

# Managing the Agency-Client Relationship Life Cycle with SE Ranking

Equip your agency with a roadmap that helps you excel at every client touchpoint. See how you can use SE Ranking to generate high-quality leads, craft winning pitches, onboard new clients, implement impactful SEO strategies, and retain clients with insightful reporting.



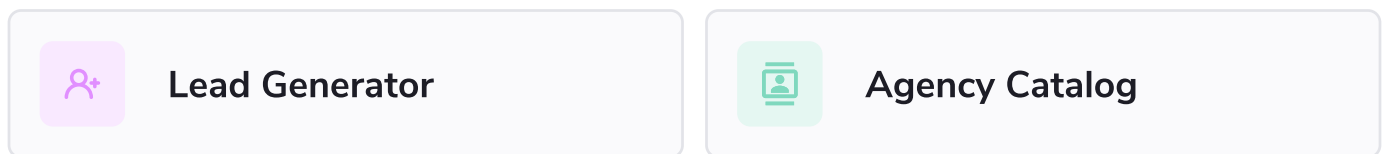
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# Inbound Lead Generation

Inbound lead generation allows agencies to get a steady stream of qualified leads who are already interested in your services. This process translates to a more efficient use of your team's resources, as less effort is required to engage and convert inbound prospects into customers.

## SE Ranking's solutions for effective inbound lead generation:



LEADS		
72 TODAY	50 PER MONTH	58 AVG. PER DAY
AUDIT PAGE URL	LEAD INFO	
<input type="checkbox"/> <a href="https://www.g2.com/products/se-rankin...">https://www.g2.com/products/se-rankin...</a>	Dianne Russell dianne.russel@outlook.com	
<input type="checkbox"/> <a href="https://www.capterra.com/p/142169/SE...">https://www.capterra.com/p/142169/SE...</a>	Megan Smith megan.design@gmail.com	
<input type="checkbox"/> <a href="https://www.getapp.com/marketing-soft...">https://www.getapp.com/marketing-soft...</a>	Dianne Russell dianne.russel@outlook.com	

When visitors land on your agency's website, you need a system for converting them into leads. The most effective strategy is to provide something valuable in exchange for their contact details. This is exactly what **SE Ranking's Lead Generator tool** is designed to do.







Once embedded on your site, this widget lets website visitors run a **free On-Page SEO Checker audit**. In return, they will receive an in-depth SEO report for a particular URL, while you gain the prospect's contact details and insights into their SEO requirements.




**This provides you with the perfect foundation to customize your sales pitch. It also helps you save money on growing your email marketing list.**

## Lead Generator functionality allows you to:

- Choose a widget or combine several forms (button, pop-up, webform, push notification, or modal window).
- Create new widgets and select the shape and color that matches your brand.
- Craft compelling text for the header and description.
- Add 'thank you' messages.
- Decide where on the page to place your widget.

