

CLIENT RETENTION PLAYBOOK

STEP 1: ONBOARD CLIENTS LIKE A VIP

- FIRST IMPRESSIONS MATTER. START YOUR RELATIONSHIP WITH WARMTH, PROFESSIONALISM, AND ATTENTION TO DETAIL.
- SEND A WELCOME PACKET, EMAIL OR PERSONALIZED THANK-YOU GIFT TO NEW CLIENTS.
- ENSURE THEY KNOW HOW TO ACCESS YOUR SERVICES AND WHO TO REACH OUT TO FOR QUESTIONS OR SUPPORT.

STEP 2: CREATE CONSISTENT TOUCHPOINTS

- SEND REGULAR FOLLOW-UP EMAILS OR TEXTS TO CHECK IN ON CLIENT SATISFACTION.
- USE AUTOMATED REMINDERS OR NEWSLETTERS TO STAY TOP OF MIND.
- PROVIDE VALUABLE INSIGHTS OR TIPS RELATED TO THEIR NEEDS.

STEP 3: PROVIDE AN EXCEPTIONAL EXPERIENCE

- EXCEED EXPECTATIONS BY GOING ABOVE AND BEYOND IN SERVICE.
- OFFER SURPRISE BONUSES OR FREE CONSULTATIONS FOR LOYAL CLIENTS.
- DEVELOP A CLIENT LOYALTY PROGRAM (E.G., DISCOUNTS FOR REPEAT BUSINESS, REFERRAL BONUSES).

STEP 4: GATHER CLIENT FEEDBACK & ACT ON IT

- USE SURVEYS OR DIRECT OUTREACH TO ASK CLIENTS HOW YOU CAN IMPROVE.
- ACT ON FEEDBACK TO IMPROVE YOUR SERVICES—CLIENTS WILL APPRECIATE YOUR EFFORTS TO MEET THEIR NEEDS.
- TURN COMPLAINTS INTO OPPORTUNITIES TO SHOW YOU CARE AND MAKE IT RIGHT.

STEP 5: TURN CLIENTS INTO RAVING FANS

- CREATE A VIP EXPERIENCE FOR YOUR MOST LOYAL CLIENTS (EXCLUSIVE DEALS, BEHIND-THE-SCENES ACCESS, EARLY ACCESS TO NEW SERVICES).
- USE CLIENT TESTIMONIALS AND CASE STUDIES TO SHOWCASE THEIR SUCCESS STORIES.
- IMPLEMENT A REFERRAL PROGRAM TO ENCOURAGE CLIENTS TO SEND NEW LEADS YOUR WAY.

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STEP 6: CREATE A CLIENT APPRECIATION STRATEGY

- REGULARLY ACKNOWLEDGE YOUR CLIENTS WITH THANK-YOU CARDS, BIRTHDAY GIFTS, OR SURPRISE TREATS.
- CELEBRATE MILESTONES (ANNIVERSARIES, NEW LAUNCHES, ETC.) TO KEEP THE RELATIONSHIP WARM AND PERSONAL.
- HOST CLIENT APPRECIATION EVENTS—VIRTUAL OR IN-PERSON—TO FOSTER DEEPER CONNECTIONS.

RAVING FANS TIP: CLIFFTON MUCKENFUSS, THE VISIONARY OWNER BEHIND BUILDING RAVING FANS, "THE GRATITUDE COMPANY," EMPHASIZES THE IMPORTANCE OF TURNING YOUR CLIENTS INTO LIFELONG ADVOCATES. CHECK OUT HIS WEBSITE AT WWW.BUILDINGRAVINGFANS.COM FOR MORE INSIGHTS ON HOW TO BUILD A CUSTOMER LOYALTY PROGRAM THAT REALLY WORKS! BUY YOUR TIME BACK BY HAVING BUILDING RAVING FANS AUTOMATE THIS PROCESS FOR YOU.