

MAKE YOUR CLIENTS *Love You*



Calendar

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MAKE YOUR CLIENTS LOVE YOU CALENDAR

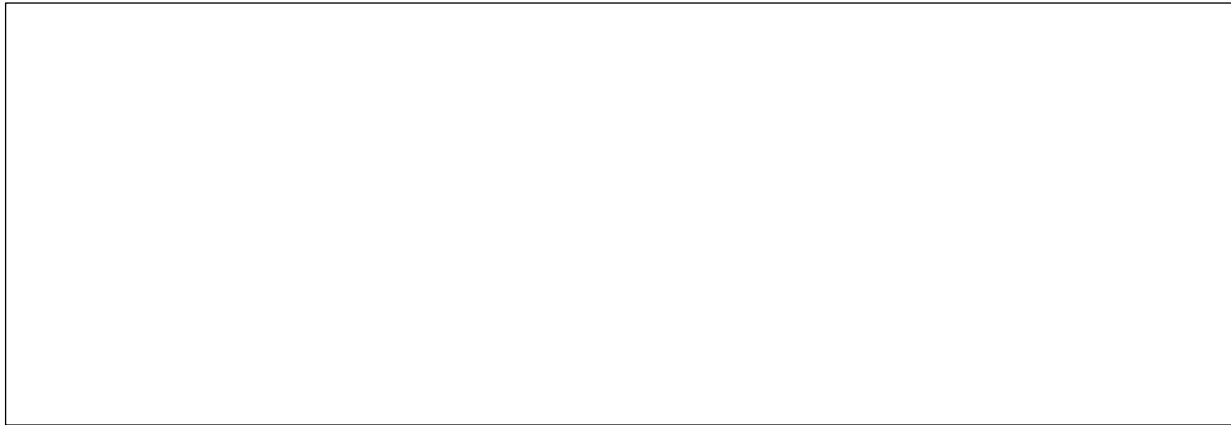
Use this calendar to keep you on track of making your clients love you! It is printer friendly and fillable on your computer.

Week 1

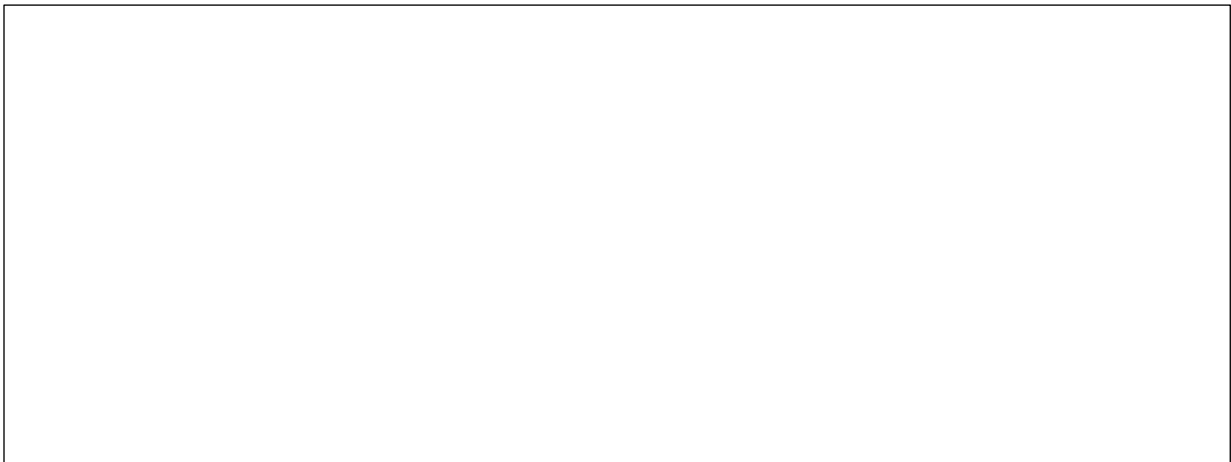
Monday

Review your workbook and continue to complete it.

Review your current processes for keeping clients happy.



Review your processes for getting prospects to know, like and trust you.



Tuesday

How do you currently praise your clients and customers?

Brainstorm new ways you can genuinely praise your clients and customers:

Wednesday

If you are stuck on ways to praise your clients, here are some ideas:

- Add 'thank you for your business' on invoices,
- Send thank you notes for hiring you,
- Close coaching sessions with positive reinforcement.
- Think of ways to praise and validate clients who are real action-takers.
- Congratulate clients when they reach a milestone.

Delegate tasks to your VA, as needed.

Thursday

Review your current processes for keeping client data organized.

Research other, better ways to organize client data.

Delegate this task to your VA.

Friday

Review your week. What did you not complete?

Document and schedule on next week's schedule the tasks you did not complete this past week.

Week 2

Monday

Choose a new way to organize your client data OR update your current process.

If using a new system, have your VA transfer all of your client data to the new system.

