

MAKE YOUR CLIENTS *Love You*



Checklist

Copyright Notice

Copyright © NAMS, Inc. All rights reserved worldwide.

No part of this material may be used, reproduced, distributed or transmitted in any form and by any means whatsoever, including without limitation photocopying, recording or other electronic or mechanical methods or by any information storage and retrieval system, without the prior written permission from the author, except for brief excerpts in a review.

This material is intended to provide general information only. Neither the author nor the publisher gives any legal or other professional advice. If you need expert advice, you should seek advice from the appropriate licensed professional. This material does not provide complete information on the subject matter covered. This material does not intend to address specific requirements, either for an individual or an organization.

This material is intended to be used only as a general guide and not as a sole source of information on the subject matter. While the author has undertaken diligent efforts to ensure accuracy, there is no guarantee of accuracy or no errors, omissions, or typographical errors. Any slights of people or organizations are unintentional.

Any reference to any person or organization, whether living or dead, is purely coincidental. The author and publisher shall have no liability or responsibility to any person or entity. We disclaim all liability, including without limitation, liability for consequential damages regarding any claim, loss, or damage that may be incurred, or alleged to have been incurred, directly or indirectly, arising out of the information provided in this material.

Table of Contents

Checklist3

Checklist

- ☐ I understand that relationship marketing is a never-ending process that I need to embrace if I want my business to grow.
- ☐ I understand that keeping my clients happy will make them loyal to my business.
- ☐ I understand that creating client loyalty doesn't happen overnight.
- ☐ I understand that I should implement these ideas at a pace that works for me.
- ☐ I understand that I should be creative and customize these tips to reflect my business style and to suit my clients.
- ☐ I understand that my relationships with my clients are much like a marriage. There's give and take from both sides as well as open communication.
- ☐ I understand that all client relationships begin with the "know, like, and trust" phase.
- ☐ I understand that happy clients become loyal clients who then become word-of-mouth ambassadors for my business.
- ☐ I understand that happy and loyal clients can open the doors to joint venture projects and an influx of more customers, all because they are satisfied with my advice and their outcomes.
- ☐ I understand that planning and consistency in utilizing these tips are what will endear clients over time.

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ I understand that my clients are human beings, not dollar signs, and they all deserve my best work.
- ☐ I understand that my clients want to form a genuine connection with me.
- ☐ I understand that my clients enjoy hearing praise from me in these ways:
- ☐ I am thanking them for their business, for their testimonials, or for any referrals they send my way.
- ☐ Praising them for being action-takers and for being diligent, hardworking, patient, and thoughtful.
- ☐ Praising and celebrating when they reach a significant milestone in their business.
- ☐ Closing our coaching sessions with validation and positive thoughts.
- ☐ I understand that I should use my creativity to think of other ways to praise or validate my clients and their work.
- ☐ I understand that I should always be authentic with my praise, or my clients will see me as fake.
- ☐ I understand that my praise and compliments should stay business-related instead of personal so as not to cause discomfort or an awkward situation.
- ☐ I understand that I can personalize my client relationship by keeping careful notes about their business or family.
- ☐ I understand that knowing a client's birthday, anniversary, or children's names can make our relationship more intimate and friendly.

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ I understand that not all my clients will want to share information, but I can pay attention to what they share on social media and add that information to my notes.
- ☐ I understand that careful record-keeping is vital to keep my client information safe.
- ☐ I understand that I can keep my clients' details organized in the following ways:
 - ☐ A simple Excel spreadsheet
 - ☐ A CRM system
 - ☐ Sent Out Cards
- ☐ I understand that I can use this personal information to send my clients:
 - ☐ Birthday, anniversary, or holiday cards
 - ☐ A thoughtful gift
 - ☐ A celebratory gift when they reach a milestone
- ☐ I understand that sending a physical gift through the mail is a creative way to say thank you or to celebrate my clients.
- ☐ I understand that I can create my thoughtful gift or use some of these ideas:
 - ☐ A welcome gift for new clients, such as a journal, cupcakes, brownies, wine, etc. means a lot.
 - ☐ A welcome kit explaining your business policies

