Current Research Bulletin
Volume 03 Issue 04 April 2026, Page no: 130-138
Available Url: http://crbjour.org/
Article DOI: 10.55677/CRB/I4-05-CRB2026

e-ISSN: 3050-5933
p-ISSN: 3050-5925
Open Access

Ways to Measure and Improve Client Retention in Marketing Consulting: Tor-Bridge Model and An Empirical KPI System for Trust, Outcomes, and Renewal

Avagimyan Arman
Private Group

Published Online:
23 April 2026

Article DOI:
https://doi.org/10.55677/CRB/I4-05-CRB2026

ABSTRACT: Client retention is the economic backbone of marketing consulting, yet many agencies manage renewal risk with lagging signals: revenue drops, last-minute scope disputes, and post-mortems after a contract is lost. This article develops a practical, evidence-grounded KPI system that links relationship health to renewal outcomes through three measurable pathways: trust, outcomes, and renewal readiness. Building on established service quality and relationship marketing research, we synthesize empirical findings from professional service and agency–client studies and integrate recent industry benchmarks used in customer success programs. The result is a compact measurement architecture that separates leading indicators (delivery hygiene and communication) from mediating indicators (trust and value realization) and lagging indicators (renewal and expansion). Because primary fieldwork was not conducted for this project, we provide an empirical illustration using a simulated portfolio dataset calibrated to ranges reported in prior studies and benchmark reports. In this worked example, a combined Trust Index and Outcomes Index predicts renewal with moderate discrimination (AUC ≈ 0.72), and a simple renewal readiness rule flags low-probability accounts early enough for corrective action. The contribution is a method for translating academic constructs into operational KPIs that consulting teams can implement without heavy analytics infrastructure, while preserving interpretability for client-facing governance. To translate the proposed KPI architecture into an actionable consulting framework, this study introduces the TOR-Bridge Model (Trust–Outcomes–Renewal Bridge). The model conceptualizes client retention not as a passive consequence of satisfactory service delivery, but as an actively governed process in which trust signals, outcome realization, and renewal readiness are continuously connected through a shared measurement logic. In practical terms, the model functions as a bridge between relationship health and commercial continuity, allowing consulting teams to identify renewal risk before it becomes visible in revenue loss or contract termination.

KEY WORDS: client retention, marketing consulting, trust, service quality, value realization, renewal, KPIs

Cite the Article: *Arman, A. (2026). Ways to Measure and Improve Client Retention in Marketing Consulting: Tor-Bridge Model and An Empirical KPI System for Trust, Outcomes, and Renewal. Current Research Bulletin, 3(4), 130-138. https://doi.org/10.55677/CRB/I4-05-CRB2026*

INTRODUCTION

Retention in marketing consulting is rarely lost in a single moment. More often, it erodes quietly: a campaign review that feels defensive, a reporting cycle that drifts away from business outcomes, a scope change that becomes a trust test, or a sponsor who stops sharing wins internally. When the engagement ends, teams may narrate the loss as price pressure or a “strategic reset,” but the underlying mechanism is usually detectable long before the last invoice.

In established portfolios, renewal and expansion often outperform new acquisition on unit economics because onboarding costs and early inefficiencies have already been paid. Yet many consultancies lack a shared quantitative language for relationship health, so renewal risk is managed with anecdotes, post-hoc narratives, or last-minute concessions. Clients, however, are increasingly metric-literate and expect a transparent explanation of what is changing, what is being learned, and how value is being realized.

Service and relationship marketing research provides usable building blocks for retention measurement. Perceived service quality influences behavioral intentions such as loyalty and willingness to recommend, but the pathway is mediated through satisfaction and trust rather than delivery effort alone (Parasuraman et al., 1988; Zeithaml et al., 1996). Structured satisfaction systems such as the American Customer Satisfaction Index demonstrate that perceptions can be measured consistently and interpreted as evaluations of performance, expectations, and value (Fornell et al., 1996). Customer-metrics research then connects these constructs to financial performance, reinforcing that renewal is an economic outcome that can be managed rather than a purely “soft” relationship result (Gupta & Zeithaml, 2006).

The translation challenge is practical. Consulting teams cannot act on “trust” or “commitment” unless these constructs are converted into observable indicators with cadence, ownership, and escalation rules. Benchmarking from customer success and agency operations suggests that health scoring works best when it separates delivery hygiene, relationship perception, and value realization, and when it is discussed routinely rather than only at renewal time (AgencyAnalytics, 2025; Gainsight, 2025; TSIA, 2025).