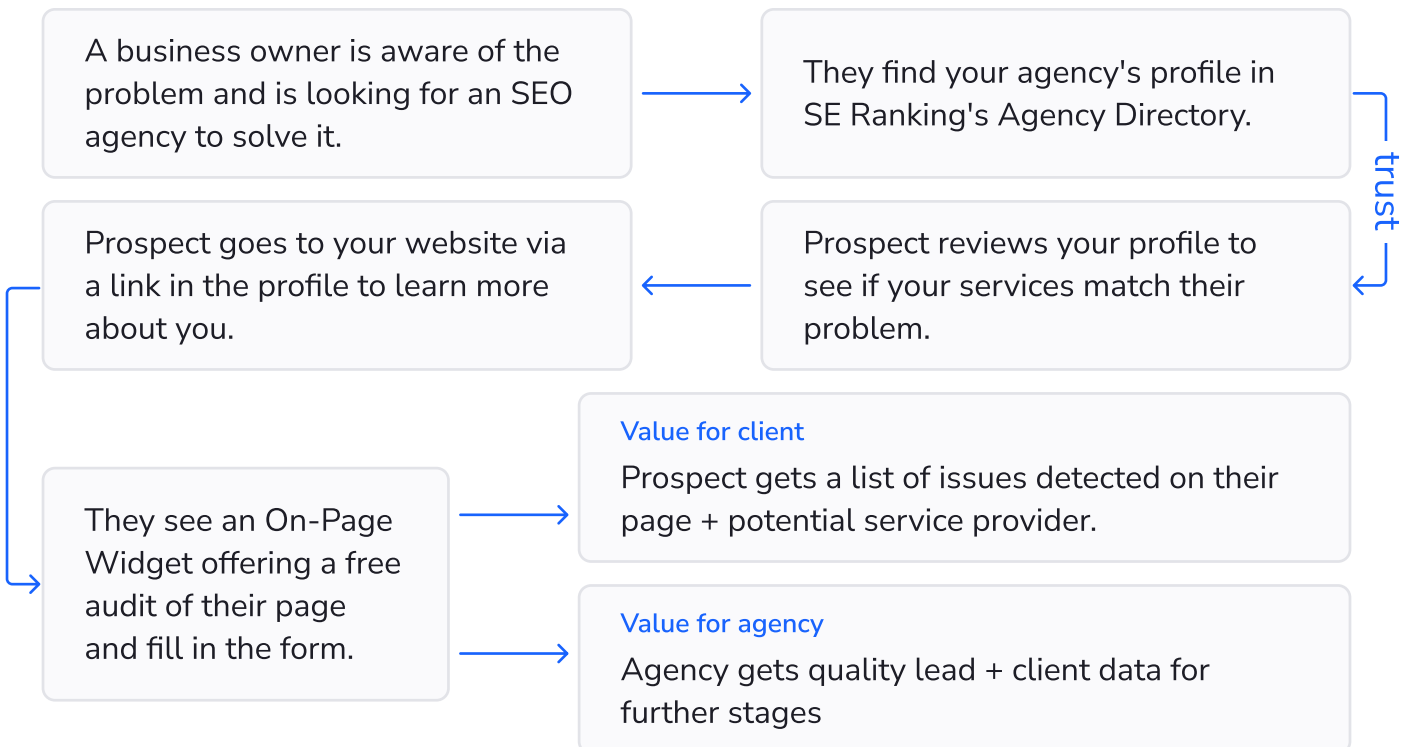
You can also enhance your agency's lead generation efforts and increase brand visibility by getting your agency featured in **SE Ranking's Agency Catalog**.

	<b>Agency Name</b> <a href="https://agency.name">https://agency.name</a>
	Location: Barcelona (Spain)
	Services: Digital Marketing, General SEO <b>+11</b>
	Industries: Technology, Healthcare, Retail <b>+3</b>
	Budget: No minimum budget
	Team size: 100+

-  This increases your agency's chance of being noticed by potential clients.
-  Having your profile within the directory positions your agency as a credible and reliable choice for SEO services.
-  Your profile includes a link to your website, allowing interested clients to learn more about your services and approaches.

Combining these two tools increases your chances of attracting quality leads.

**Here's how it works:**



This approach draws in customers who are actively seeking an SEO service provider. But some potential clients might not even know that SEO challenges are what's blocking their path to the top. For these prospects, a more direct outreach approach is necessary. That's what the next section is about.

# Outreaching, Scoring, and Pitching

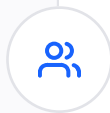
While the ideal scenario for any SEO agency involves having a consistent stream of qualified leads, the reality is often more nuanced than that. Sometimes, the path to securing a client requires different strategies, and each must be tailored to the unique challenges faced by each agency.

**The following info displays the most common scenarios and how SE Ranking helps address them:**

## **The Outreach Takeover**

If the number of inbound leads isn't sufficient, or you don't want to rely solely on inbound strategies, proactive outreach becomes vital. This involves **research into identifying prospects' weaknesses and finding opportunities for improvement.**

### **Competitive Research Tool**




- Profile prospects, assessing their and their competitors' digital presence.
- Detect weaknesses in prospects' SEO strategies (poorly targeted keywords, insufficient backlinks, etc.)
- Use this data as conversation starters or items for your initial pitch.

### **Website Audit Tool**



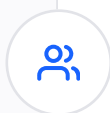
- Reveal critical SEO issues on a prospect's website that they may be unaware of, and use what you find as a reason to engage with them.
- Communicate urgent SEO issues that could be affecting their business now, and then present solutions.

