

“Our intention is to have a client for 12-18 months — when we attempt to set expectations with the client, we always talk to them using a minimum 12-month time frame, even though we do not require a contract.” – Gary Donson

If you want to read the full set of interviews with Gary, Brian, Laura and Darryl you can do so on BrightLocal.com

Opinions expressed in the article are those of the guest author and not necessarily Search Engine Land.

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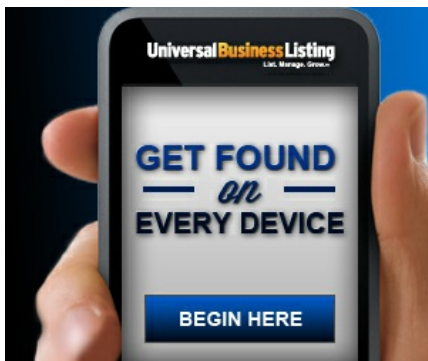
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Cr ³ Research	Hd ³ Description	Ad ³ Duplicates	Lt ³ Text	Th ³ History	Ss ³ Shares	Pl ³ Locality
Cw ³ Words	Hh ³ Headers	As ³ Speed	Ln ³ Numbers	Ti ³ Identity		Ph ³ History
Ce ³ Engage	Hs ³ Structure	Au ³ URLs	Vp ³ Paid	Vd ³ Privacy		Ps ³ Social
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^ | ▾ Reply Share >



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Daniel Campbell

Hi Myles, Couldn't be said any better!

^ | ▾ Reply Share >



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George Banis

Thanks for the post, Myles! It's always nice to see what other firms in the industry do

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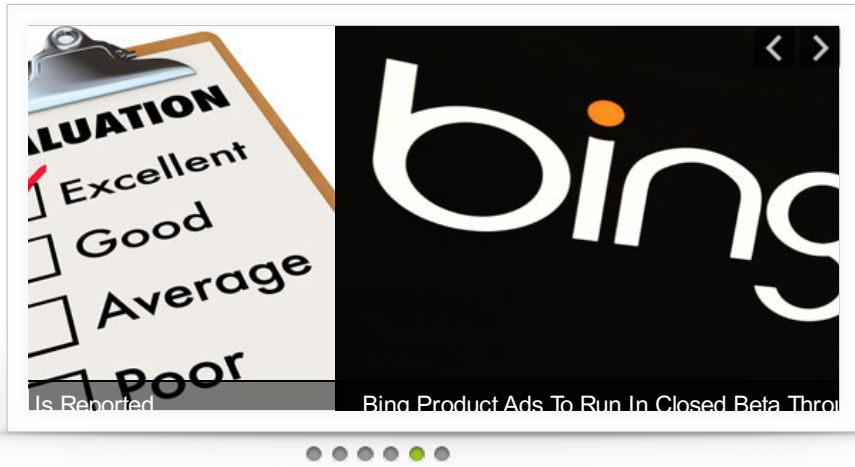
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