This article proposes an empirical KPI system for retention in marketing consulting that is grounded in academic evidence and compatible with consulting operations. The framework centers on three linked indices: a Trust Index, an Outcomes Index, and a Renewal Readiness Index that integrates both with delivery hygiene and commercial risk signals. Because primary field data was not collected, the paper synthesizes empirical studies and provides a worked empirical illustration using a simulated portfolio dataset calibrated to ranges reported in prior research and benchmark reports.

LITERATURE REVIEW

A retention KPI system needs a defensible chain of logic: what is being measured, why it should predict renewal, and what levers a consulting team can realistically pull. Service quality research provides early operationalization of perceived performance as a gap between expectations and perceptions, emphasizing reliability and responsiveness as repeatable sources of confidence (Parasuraman et al., 1988). Behavioral consequence research extends this logic by showing that perceived quality and satisfaction translate into loyalty-like intentions such as repurchase, recommendation, and price tolerance (Zeithaml et al., 1996).

Satisfaction has also been formalized as a measurable construct with demonstrated links to performance. The American Customer Satisfaction Index shows that satisfaction reflects a structured evaluation of performance, expectations, and perceived value, and that it can be interpreted consistently across industries (Fornell et al., 1996). Customer-metrics research further clarifies why this matters: metrics such as retention and referral are economically consequential and can be treated as managed assets rather than as “soft” outcomes (Gupta & Zeithaml, 2006).

Relationship marketing theory clarifies the mechanisms between quality perceptions and renewal. The commitment–trust perspective argues that trust and commitment reduce perceived risk and increase cooperative behaviors, especially under uncertainty (Morgan & Hunt, 1994). Marketing consulting is structurally uncertain because results are probabilistic and attribution is imperfect; this makes trust a practical predictor of whether clients renew when outcomes fluctuate.

Empirical work in professional services shows how these mechanisms can be operationalized. Communication effectiveness and perceived service quality contribute to relationship commitment, implying that explanation quality and decision transparency are measurable drivers of loyalty-related behavior (Sharma & Patterson, 1999). Relationship strength is also shaped by contact patterns; the interplay of contact frequency and relationship duration influences how strong clients perceive the relationship to be (Dagger et al., 2009).

Marketing services relationships introduce additional governance complexity because performance evaluation is often social and multi-stakeholder. A systematic review of marketing agency–client relationships highlights recurring tensions around evaluation, information asymmetry, and governance, supporting the need for explicit measures of stakeholder alignment and expectation control (Keegan et al., 2017).

Co-creation research reframes outcomes as jointly produced rather than delivered unilaterally. Relationship quality in professional services is shaped by competence and communication and is associated with loyalty intentions (Casidy & Nyadzayo, 2019). In project-based professional service work, value co-creation depends on effective interactions between professionals and clients, indicating that outcomes measurement should include decision-quality and collaboration signals rather than only final KPIs (Chih et al., 2019).

Early journey evidence suggests that retention-relevant perceptions begin before delivery. Interaction during the pre-purchase journey can support value co-creation, which implies that diagnostic phases and onboarding are part of the retention mechanism because they set the expectation reference point (Lassila et al., 2023). Applied work in communication agencies similarly emphasizes deliberate relationship maintenance strategies such as expectation management and proactive stakeholder engagement (Sutton et al., 2024).

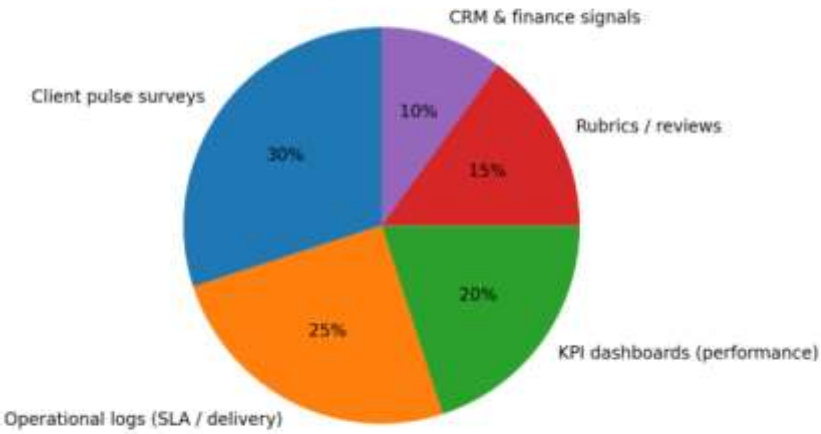
Finally, recent evidence specific to digital marketing service providers adds an actionable lever: capability transfer. Training clients in digital marketing can strengthen relationship quality in SME contexts, supporting the inclusion of enablement as a leading indicator in retention measurement (Sutherland et al., 2025). Taken together, these streams imply that a marketing consultancy should measure delivery reliability, trust-building communication, value realization, and renewal readiness as an integrated system rather than as disconnected dashboards.