 By using a personalized outreach plan that highlights the prospect's areas for improvement and articulates the agency's ability to provide solutions, you set the stage for a strong pitch.

## **The Scoring Dilemma**

Whether you're juggling a surge of potential clients who are thinking of using your agency as their SEO service provider, or you're navigating through a steady stream of prospects, you need to **assess the quality of each lead. Get clear on how well they mesh with what your agency offers.** This is where lead scoring comes in handy.

## Competitive Research Tool



- Analyze the prospective client's domain metrics to gauge their current market position and potential for growth.

## Website Audit Tool



- Score leads based on the severity/urgency of issues detected.
- Determine if the lead's issues match the agency's expertise and resource availability.

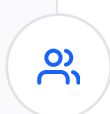


By analyzing leads from different angles, you can prioritize and invest your team's resources into prospects who are most likely to convert and whose needs align with your agency's strengths.

## The Skeptical Lead

This lead recognizes the need for SEO but they aren't sure yet if your agency is the right fit for the job. Your task is to **transform doubt into trust and interest into action**. This is where a well-crafted pitch can make a big difference.

## Competitive Research Tool



- Analyze the lead's website to demonstrate how their domain stacks up against competitors.
- Pinpoint where they're losing organic traffic.
- Identify lucrative keyword opportunities they've missed. And more.

## Website Audit Tool



- Check your lead's website to detect technical errors.
- Analyze your lead's industry leaders and their competitors' websites to find relevant or major issues.
- Explain how addressing each identified issue will enhance your lead's online presence.
- Highlight quick wins.



By presenting both concrete data and personalized insights that resonate with the prospective client and their unique situation, you can boost your pitch and transform their skepticism into trust.

Now, these were just a few examples. Depending on what your lead is struggling with, you may encounter a ton of other SE Ranking features: If you have a lead that is trying to strengthen their backlink strategy, you can leverage insights from our Backlink Checker and Gap Analyzer to enhance your pitch. If your lead is focused on local SEO, our Local Marketing Module can provide the targeted data you need.

# Onboarding and Setting up Your Client's Project

Once you have the deal set in place, now it's time to onboard your new clients and set up their projects. The onboarding process establishes clear communication between you and your client, sets expectations, and ensures that the tools and strategies you plan to use align with the client's goals.

SE Ranking's extensive project toolset provides you with the tools you need to customize your SEO efforts right from the start.

**Here's how it works, given the different requests that the client might have:**

Client request	SE Ranking Tool	How it works for agencies
Enhance site technical health	Website Audit	Set up a website audit to identify and fix technical issues: <ul style="list-style-type: none"><li>• Create a website audit schedule.</li><li>• Choose pages for the system to scan.</li><li>• Select scanning rules or create custom ones.</li><li>• Set up lists of issues to monitor according to your client's goals.</li></ul>
Improve keyword visibility	Keyword Rank Tracker	Configure the tools to get precise daily ranking updates on all client's target keywords, starting from day 1 of your collaboration: <ul style="list-style-type: none"><li>• Add keywords and search engines.</li><li>• Add target URLs for important pages.</li><li>• Group &amp; tag client's keyword lists.</li><li>• Create keyword notes.</li></ul>
Make decision-making data-driven	Analytics&Traffic module	Add client's analytical tools to track traffic, clicks, etc., from multiple sources, and fine-tune their strategies. <ul style="list-style-type: none"><li>• Connect Google Search Console.</li><li>• Connect Google Analytics.</li><li>• Connect Matomo Analytics.</li></ul>



