THE RETAINER CONVERSION SYSTEM

Scripts · Pricing Templates · Objection Handlers

A complete field kit for solo business owners ready to trade feast-or-famine project work for stable monthly income.

From Projects to Predictability

Most solo owners already have the clients who could become retainer clients. The gap isn't the relationship — it's knowing exactly what to say, how to price it, and what to do when they push back.

This kit gives you three things:

01 **SCRIPTS** Word-for-word email and conversation starters to open the retainer conversation naturally.

02 **PRICING TEMPLATES** A clear framework to package your work into tiers a client can say yes to.

03 **OBJECTION HANDLERS** Prepared responses for the four objections that kill most retainer conversations.

The goal: within 30 days of reading this, have at least one paying retainer client — or have had the conversation. Use the scripts verbatim at first. Adapt once you see what lands.

SECTION ONE

Conversion Scripts

Use these after completing a project, during a check-in call, or when a client asks for more work. Each script is designed to feel like a natural next step, not a sales pitch.

SCRIPT 1 · THE POST-PROJECT EMAIL

Send within 3 days of project completion. Works best when results are fresh.

> Subject: Quick thought on what's next Hi [Name], Really glad we got [project deliverable] across the line — [brief specific result or moment you're proud of]. I've been thinking: a lot of what we did together is the kind of thing that works best with ongoing attention rather than a one-off push. Things like [1-2 specific tasks relevant to them]. I work with a few clients on a monthly basis for exactly this — I keep things moving so you don't have to think about it. Would it be worth a 20-minute call to see if something like that makes sense for you? Either way, it was great working together. [Your name]

Why it works: It leads with a result (not a pitch), frames the retainer as a natural continuation, and makes the ask feel low-stakes (20-minute call, not "let me send you a proposal").

SCRIPT 2 · THE CHECK-IN CALL PIVOT

For use mid-conversation when a client mentions ongoing pain points or future plans.

> "That's actually something I help a few of my clients with on an ongoing basis. Instead of coming back to me project by project, they have a set amount of my time each month — so when something like [their pain point] comes up, it's already handled. Would it be useful if I put together a rough idea of what that could look like for you? I can have something to you by [day]."

Why it works: You're responding to *their* stated problem, not introducing a new concept. The phrase "already handled" does a lot of work — it sells the feeling of relief, not a service.

SCRIPT 3 · THE INBOUND INQUIRY REDIRECT

When a past or new client reaches out asking for project work you've done before.

> "Thanks for reaching out — happy to help with [their request]. Before I put together a project quote, I want to mention: I have a monthly arrangement some clients use that might actually be a better fit. For a flat monthly fee, you get [X hours / defined scope] and we handle things like [their request] plus anything else that comes up in that area. It tends to work out better for clients who need this kind of work more than once or twice a year. Want me to send over a quick comparison so you can see which makes more sense?"

Why it works: You're not replacing their request — you're upgrading it. Offering a "quick comparison" removes pressure and positions you as the advisor, not the vendor.

SCRIPT 4 · THE ANNUAL REVIEW OPENER

For long-term clients at the start of a new quarter or year.

Subject: [Year] — what's on your plate? Hi [Name], As we head into [Q/year], I wanted to check in. We've worked together on [project 1, project 2] — and I've noticed [observation about their business pattern]. I'm restructuring how I work with a few key clients in [year]: instead of project by project, I'm offering a small number of monthly arrangements so I can give more focused, consistent support. Given how we've worked together, I'd love to offer you one of those spots before I open them up more broadly. Would a 15-minute call this week make sense? [Your name]

Why it works: It creates genuine scarcity (limited spots), rewards the relationship (you're offered first), and anchors the decision in forward-looking planning — which feels collaborative, not transactional.

Retainer Pricing Templates

The most common mistake solo owners make is pricing a retainer like a discounted project. A retainer is a different product — it sells availability, consistency, and peace of mind. Price it that way.

THE BASELINE FORMULA

Start with your effective hourly rate (what you actually earn per hour of work, including admin and client management time). Then apply the retainer multiplier:

STEP	ACTION	EXAMPLE
1	Calculate your real hourly rate (monthly revenue ÷ hours worked)	$4,500 ÷ 60 hrs = $75/hr
2	Estimate monthly hours for this client	~12 hrs/month
3	Apply the availability premium (1.2–1.4×) Clients pay for guaranteed access	12 × $75 × 1.3 = $1,170
4	Round to a clean number	$1,200/month

THE THREE-TIER PACKAGING TEMPLATE

Offer three tiers. You won't always sell all three — the point is to give clients a frame of reference. Most will choose the middle option. The top tier makes the middle feel reasonable.