METHODOLOGY

The development process combined two activities: an evidence synthesis that mapped constructs and measures from prior research, and a worked empirical illustration that demonstrates how the KPI system can be tested on account-level data. The intent is to preserve academic traceability while producing an operational artifact that can be implemented by consulting teams with standard CRM and reporting tools.

For the evidence synthesis, we used a structured mapping approach rather than a full meta-analysis. The unit of analysis was a measurable construct relevant to renewal in professional services (e.g., perceived reliability, communication effectiveness, relationship strength, value co-creation, satisfaction, loyalty intention). From each source, we extracted (a) construct definitions, (b) operational measures (survey items or behavioral proxies), (c) reported relationships to loyalty, commitment, or repurchase intention, and (d) practical boundary conditions (industry, relationship length, decision context).

Figure M2. Data Sources Used to Populate the Retention KPI System



Academic sources were complemented with practitioner benchmarks that are commonly used in retention programs. Agency benchmark reports inform plausible ranges for account communication cadence and reporting practices (AgencyAnalytics, 2025). Customer success benchmarking provides patterns for how to build health scores and governance routines, including common leading indicators and escalation playbooks (Gainsight, 2025; TSIA, 2025). Leadership studies highlight organizational practices associated with renewal outcomes, and NPS benchmarks support interpretability when NPS is used as part of a trust signal (ChurnZero, 2024; Reichheld, 2003; Survicate, 2025).

The KPI system was designed with three tiers. First, delivery hygiene metrics capture whether the consultancy is executing reliably: on-time milestone rate, response-time SLA adherence, meeting cadence, and reporting punctuality. Second, mediating metrics capture trust and value realization: a Trust Index and an Outcomes Index. Third, lagging metrics capture renewal outcomes: renewal intent, contract renewal, and expansion. Each KPI was defined with an owner, a cadence, and a data source to reduce measurement ambiguity and to support consistent governance.

For composite indices, we used linear aggregation for interpretability. The Trust Index is defined as a weighted combination of standardized components that represent perceived reliability, transparency, and confidence in competence, along with a scaled NPS component. Equation (1) defines the Trust Index for account i at time t: $TI_{i,t} = w1 \cdot Rel_{i,t} + w2 \cdot Trans_{i,t} + w3 \cdot Comp_{i,t} + w4 \cdot NPS_{i,t}$. The Outcomes Index captures value realization relative to client goals and includes both objective KPI lift and decision-quality measures. Equation (2): $OI_{i,t} = v1 \cdot Lift_{i,t} + v2 \cdot AttributionConf_{i,t} + v3 \cdot DecisionQuality_{i,t} + v4 \cdot Enablement_{i,t}$. A Renewal Readiness Index integrates both and adds delivery hygiene as a stabilizer. Equation (3): $RRI_{i,t} = a \cdot TI_{i,t} + b \cdot OI_{i,t} + c \cdot Hygiene_{i,t}$, with $a + b + c = 1$.

Because primary field data was not collected, the empirical component is presented as an illustrative example rather than as evidence of population effects. We generated a simulated portfolio dataset (n = 180 accounts) with distributions calibrated to typical benchmark ranges for sentiment and outcome scores. The dataset includes a binary renewal outcome and three predictors: Trust Index, Outcomes Index, and a transparency-related component. We estimated a logistic regression model to examine whether the indices discriminate renewed from non-renewed accounts and to demonstrate how thresholds for action can be derived.