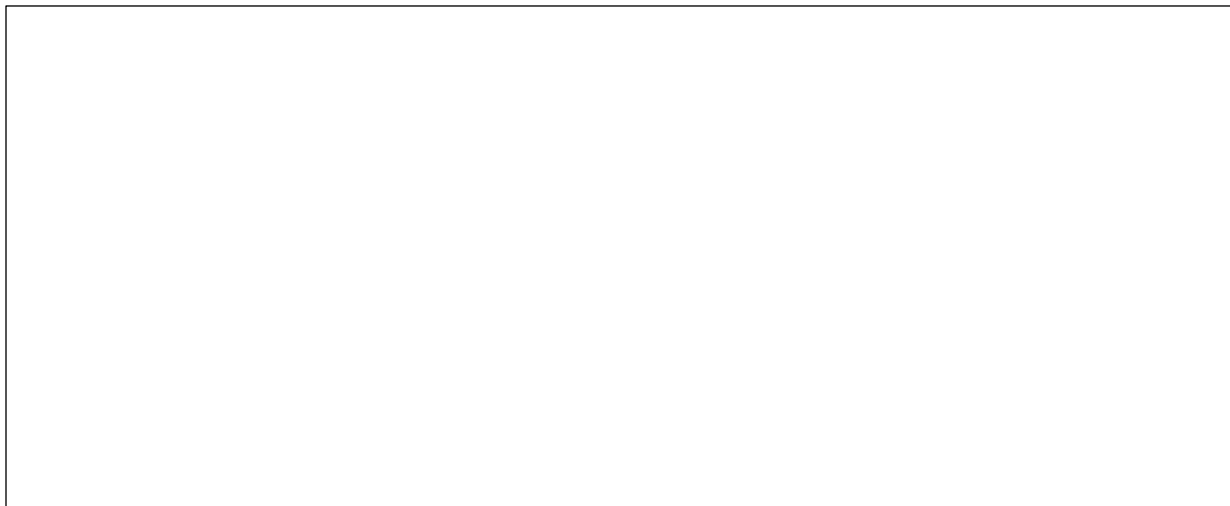
Document how the new system works in case your VA is not available to maintain the process.

Tuesday

Review your current process for sending gifts to clients.

Set a budget for client gifts.

Decide when you will send gifts.



Wednesday

Ask your VA to research different types of gifts within your budget.

Determine if ALL clients will receive these gifts or just VIP clients.

Ask your VA to create an online calendar or set up a reminder system to send out gifts every month.

Ask your VA to document the process.

Thursday

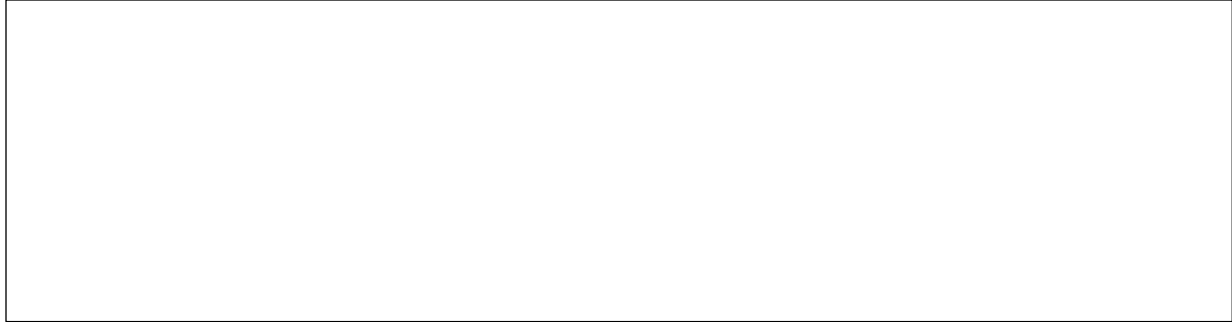
Ask your VA to routinely research gift ideas that relate specifically to your client's home state, favorite hobby, favorite store, etc.

Make sure you VA documents the process for you.

Friday

Review your week. What did you not complete?

Document and schedule on next week's schedule the tasks you did not complete this past week.



Review your upcoming schedule.

Week 3

Monday

Research gifts that can be customized with your logo and/or business colors.



Do these gift ideas fit in your budget?

Check to see if there is a bulk discount rate available.

Tuesday

Review your current client onboarding process.

Are your clients included in the initial planning phase or are you dictating the steps they should complete?

Update any onboarding surveys or paperwork with the open-ended questions for clients to give their input. Document the change(s) below.

Update your onboarding workflow and document it.

Wednesday

Review your clients' goals. What needs to covered in their next session?

Thursday

Review how you currently take notes during coaching sessions. Is it working or do you need another process?

MAKE YOUR CLIENTS LOVE YOU CALENDAR

Get in the habit of emailing summaries after each session so clients know their next steps. Create templates for these.

Friday

Review your week. What did you not complete? Can you have your VA do it?

Document and schedule on next week's schedule the tasks you did not complete this past week.

Review your upcoming schedule.

Week 4

Monday

Review your process for communicating with your clients in between client sessions.



Start conversations on social media.

Send recorded messages to inspire them during the week. Create that voice message script below.



Tuesday

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

Explore the recording capabilities of your smartphone. Research the Voxer app.

Wednesday

Think about how you currently embrace team spirit.

How do you welcome new clients?

Does your VA and/or any other team member display a sense of pride working with you?

Brainstorm ways you can amp up the morale of your team and your clients.

Thursday

Review your connections of LinkedIn and other social media platforms.

Would any of your clients benefit from an introduction?

Review best practices for business networking, including social media.

Friday

Review your week. What did you not complete and why?

Document and schedule on next week's schedule the tasks you did not complete this past week.

Review your upcoming schedule.

Declutter and update your office, hardware, equipment, etc.

NOTES: