

The Retainer Kit — The Guide

How to sell, price, and run retainers as the technical partner to your client's marketing team. Care plans beyond WordPress.

Before you start

I run a web studio in southern Brazil. About 60% of our clients are on a monthly retainer; the other 40% are one-off projects. That split is why the studio is stable. Project revenue arrives in lumps. Retainer revenue arrives on the first of the month and covers fixed costs before we close a new deal. Nothing in this model depends on where we are. It works the same with a client in Ohio.

For years we called it "maintenance." In the sales conversation, that was a mistake. Nobody gets excited about plugin updates, and the person who signs off on a maintenance plan sees it as insurance: something to cut when budgets get tight. The retainers that last are the ones where we work as the **technical partner to the client's marketing team**. The marketing manager needs a landing page this week, a form wired into the CRM, a pixel that actually fires, an A/B test on the pricing page. Our hours serve those campaigns. Updates, security, backups and uptime are still included, but they are the base of the plan, not the pitch.

This guide is the operating model we use. It is not WordPress-only. Our own work is on WordPress and on Next.js with a headless CMS. The model is built around **hours and boundaries**, not plugin updates, so it fits Webflow and Framer sites just as well. Where this guide mentions those two platforms, it describes how the model applies to them; it doesn't claim we build on them every day.

What's here:

1. Who buys a retainer (it's the marketing manager)
2. Do it once, record a video, they do it next time
3. What the hours look like: three typical requests, annotated
4. Scope: what's in, what's out
5. Pricing your hour from the bottom up (worked example)
6. Packaging the plans
7. Rollover hours are work you owe
8. Response times: pick the SLA you can actually keep
9. Contract terms
10. Onboarding
11. Monthly reporting for a marketing audience
12. Objections
13. Scope creep
14. The usage review and renewal

The templates in the kit (proposal, agreement, scope matrix, change request, monthly report, emails) map to these sections. Read the guide once, then work from the templates.

— Mateus, founder of a web studio in southern Brazil

5. Pricing: build your hourly rate from the bottom up

Most freelancers pick a rate by looking at what others charge. That tells you what the market tolerates, not whether *your* business makes money at that rate. Start from your costs, then check against the market.

The method

$$\text{Hourly rate} = (\text{Fixed monthly costs} + \text{Target profit}) \div \text{Billable hours available per month}$$

Fixed monthly costs are everything you pay whether or not you have work: rent or coworking, utilities, internet, software, servers you carry, equipment, accounting, insurance, and **team pay, including your own salary**. Leave your own pay out and you're pricing a hobby.

Target profit is a margin on top of costs. It builds a cushion, pays for investment, and gets you through a slow quarter.

Billable hours available is the honest number, not 160 hours per person. Subtract admin, sales, meetings, learning and context switching. For most small studios, 50–65% of working hours are realistically billable.

Worked example (hypothetical numbers)

These numbers are made up for illustration. The pricing calculator (06) starts with them; replace them with yours.

A two-person studio:

Fixed monthly cost	Amount
Salaries (owner + 1 developer), incl. payroll taxes	\$11,500
Coworking space	\$700
Software and subscriptions	\$450
Servers/tools not billed to clients	\$250
Accounting, insurance, bank fees	\$500
Equipment amortization, internet, misc.	\$600
Total fixed costs	\$14,000

Target profit: **30%** on top of costs → $\$14,000 \times 1.30 = \$18,200$

Billable hours: 2 people × ~160 working hours × ~59% billable ≈ **190 hours/month**

Hourly rate: $\$18,200 \div 190 \approx \$95.79$ → round to **\$96/hour**.

Now check the market. If similar studios charge \$85–150, you're in range. If your cost-based rate is above what your market pays, don't drop the rate and lose money. Cut costs, raise utilization, or move to a segment that pays more. Selling to marketing teams is often that move.

The section continues with the overage rate (1.25x by default, 1.5x as the alternative) and infrastructure pricing.