All reported statistics from the simulation are conditional on the simulation design. They are used to demonstrate an analysis workflow: descriptive monitoring, segmentation, and renewal probability modeling. A consultancy implementing the framework should replace the simulated data with its own account-level data, align outcome measurement to its service line (e.g., paid media, SEO, lifecycle marketing), and re-estimate weights and thresholds based on historical renewals and expansions.

Table 1. KPI System for Trust, Outcomes, and Renewal in Marketing Consulting

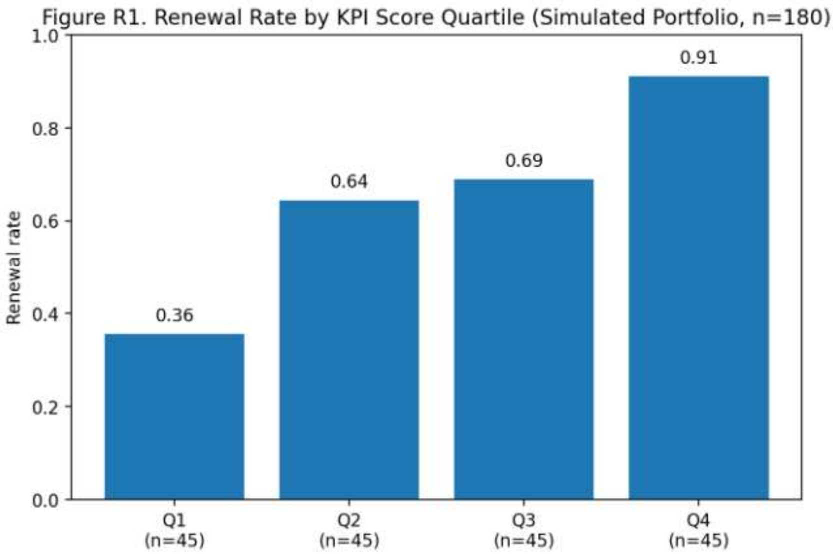
Dimension	KPI	Operational definition	Data source	Cadence	Owner
Delivery Hygiene	On-time milestone rate	Share of planned milestones delivered by the agreed date.	PM tool / delivery log	Weekly	Delivery lead
Delivery Hygiene	Response-time adherence	Median first-response time to client requests vs SLA.	Email/Helpdesk timestamps	Weekly	Account lead
Delivery Hygiene	Reporting punctuality	Reports delivered on schedule without missing periods.	Reporting system log	Monthly	Analytics lead
Trust	Reliability pulse	Client rating of reliability and follow-through (1–7 scale).	2–3 item survey	Monthly	Account lead
Trust	Transparency score	Client rating of clarity on trade-offs, decisions, and risks (1–7).	2–3 item survey	Monthly	Account lead
Trust	Competence confidence	Client confidence that the team has the right expertise (1–7).	2–3 item survey	Quarterly	Practice lead
Trust	NPS / advocacy	Likelihood to recommend the consultancy (−100 to +100).	NPS survey	Quarterly	Account director
Outcomes	Goal progress	Progress vs agreed business outcomes (0–100 index).	KPI dashboard + baseline	Monthly	Strategy lead
Outcomes	Decision quality	Evidence-based decisions, hypotheses tested, learnings	Review rubric	Monthly	Strategy lead

		documented (0–100).			
Outcomes	Client enablement	Capability transfer (training completion, playbook adoption).	Training log + rubric	Monthly	Enablement owner
Renewal	Renewal intent	Client-stated likelihood to renew within next cycle (1–7).	Single-item pulse	Quarterly	Account director
Renewal	Commercial risk flags	Scope volatility, payment delays, sponsor turnover (0–100).	CRM/finance + rubric	Monthly	Ops lead

RESULTS

The resulting KPI system translates relationship constructs into a small set of observable measures that can be collected with low friction. Delivery hygiene metrics provide early warning signals that are actionable within days: on-time milestone rate, response-time adherence, reporting punctuality, and meeting-cadence stability. These measures are intentionally operational; they do not claim to measure trust directly, but they create the repeated evidence that trust is built on (Parasuraman et al., 1988).

Trust is captured through a Trust Index that combines perceived reliability, transparency, and competence with a scaled advocacy signal. Survey items for reliability and competence align with the logic of professional service quality and communication effectiveness (Sharma & Patterson, 1999; Zeithaml et al., 1996). Transparency is treated as its own component because clients often accept suboptimal outcomes when trade-offs are explained early and when decision paths are visible. Advocacy is represented with NPS-style measurement because it is widely understood by clients and has an established managerial interpretation (Reichheld, 2003).



