Kaseya 365
Endpoint

How to retain clients with less effort

A checklist for MSPs

Did you know [retaining a client is up to six times more cost-effective](#) than finding a new one?

As competition in the MSP space grows, many providers are pouring resources into customer acquisition. However, turning these efforts into consistent results is easier said than done.

According to the [2024 Datto State of the MSP Report](#), 43% of MSPs say acquiring new customers is their biggest challenge. The [2025 MSP Benchmark Survey Report](#) echoes this, with 33% citing customer acquisition as a top hurdle.

While bringing in new clients remains essential, there's also a strong case for investing in retention. You're [60–70% more likely to sell to an existing customer than a new one](#), and in a tight labor market where skilled techs are in short supply, strengthening relationships with current clients can offer a more sustainable path to growth.

So, how do you grow your business and keep the clients you've worked so hard to win without burning out?

Start by making retention and acquisition a little more MSPeasy.

Read on for five practical ways to do it.

1 Deliver consistent, high-quality service

Why it matters

Great service is the foundation of client loyalty. When delivery is smooth, responsive and consistent, clients feel confident staying with you long-term. And with smart automation in place, you can maintain high standards without stretching your team thin.

Checklist to implement

- Automate routine tasks like patching, monitoring, backups and alerts to reduce errors and delays.

- Standardize service delivery with checklists and templates to ensure every client gets the same high level of support.

- Use reporting tools to keep clients informed about the work being done and the results you're delivering.

- Monitor SLAs and ticket metrics to proactively spot and fix any service gaps.

- Build in regular service reviews to show progress, address concerns and realign around client goals.

2 Prioritize proactive communication

Why it matters

Clients will leave if they don't know what you're doing for them, even if you're doing everything right. MSPs that communicate consistently build lasting trust and long-term partnerships.

Checklist to implement

- Schedule regular check-ins (monthly or quarterly) to review performance, address concerns and align on goals.

- Send real-time alerts when issues are detected or resolved, even for minor incidents.

- Share monthly activity summaries showing tickets resolved, updates completed and security threats blocked.

- Clearly define expectations around SLAs, coverage hours, escalation paths and next steps.

- Respond promptly to all inquiries — delays or silence erode client confidence.

3 Continually educate and upsell relevant services

Why it matters
Education builds trust and positions you as a strategic advisor. Clients who understand your services and use more of them are more loyal and less likely to leave.

Checklist to implement

- Regularly review each client's service usage to identify gaps in protection or productivity and recommend additional tools or upgrades (especially in cybersecurity) that can strengthen their operations.

- Send monthly or quarterly newsletters featuring actionable security tips, trends and updates.

- Host educational webinars or Q&A sessions on topics like phishing trends, password policies, regulatory risks or remote work security.

- Notify clients when new features or services are added to their stack and explain how these changes support their business goals.

- Use plain, business-focused language in all communications to make the value of your services easy to grasp and act on.

4 Show tangible value with reporting and ROI metrics

Why it matters
If the value of your work isn't made visible, especially early on, your clients may see you as an expense rather than a partner. Tangible reporting starts from onboarding and continues throughout the relationship.

Checklist to implement

- Kick off with a structured onboarding plan that includes a 30/60/90-day progress report highlighting early wins and key milestones.

- Send ongoing performance reports (monthly or quarterly) that detail completed work: patches, updates, incident resolution and backups.

- Use before-and-after comparisons to show improvements or measurable gains from specific implementations.

- Highlight business outcomes such as reduced downtime, cost savings and increased efficiency, not just technical results.

- Create client-specific KPIs and success roadmaps that tie your services directly to their goals.

Bring it all together

With the right tools in place, you can deliver consistent, high-quality service without relying on manual processes or overextending your team.

Kaseya 365 Endpoint makes that possible. It brings together essential endpoint management, security, backup and automation in one affordable, integrated solution, making it easier to protect your clients, show value and strengthen long-term relationships.