	ESSENTIAL	GROWTH	PARTNER
Price	$X/mo	$X × 1.7/mo	$X × 2.8/mo
Hours/access	~8 hrs	~14 hrs	Unlimited async
Response time	48 hrs	24 hrs	Same day
Deliverables	Defined scope	Defined + 1 flex item	Full scope + strategy
Reviews/calls	1/month	2/month	Weekly
Best for	Maintenance	Active growth	Hands-on partner

Tip: Replace X with your baseline calculation from the formula above. The multipliers (1.7× and 2.8×) are starting points — adjust based on how much more time/access each tier actually requires.

THE RETAINER PROPOSAL — ONE-PAGE STRUCTURE

SECTION	WHAT TO WRITE	LENGTH
The situation	Summarize their current pain point in their words	2–3 sentences
What changes	Describe what ongoing support looks like in practice	2–3 sentences
The options	Present your 3 tiers (use the table above)	Table
The ask	"Happy to start with a 3-month trial to see how it fits"	1 sentence
Next step	Single clear CTA: reply, book call, or sign	1 sentence

Objection Handlers

Most retainer conversations die at one of four objections. None of them actually mean "no" — they mean "I'm not sure yet." Here's how to navigate each one.

OBJECTION 1

"I don't have enough consistent work for a monthly arrangement."

This is actually the best reason to have one. "That's exactly the situation where a retainer helps the most. Right now you're coming to me when things are already urgent — which means you get squeezed into my schedule and you're under pressure. With a monthly arrangement, I'm already in your corner before things get urgent. You don't need to have consistent work — you need consistent access. That's what this gives you."

OBJECTION 2

"It's a big commitment — what if things slow down for us?"

Acknowledge it, then remove the risk. "Totally fair. That's why I always suggest starting with a 3-month trial. No long-term lock-in — we try it for a quarter, review it together, and decide from there. Most clients find that by month 2 they can't imagine going back to project-by-project. But if it's not working, we just don't renew. No awkwardness."

OBJECTION 3

"I think I'd rather just come to you as needed."

Show them what "as needed" actually costs. "The issue with as-needed is that by the time you need me, my schedule may not have space — or you're in a rush and can't wait. Retainer clients get priority scheduling and a faster turnaround. You also end up paying more on a per-project basis than on a monthly arrangement. The retainer isn't more expensive — it's the same work with better timing and less stress."

OBJECTION 4

"Can we just do a reduced rate for guaranteed volume?"

This is a reframing, not a discount request — treat it that way. "I hear you — you want predictability too, which is great. What I can do is structure the retainer so it's more cost-effective than our current project rate. The trade-off is it's a set monthly fee rather than pay-per-project. If you use everything included, you come out ahead. And honestly, most clients do."

FOUR PRINCIPLES TO KEEP IN MIND

Don't over-explain.

The more you justify the retainer, the more uncertain you sound. Present it confidently, then stop talking.

Let silence do work.

After you name the price, go quiet. The client needs space to process. Filling silence with discounts is the most common conversion killer.

Lead with outcomes, not hours.

"Peace of mind" and "already handled" close more retainers than "10 hours of my time per month."

The 3-month trial is your best tool.

Most objections dissolve when commitment shrinks. "Let's try it for a quarter" is almost always easier to say yes to than "let's sign an annual agreement."

One-Page Cheat Sheet

SITUATION	USE	KEY LINE
Just finished a project	Script 1	*"...ongoing attention rather than a one-off push"*
Client mentions pain	Script 2	*"Already handled"*
Inbound inquiry	Script 3	*"Want me to send a quick comparison?"*
Long-term client	Script 4	*"Before I open them up more broadly"*
Objection: no volume	Objection 1	*"You don't need consistent work — you need consistent access"*
Objection: commitment	Objection 2	*"3-month trial, no lock-in"*
Objection: as-needed	Objection 3	*"By the time you need me, my schedule may not have space"*
Objection: discount	Objection 4	*"More cost-effective than our current project rate"*

YOUR 30-DAY RETAINER ACTION PLAN

WEEK 1 List 5 past clients who could be retainer clients. Pick the top 2.

WEEK 2 Personalize Script 1 or 4 for each. Send them.

WEEK 3 Follow up on any replies. Have the pricing conversation using Section 2.

WEEK 4 Close at least one 3-month trial. Revisit the other conversation.

DAY 31 Review: what worked, what stalled. Adjust scripts and repeat.