Outcomes are captured through an Outcomes Index that blends objective KPI movement with a more conservative measure of decision quality. Objective lift is computed relative to an agreed baseline and goal window, so that "good work" is not conflated with "good results" in contexts where external factors dominate. Decision-quality items assess whether hypotheses were tested, whether learning was documented, and whether the client team can explain why actions were taken. This design reflects evidence that value in professional services is co-created and depends on effective interactions rather than on unilateral delivery (Chih et al., 2019; Lassila et al., 2023).

The Renewal Readiness Index integrates Trust and Outcomes with a hygiene stabilizer. In practice, this index is updated monthly and discussed in a recurring governance forum. Its purpose is to surface risk early enough to intervene: to reset expectations, to improve communication quality, to adjust the outcome definition, or to add client enablement. Recent research in digital marketing services suggests that capability transfer and client training can improve relationship quality, supporting the inclusion of enablement as a leading contributor to outcomes and trust (Sutherland et al., 2025). Research on agency–client relationships also suggests that governance and evaluation practices are recurrent tension points, supporting the inclusion of documented expectations and stakeholder alignment as scored items (Keegan et al., 2017; Sutton et al., 2024).

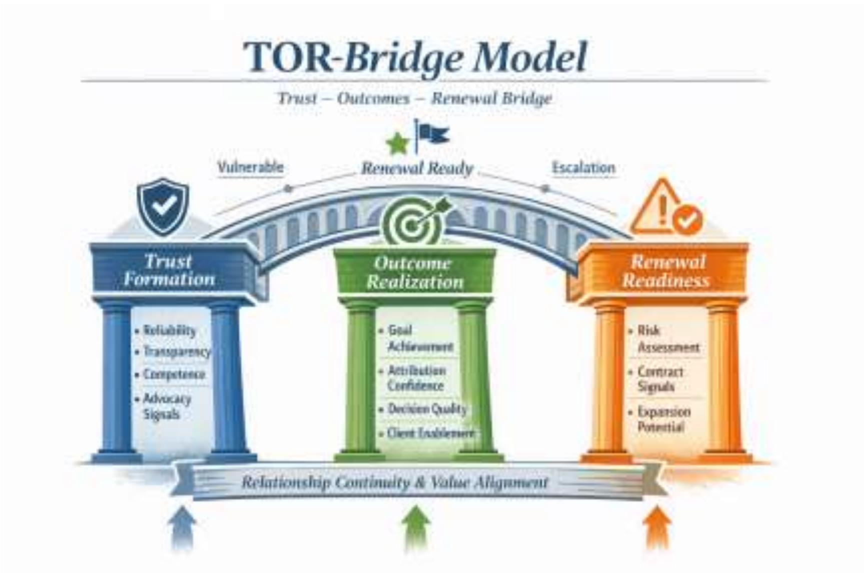
The empirical illustration uses a simulated portfolio dataset (n = 180 accounts) to demonstrate how the indices can be tested. The simulated renewal rate is 65.6%, consistent with portfolios where a mix of monthly retainers and project renewals is present. Across accounts, the Outcomes Index shows a moderate positive association with renewal (r = 0.36), while the Trust Index shows a smaller but meaningful association (r = 0.26). The transparency-related component shows a weak association (r = 0.10), suggesting that transparency is helpful but insufficient when trust and outcomes are weak.

A logistic regression model using Trust, Outcomes, and transparency discriminates renewed from non-renewed accounts with an AUC of 0.72. Interpreting coefficients as odds ratios, a 10-point increase in the Trust Index corresponds to approximately 1.92× higher odds of renewal, while a 10-point increase in the Outcomes Index corresponds to approximately 2.27× higher odds. The transparency component contributes marginally (1.17× per 10 points), which is consistent with the idea that transparency supports resilience but does not replace outcomes.

From an operational perspective, the model supports simple action rules that do not require advanced forecasting. Accounts with Trust Index ≥ 70 and Outcomes Index ≥ 65 show an 86.7% simulated renewal rate (n = 45), while accounts with Trust Index < 60 and Outcomes Index < 60 show a 10.0% simulated renewal rate (n = 10). This gap illustrates the value of a two-dimensional view: teams can distinguish “liked but ineffective” from “effective but distrusted,” and the corrective action differs. In the first case, the play is to strengthen value realization and decision quality; in the second, the play is to improve transparency, responsiveness, and expectation management.