Outline SEO strategy	Marketing Plan	<p>Agree on tasks that need to be solved:</p> <ul style="list-style-type: none"> <li>• Follow the to-do list generated for your specific project or set your own tasks.</li> <li>• Assign task priority and update statuses.</li> <li>• Assign tasks to team members and manage them.</li> </ul>
Analyze competitive strategies	My Competitors Module	<p>Specify the client's competitors and see their positions for your target queries.</p> <ul style="list-style-type: none"> <li>• Add up to 20 competitors to track, and see how their positions change over time.</li> <li>• Highlight client competitors for easier analysis.</li> <li>• Assign tags to a domain and a specific URL.</li> </ul>
Monitor crucial web page updates	Page Changes Monitor	<p>Define important pages and get notifications whenever changes are made to them:</p> <ul style="list-style-type: none"> <li>• Add the client's pages for monitoring manually or import them from the file.</li> <li>• Add competitive pages to get updates when the client's rivals make alterations.</li> <li>• Choose among 16 changes to monitor.</li> <li>• Select scanning frequency and specify which emails to get notifications about in the inbox.</li> </ul>
Develop/improve a backlink strategy	Backlink Monitor	<p>Get data on the client's backlinks and the pages they link to:</p> <ul style="list-style-type: none"> <li>• Add links yourself or import them from your client's GSC.</li> <li>• Select if you want the backlink status to be automatically checked.</li> <li>• Specify if you want new backlinks to be uploaded from the client's GSC automatically.</li> <li>• Create backlink groups and add notes.</li> </ul>



By setting up SE Ranking's project tools during the onboarding stage, you're setting the foundation for regular project tracking. This practice also helps you make timely adjustments to strategies based on real-time data and analytics.

# Managing Projects and Optimizing Team Collaboration

When SEO agencies have to juggle multiple projects, they often come across a complex set of challenges, many of which can dampen their efficiency and team collaboration.

 Agency's challenge	 SE Ranking's response
<b>Handling numerous projects at once</b> Some SEO tools have project addition limits. This can hurt agencies' capacity to serve multiple clients effectively. It may also force them to use several different tools.	<b>Unlimited client projects within the platform</b> Starting from the Pro pricing plan, SE Ranking lets you create as many projects as you need, and provides access to project tools and features. Lower plans allow you to create and manage up to 10 projects.
<b>Limited user seats for collaboration</b> Many SEO tools have restrictions on the available number of user seats, making it difficult to involve the entire team where necessary.	<b>Additional user seats included in subscriptions</b> SE Ranking's range of subscriptions already include 1/3/5 manager seats. Additional manager seats are available at just \$20/mo per seat.
<b>Lack of customized access</b> Many SEO platforms don't offer the flexibility to customize user access based on different team members' individual roles.	<b>Customizable access for users</b> Our system lets you control user access. You can configure sub-users' ability to add/delete/edit keywords, or their ability to alter search engines, audit frequency, and search depth.
<b>Communication barriers</b> Agencies often struggle to keep every team member on the same page, leading to miscommunication, duplicated efforts, and delays.	<b>Streamlined communication</b> Use multiple email notifications to keep the entire team in the loop. Add notes within the tools to share updates and insights, and flag issues to your team.

# Doing the SEO Heavy Lifting with Proper Tools

Achieving outstanding results for clients requires more than just expertise and hard work. You need the right tools. These tools will be your greatest allies and will empower your agency to implement projects effectively.

**No matter the task at hand, SE Ranking makes sure that the right tool is always at your disposal.**



## Keywords

Collect the right keywords for your client to target with the Keyword Research tool. Use the Keyword Grouper to cluster search queries to further distribute keywords across your client's website.



## Backlinks

Analyze the backlink profile of any website with Backlink Checker. Keep track of your customers' backlinks and their statuses with Backlink Monitor. Detect link-building opportunities with Backlink Gap Analyzer.



## Competitors

Discover the marketing strategies of your client's competitors with Competitive Research. View their website's traffic dynamics in both organic and paid campaigns, and compare the client's keyword list to that of their rivals.



## Website Health

Analyze client websites (and their pages) for SEO issues with the Website Audit tool and the On-Page SEO Checker. Get practical recommendations on elevating page performance and crafting custom tasks. Monitor the status of every important page with the Page Changes Monitor.



## Content Marketing

Create content briefs, let artificial intelligence help you create content faster, and evaluate texts based on brief requirements and readability standards, all with the Content Marketing Module. Also, identify and review top-performing pages for your target keywords with the SERP Analyzer.



## Local Marketing

Get comprehensive reports on issues in your clients' business listings within the Local Marketing Module. View clients' listing statuses in real-time and fix detected errors. Manage your client's reputation by analyzing keywords used in reviews.



## API

Integrate your agency's software with SE Ranking's SEO tools and services. Use API to get a seamless flow of data between SE Ranking and your internal system. Access the platform's features, pull data from different tools, automate repetitive tasks, enhance data analysis, etc.



