

# MAKE YOUR CLIENTS *Love You*



## Workbook

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## Introduction

Use this printer-friendly and digital fillable workbook to plan your client loyalty process.

### Review Your Client Care Process

How do you make your clients feel special?

How do you make their experience outstanding?

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Do any of these things make your client feel special?

Do your clients spend money on any of your other products or programs?

Make a list of all the ways you currently make your clients feel special.

Think about your own experiences:

What types of things have small businesses or other companies made you take notice?

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How did those actions/programs make you feel as a customer?

Would you frequent that company again?

Would you or did you tell friends about your experience?

Write some ideas you have seen for rewarding customers you could do for your clients and customers.

## Shower Your Clients with Genuine Praise

How do you thank your clients? What changes can you make?

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How do you encourage your clients? What changes can you make?

How do you celebrate your clients' business milestones? What changes can you make?

Do you close your coaching sessions on a positive note? What changes can you make?

## Keep Careful Tabs on Their Details

Do you know anything about your clients other than their email address, their website, and where they live?

Gather client information (or delegate to your VA):

Search their website for interesting tidbits (such as hobbies, travel, etc.)

Search their social media posts (hobbies, travel, etc.)

Send a personal email asking them to share information about themselves. What will you ask?



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Research ways to keep client data organized and safe, such as a spreadsheet or CRM platforms:

Pros:

Cons:

Which of your clients' milestones do you want to celebrate?

How can you automate or delegate this work?

## Show You Care with a Thoughtful Gift

Brainstorm gift ideas suitable for a client based on the list of personal and business milestones you want to celebrate.

Welcome gift ideas and budget.

Holiday ideas and budget.

Choose a florist if you prefer to send flowers for any occasion. List the name, number and website information.

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Research branded gifts with your logo or branding colors. Document website and other details to refer back to.

Do you want to offer a discount on one of your other products? Make it time sensitive with an expiration date. Make a recommendation about which product will suit them best.

Set your monthly or annual gift budget. Prioritize your gifts.

Prioritize your clients (active versus non-active).

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How much can you afford to spend?

Create a Welcome Kit for new clients. Include:

- Welcome letter
- Your bio
- Business hours
- Business policies/practices
- Other products or programs you sell
- Contact information

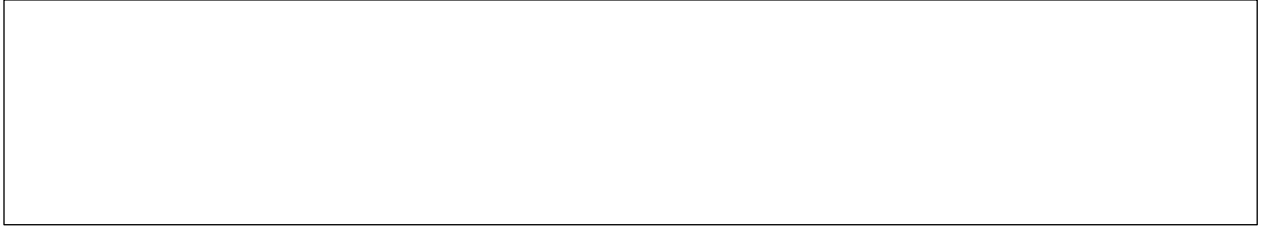
## Make Your Clients Feel Valued

Brainstorm ways you can ask your clients for more input and get them more involved in their action plans.

Review the SMART guidelines for goal setting so you can help your clients better.

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Practice ways to develop better listening skills.

A large, empty rectangular box with a thin black border, intended for writing or drawing to practice listening skills.

Explore ways to improve your note taking so you can send email summaries after each session.

A large, empty rectangular box with a thin black border, intended for writing or drawing to explore ways to improve note taking.

Set a timetable for asking clients for feedback. This will likely differ for each client but use this as a timetable guide.

A large, empty rectangular box with a thin black border, intended for writing or drawing to set a timetable for asking clients for feedback.

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Brainstorm ways to upgrade your clients' services.

Research if your clients offer any products or services that you can use.

Brainstorm ways you can support clients during difficult times of loss or illness.

## Go the Extra Mile with a Recorded Message

Plan how you will use recorded messages with your clients.

Choose audio, video, or a mix of both.

Research tools and apps for recording.

Find the perfect recording space that is quiet and has enough light. Choose how you will deliver these messages.

<ul style="list-style-type: none"><li>• Messenger App</li><li>• Voxer</li></ul>	<ul style="list-style-type: none"><li>• Facebook</li><li>• LinkedIn</li></ul>	<ul style="list-style-type: none"><li>• Text</li></ul>
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## Embrace Team Spirit

Brainstorm ways you can be more of a cheerleader to your clients.

Brainstorm ways to create team spirit with your own team members.

Evaluate your team members for team spirit.

Who has a strong work ethic?

Who needs mentoring?

Evaluate your clients.



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Who has a positive outlook and go-getting attitude?

Who needs a little more handholding?

How can you use more 'we' statements?

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Talk about shared goals with your team and with clients.

Review your team's wages. Are they competitive?

## Be a Connector

Review your clients' businesses.

Is there anyone you can refer to them?

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Are there introductions you have been asked to make? Have you followed through on those?

Review your networking best policies.

How can you improve your own networking practices?

How can you help your clients improve their networking practices?

Begin with one step at a time and develop your client/customer loyalty program using the ideas in this workbook. A happy client is a loyal client. A loyal client will sing your praises to everyone. That can lead to new prospects and clients.