Finally, the results show why a KPI system must integrate academic validity with managerial usability. Satisfaction and loyalty measures are valuable, but they become actionable when embedded into a cadence and tied to specific levers. This aligns with evidence that customer satisfaction and customer metrics have financial relevance and can be managed systematically (Fornell et al., 1996; Gupta & Zeithaml, 2006). Benchmark reports further suggest that consistent health scoring is less about perfect measurement and more about disciplined governance, escalation, and continuous learning (AgencyAnalytics, 2025; ChurnZero, 2024; Gainsight, 2025; Survicate, 2025; TSIA, 2025).

To translate the proposed KPI architecture into an actionable consulting framework, this study introduces the TOR-Bridge Model (Trust–Outcomes–Renewal Bridge). The model conceptualizes client retention not as a passive consequence of satisfactory service delivery, but as an actively governed process in which trust signals, outcome realization, and renewal readiness are continuously connected through a shared measurement logic. In practical terms, the model functions as a bridge between relationship health and commercial continuity, allowing consulting teams to identify renewal risk before it becomes visible in revenue loss or contract termination.



At the first stage, the model captures Trust Formation through observable relational indicators. This layer includes perceived reliability, transparency, competence confidence, and advocacy-related signals such as NPS. Its practical purpose is to quantify whether the client experiences the consultancy as dependable, understandable, and professionally credible. Rather than treating trust as an abstract relational asset, the model operationalizes it as a measurable condition that can be reviewed regularly and improved through communication quality, responsiveness, and expectation management. In this way, trust becomes the first pillar of retention resilience.

At the second stage, the model evaluates Outcome Realization. Here, retention is linked not only to reported satisfaction but also to whether the client can see and explain the value being created. This dimension includes progress toward agreed business goals, decision-quality discipline, attribution confidence, and client enablement. The logic of the model is that even a positive working relationship becomes fragile if outcomes are unclear, weakly documented, or disconnected from the client's strategic priorities. Therefore, the second pillar ensures that consulting performance is translated into visible and interpretable business value rather than remaining an internal delivery narrative.

At the third stage, the model creates a Renewal Bridge, where trust and outcomes are integrated with delivery hygiene and commercial risk signals into a Renewal Readiness assessment. This stage functions as the decision layer of the framework. It does not merely describe account health, but classifies whether the relationship is moving toward renewal, vulnerability, or escalation. In practice, this allows consulting firms to differentiate between accounts that are trusted but underperforming, accounts that perform but suffer from weak confidence, and accounts where both dimensions are strong enough to support renewal, expansion, and advocacy. The bridge metaphor is essential here: renewal is not treated as a final event, but as the cumulative crossing point built from repeated evidence of reliability and value.

The practical significance of the TOR-Bridge Model lies in its ability to connect academic constructs with managerial action. It converts service quality, trust, and value co-creation into a compact governance framework that can be reviewed monthly without advanced analytics infrastructure. More importantly, it provides a clear intervention logic: when trust is weak, the consultancy should improve transparency, communication, and responsiveness; when outcomes are weak, it should strengthen baselines, decision quality, and enablement; when both are strong, the focus can shift toward expansion and advocacy. Thus, the TOR-Bridge Model extends the article's contribution by offering a distinctive authorial mechanism for managing client retention in marketing consulting as a measurable, governable, and commercially consequential process.

DISCUSSION

The KPI system implies a shift in how marketing consultancies define "performance." Instead of treating delivery activity as proof of value, it treats value as the client's experienced combination of outcomes, confidence, and control. This shift is consistent with the commitment–trust logic: when trust is high, clients are more willing to tolerate uncertainty, collaborate, and invest in the relationship; when trust is low, even objectively good results can be reframed as luck or as unsustainable (Morgan & Hunt, 1994). Therefore, retention management is partly a measurement problem and partly a governance problem.

First, measurement must respect the asymmetry between consultant effort and client experience. Consulting teams often over-weight internal effort signals: number of deliverables, hours logged, or tool outputs. Yet service quality research shows that reliability and responsiveness shape perceived quality, and perceived quality shapes behavioral intentions (Parasuraman et al., 1988; Zeithaml et al., 1996). This is why delivery hygiene metrics matter. They are not vanity KPIs; they are the repeated evidence that a client uses to infer reliability.