## Integrations

Integrations ensure that tools can communicate, data flows smoothly, and that your agency can make data-driven decisions. With SE Ranking, agencies can effortlessly connect to GSC, GA4, Google Business Profile, Matomo Analytics, Zapier, Reportz, SeoTools for Excel, etc.

To deliver top results, SEO tools must have quality datasets at their core and utilize top-notch algorithms:

- Quality datasets mean accurate information you can rely on.
- Advanced algorithms are crucial for interpreting this data well. They offer actionable and relevant insights.

**SE Ranking has vast datasets and algorithms that you and your clients can trust:**

✓ **180 countries, 4B+ keywords, 2B+ domain profiles, and 3T backlinks indexed.**

✓ **AI-powered algorithms and NLP techniques** for precise data processing.

✓ **Ungrouped search volume values**, even for similar keywords.

✓ **Upgraded organic traffic estimation**; currently 29% more accurate than before.

# Monitoring the Client's Project

Monitoring the project's SEO progress is critical to the client's success. Agencies can fine-tune their strategies by keeping a close eye on the project's progress. This makes it possible to make data-driven decisions to optimize performance and achieve better results for clients.

To properly track SEO, you need to first identify metrics that align with your client's business goals. After that, you must carry out your tracking plan using the most appropriate analytics tools.

**While metrics can vary depending on the client's objective, the tools and features below will make your SEO monitoring more effective:**



## Monitor rankings with Keyword Rank Tracker

Track keyword rankings regularly across major search engines. See dozens of essential SEO metrics like search volume, difficulty, traffic forecast, SERP features, content score, etc. Use a calendar to choose different timeframes and compare results with a baseline date.



## Monitor website technical health with Website Audit

Get a comprehensive overview of a website's technical health. Create a schedule for website checks, specify pages and issues to monitor, and get notifications once the audit is ready. Compare audit results to see your progress by using the Crawl Comparison feature.



## Monitor the website's search visibility with the My Competitors Module

Analyzing search visibility helps you understand how often your client's domain shows up in search to potential users. This metric also lets you see who else is appearing to users in search results after entering the search query your client is targeting.



## Monitor backlinks with the Backlink Monitor

Evaluate the total number of backlinks and their growth dynamics. See how many backlinks were added and lost in different interval periods. Also, analyze (over different timeframes) the ratio of backlinks leading to the homepage, other pages, and dofollow and nofollow backlinks.

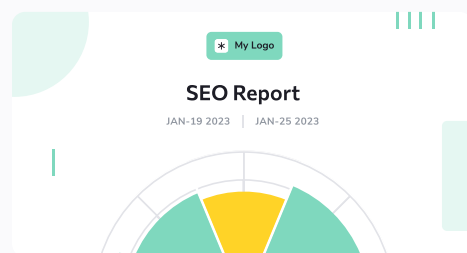
# Retaining Clients with Regular Reporting

Regular reporting and effective communication ensures that clients are informed about the progress. You can use these processes to help clients understand the impact of your agency's SEO efforts. SE Ranking helps you deliver clear, concise, and relevant updates that foster trust, align strategies, and retain clients.

**Depending on your client's preferences and your agency's overall strategy, there are several useful ways to present your progress:**

## Static reporting

If your clients prefer aesthetically pleasing but equally comprehensive reports in PDF format, use **SE Ranking's Report Builder**.



This tool offers **12+ ready-to-go SEO reporting templates** for reporting on traffic, rankings, website technical health, competitors, and more. You can use the templates as is, customize them to suit your client's specific needs, or create new ones from scratch.

You also have the option to send **unlimited manual reports**. This holds true regardless of your pricing plan or if you opt for **5, 20, or 50 automatic scheduled reports** per month. With the Agency Pack, you can send **unlimited automated reports** to keep your clients constantly updated.

## Real-time reporting

If you are ready to offer more freedom to your clients, give them access to the platform so they can see their **SEO progress in real-time**.