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ Holiday gifts, such as cards, gift baskets, or gifts from my client's favorite store
- ☐ Flowers for any occasion
- ☐ An autographed copy of your newest book
- ☐ Branded gifts with your logo or brand colors
- ☐ Gifts that reflect your business values
- ☐ A limited-time discount on one of your products or programs
- ☐ A charitable donation in their name
- ☐ I understand that I should set a budget for my gifts or select certain VIP clients to receive gifts.
- ☐ I understand that my clients want to feel valued and want to participate in creating their action plans actively.
- ☐ I understand that these following ideas will make my clients feel valued:
- ☐ Ask open-ended questions to start conversations
- ☐ Ask about their goals
- ☐ Use the SMART guidelines to set goals
- ☐ Listen to what they say

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ Send an email summary of coaching notes at the end of each session
- ☐ Revisit their goals periodically in case they have changed
- ☐ Add or delete any plans or goals as they discuss, so the action plan is always up to date.
- ☐ Offer a free upgrade to their service
- ☐ Interact with them via social media or at local networking events
- ☐ Give shout outs to celebrate milestones (provided they don't want to keep our relationship confidential)
- ☐ Invite clients to local meetups or networking events
- ☐ Frequent my client's business or send referrals
- ☐ Support my clients during difficult challenges, illnesses, or losses
- ☐ I understand that sending recorded messages can be a fun way to stay in contact with my clients in between our coaching sessions.
- ☐ I understand the reasons for being creative with my messages:
- ☐ Emails and texts can get lost
- ☐ Social media messages (Facebook or LinkedIn) are instantly recognized
- ☐ There are fewer distractions when people listen or watch a social media message

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ Clients often respond faster to social media messages
- ☐ Recorded messages are more personal than emails
- ☐ Fewer misunderstandings about the sender's tone
- ☐ Less time wasted with small talk
- ☐ I understand that video messages are an easy way to demonstrate something to clients or team members
- ☐ I understand there are different inexpensive tools I can use to record messages:
 - ☐ My smartphone's built-in recording apps
 - ☐ Voxer app
- ☐ I understand that embracing team spirit is a positive way to make my clients feel like a part of the family.
- ☐ I understand that my team members should also embrace a team spirit to help productivity and morale.
- ☐ I understand that some people/team members have an innate team spirit, which shows up in their strong work ethic.
- ☐ I understand that I may need to mentor and teach some team members to be proud of their work and to put my clients' needs first.

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ I understand that a positive team spirit will put clients at ease, so they have confidence that we can help them achieve their goals.
- ☐ I understand that even though I am not completing my clients' action steps, my job is to guide them through any problems and to foresee other challenges.
- ☐ I understand that I should care just as much about my client's success as they do.
- ☐ I understand that happy clients and team members will be more vocal in meetings and glad to do the work, thus improving productivity.
- ☐ I understand that some clients will need extra hand-holding than other go-getter clients.
- ☐ I understand that excellent communication skills and openly discussing my expectations are a necessity with both clients and team members.
- ☐ I understand that using "we" statements is more welcoming than "you" statements, which can sound like you're placing blame.
- ☐ I understand that talking about shared goals with my clients and team members will help build team spirit.
- ☐ I understand that paying my team members a competitive wage will keep their morale high and will build loyalty.
- ☐ I understand that I should charge a competitive price to my clients, so they don't question why I'm undervaluing my services.
- ☐ I understand that relationship marketing includes being a connector between my clients and my network.

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ I understand these are some ways I can be a connector:
- ☐ Make introductions for my clients when they ask
- ☐ Recommend clients to other colleagues who need their help
- ☐ I understand that I should be careful when referring my clients to my networking contacts because if they exhibit bad networking behavior, it will reflect poorly on me.
- ☐ I understand that I should review my networking practices before advising my clients on how to network:
- ☐ Make friends, not contacts
- ☐ Friends do business with friends
- ☐ Listen to what your clients or social followers need
- ☐ Be bold and tell your story
- ☐ Don't be a pitching machine
- ☐ Don't spam; ask for introductions instead
- ☐ Ask how you can help this person
- ☐ Know your audience
- ☐ Choose your social networks wisely

MAKE YOUR CLIENTS LOVE YOU CHECKLIST

- ☐ Have a plan and goals for posting
- ☐ I understand that implementing these ideas is like a marathon, not a sprint. It's OK to take my time so long as I start with at least one of these tips right away.