Second, trust measurement should be explicitly multi-stakeholder. Many consulting relationships fail not because the day-to-day operator is unhappy, but because the sponsor lacks confidence, or because procurement perceives insufficient risk management. Professional service research suggests that relationships develop over time through cumulative evaluations and that different stakeholders may update their beliefs at different speeds (Karantinou & Hogg, 2009). In practice, this implies collecting trust signals from at least two roles per account and tracking divergence; divergence is itself a risk signal because it predicts internal misalignment during renewal negotiations.

Third, outcomes must be measured as value realization rather than as "marketing metrics." Outcome KPIs that are purely tactical (click-through rate, follower growth) can be fragile in renewal discussions because they are easily reinterpreted as activity metrics. By contrast, value realization links marketing execution to business objectives and includes a narrative of decision quality, which supports legitimacy when attribution is uncertain. This logic aligns with evidence that relationship quality in professional services is associated with loyalty intentions and that competence and communication shape that quality (Casidy & Nyadzayo, 2019).

Fourth, the framework highlights enablement as a retention lever that is often undervalued in marketing consulting. Training and capability transfer reduce information asymmetry and shift the client's perception from dependence to partnership. The empirical evidence that training clients in digital marketing can strengthen relationship quality offers a concrete operational implication: enablement should be treated as a measurable part of delivery, not as optional "extras" (Sutherland et al., 2025). A consultancy that routinely documents hypotheses, shares playbooks, and measures client learning is investing directly in renewal resilience.

Fifth, the model encourages consultancies to treat renewal as a process with leading indicators, not as a calendar event. Benchmarks in customer success repeatedly show that renewal success correlates with governance discipline: cadence, risk flags, and early executive alignment (Gainsight, 2025; TSIA, 2025). For agencies, benchmark data similarly suggests that consistent reporting and account management rituals correlate with longer relationships (AgencyAnalytics, 2025). A practical implication is to institutionalize a monthly "retention review" where indices are discussed, risks are named, and action owners are assigned, even when the account feels healthy.

Sixth, the literature on agency–client relationships warns against over-reliance on a single score. Reviews of agency–client research emphasize that performance evaluation is socially constructed, that expectations drift, and that contracts often become proxies for relational issues (Keegan et al., 2017). Applied work in communication agencies also highlights the importance of expectation management and relationship maintenance strategies that go beyond deliverables, such as proactive problem framing and consistent stakeholder engagement (Sutton et al., 2024). Therefore, the Renewal Readiness Index is best treated as a decision aid, supported by a short qualitative memo that captures contextual risks and stakeholder politics.

Seventh, the empirical illustration provides a useful pattern for analytics maturity. Even a simple logistic model can yield meaningful segmentation and action rules, and it remains interpretable for client-facing leaders. However, simulation results are not evidence of causality. Consultancies should treat the model as a template: collect data, validate predictive performance on historical renewals, and then iterate on weights. Over time, the model can be expanded to include commercial signals such as payment delays, scope volatility, and stakeholder turnover, provided that these are used ethically and transparently.

Finally, the framework clarifies what "improvement" looks like. Improvement is not increasing every metric; it is reducing uncertainty about relationship health and improving the team's ability to intervene early. When trust is weak, improvements should prioritize transparency, responsiveness, and decision clarity, because these are upstream of commitment (Sharma & Patterson, 1999). When outcomes are weak, improvements should prioritize value realization: tighter goal definitions, better experimentation, and clearer measurement baselines. When both are strong, the retention strategy shifts toward expansion and advocacy, where NPS-style measures become more informative for referrals and cross-sell (Reichheld, 2003; Survicate, 2025).

CONCLUSIONS

Client retention in marketing consulting depends on more than campaign performance. It depends on how clients experience reliability, how they understand decisions, and whether they can credibly connect consulting work to outcomes that matter. This article translates that reality into an implementable KPI system grounded in service quality and relationship marketing research. The proposed Trust Index, Outcomes Index, and Renewal Readiness Index provide a compact language for relationship health that can be monitored monthly and discussed in governance routines. The worked empirical illustration shows how even a simple predictive model can support early risk identification and action planning.