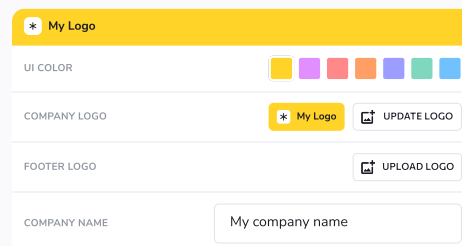
Users		
NAME	EMAIL	ACCOUNT TYPE
> 7 Devon Lane	ewaters@comcast.net	Owner
> 51 Mark Kleiner	m.klnr@outlook.com	Client
> 65 Harry Leddington	yeedancer@gmail.com	Client
> 21 Kathryn Murphy	dowdy@yahoo.com	Manager
> 65 Harry Leddington	leocharre@aol.com	Manager

SE Ranking's Agency Pack provides **10 client seats**. This type of access allows your clients to review specific data, monitor SEO activities and progress, and track achievements. You can also decide which dashboards and tools to give your customers access to. This means you can show important information without distracting them with unexpected changes or ongoing issues.

Extra client seats can be purchased for just **just \$4 each**.

You can also share **guest links with view-only access**. This allows your clients to see specific information and tools within the SE Ranking platform, which ultimately results in a trusting and open agency-client relationship.

You can also use the **White Label** feature to make the SE Ranking platform look like your own. Match the platform with your agency's identity by:

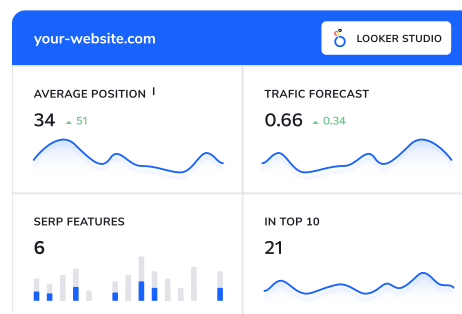


- Applying your agency's domain name and removing all references to SE Ranking.
- Customizing the interface and login page with your agency's colors, logos, and other brand elements.
- Tailoring the headers and footers to fit your brand's style.
- Customizing service emails.

When sharing access to the platform, your clients will notice that it fully embodies your agency's brand image. They'll also get a seamless experience.

## SE Ranking's reports in Google Looker Studio

Some clients prefer using Google Looker Studio to view their SEO progress. Use SE Ranking's integration with GLS to showcase and visualize the following: ranking data, website tech audit results, competitors' metrics, etc.



You can connect data sources and share links with your clients. This will allow them to access the latest report data at any time. This integration allows you to create customized dashboards and tailor them to each client's needs, which makes it possible to deliver more sophisticated and nuanced reports.

# Best Value for Your Agency's Budget

SE Ranking's true value goes well beyond its robust capabilities. Yes, it provides features for every level of the agency-client relationship, but it achieves this while also being budget-friendly.

SE Ranking stands out for its flexible pricing structure, which was designed to accommodate the diverse requirements of small to mid-sized agencies.

Let's take a look:

## Pro pricing plan

\$109.00 per month, or \$87.20 per month with an annual subscription

## Business pricing plan

\$239.00 per month, or \$191.20 per month with an annual subscription.

You can also customize the limits and features of your plan to suit your client's specific needs.

Our special **Agency Pack Add-on** is available for \$50 per month, but only as an extension to the annual subscription to SE Ranking's Pro and Business plans.

This package includes the following agency-first features that we already mentioned:



White Label SEO Software



10 additional client seats



Unlimited scheduled reports



White-labeled reports



100 leads from the Lead Generator widget



Your agency's profile in the Agency Catalog

You can also retain access to all your historical SEO data. Simply use our **free migration** option to transfer data from your legacy tool to SE Ranking.

SE Ranking even offers several team onboarding features for your agency so you can easily launch and carry out your client's project:



**Priority support:** SE Ranking's support managers are available to communicate with you in live chats or via phone calls. They can help you solve any platform-related issues.



**Account manager:** A personal manager will discuss product issues with you, hold onboarding meetings, and help you with updates, upgrades, migrations, etc.



**Team training:** SE Ranking experts will hold sessions to guide you through every last corner of the platform. Each will tailor their instructions to your agency's unique needs.



**Onboarding call:** A one-on-one meeting with an SE Ranking specialist. This expert will explain how the platform works and show you how to use it.



**SE Ranking Academy:** Courses run by experts, all packed with tried-and-true tips, strategies, and info on trends. Use these courses to boost your clients' projects.