The main limitation is the absence of original field data collection; the empirical component is an illustration calibrated to prior evidence and to benchmark ranges. Future research should test the KPI system with real consulting portfolios across service lines and markets, examine measurement invariance across stakeholder roles, and compare alternative weighting schemes or non-linear models. Practitioners can implement the framework immediately by aligning outcome definitions at onboarding, running a brief monthly pulse for trust and renewal intent, and treating retention reviews as a normal part of delivery governance. In practice, the first win is visibility: teams stop guessing and start steering together.

REFERENCES

1. AgencyAnalytics. (2025). Marketing agency benchmarks report. AgencyAnalytics.
2. Casidy, R., & Nyadzayo, M. W. (2019). Drivers and outcomes of relationship quality with professional service firms: An SME owner-manager perspective. Industrial Marketing Management, 78, 27–42. doi:10.1016/j.indmarman.2017.09.011
3. Chih, W.-H., Wang, K.-Y., Hsu, L.-C., & Huang, S.-C. (2019). Enhancing value co-creation in professional service projects: The roles of professionals, clients and their effective interactions. International Journal of Project Management, 37(4), 599–615. doi:10.1016/j.ijproman.2019.04.001
4. ChurnZero. (2024). Customer success leadership study 2024. ChurnZero.
5. Dagger, T. S., Danaher, P. J., & Gibbs, B. J. (2009). How often versus how long: The interplay of contact frequency and relationship duration in customer-reported service relationship strength. Journal of Service Research, 11(4), 371–388. doi:10.1177/1094670508331251
6. Fornell, C., Johnson, M. D., Anderson, E. W., Cha, J., & Bryant, B. E. (1996). The American customer satisfaction index: Nature, purpose, and findings. Journal of Marketing, 60(4), 7–18. doi:10.1177/002224299606000403
7. Gainsight. (2025). Customer success index 2025. Gainsight.
8. Gupta, S., & Zeithaml, V. (2006). Customer metrics and their impact on financial performance. Marketing Science, 25(6), 718–739. doi:10.1287/mksc.1060.0221
9. Karantinou, K., & Hogg, M. K. (2009). An empirical investigation of relationship development in professional business services. Journal of Services Marketing, 23(4), 249–260. doi:10.1108/08876040910965582
10. Keegan, B. J., Rowley, J., & Tonge, J. (2017). Marketing agency–client relationships: Towards a research agenda. European Journal of Marketing, 51(7/8), 1400–1427. doi:10.1108/EJM-10-2015-0712

11. Lassila, E., Heikka, E.-L., & Nätti, S. (2023). Supporting value co-creation through interaction during the pre-purchase customer journey: Empirical evidence from B2B HR services. Journal of Business & Industrial Marketing, 38(13), 63–73. doi:10.1108/JBIM-12-2021-0552
12. Morgan, R. M., & Hunt, S. D. (1994). The commitment-trust theory of relationship marketing. Journal of Marketing, 58(3), 20–38. doi:10.1177/002224299405800302
13. Parasuraman, A., Zeithaml, V. A., & Berry, L. L. (1988). SERVQUAL: A multiple-item scale for measuring consumer perceptions of service quality. Journal of Retailing, 64(1), 12–40.
14. Reichheld, F. F. (2003, December). The one number you need to grow. Harvard Business Review, 81(12), 46–54.
15. Sharma, N., & Patterson, P. G. (1999). The impact of communication effectiveness and service quality on relationship commitment in consumer, professional services. Journal of Services Marketing, 13(2), 151–170. doi:10.1108/08876049910266059
16. Survicate. (2025). NPS benchmarks 2025: What is a good net promoter score? Survicate.
17. Sutherland, K., Mulcahy, R., Burgess, J., & Lawley, M. (2025). Training clients in digital marketing: The key to a feel-good B2B relationship with SMEs. Industrial Marketing Management, 127, 148–163. doi:10.1016/j.indmarman.2025.05.002
18. Sutton, L. B., Kloppers, E. M., & Bezuidenhout, L. (2024). Strategies utilised by communication agencies to build and maintain relationships with clients. Southern African Journal of Entrepreneurship and Small Business Management, 16(1), a825. doi:10.4102/sajesbm.v16i1.825
19. Technology & Services Industry Association. (2025). State of customer growth and renewal 2025. TSIA.
20. Zeithaml, V. A., Berry, L. L., & Parasuraman, A. (1996). The behavioral consequences of service quality. Journal of Marketing, 60(2), 31–46. doi:10.1177/002224299606000203