

Checklist Client Retention Strategies



Yvonne A Jones

CHECKLIST

Client Retention Strategies



Connections, Client Loyalty and Cash Flow

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“Every contact we have with a customer influences whether or not they’ll come back. We have to be great every time or we’ll lose them.” – Kevin Stirtz

There are many areas that you can connect with your clients and customers. In the day to day challenges, it’s easy to forget to do something and your good intentions fall by the wayside.

This handy Checklist is intended to be a reminder you can keep on your desk of some of the things you should be doing on a regular basis in order to retain your clients and customers.

I encourage you to go through the list and create a simple system where you decide what things will be done daily, weekly, monthly, and beyond.

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- I understand that delivering on what I promise is the lowest level of service I should consider acceptable
- I understand that perks and bonus gifts delight people and increase the loyalty factor because they:
 - Give recognition
 - Feel like rewards
 - Magnify their already positive experience with you
 - Let people know they are appreciated
 - Reassure them that you care about them
 - Tell them they are special
 - Make them feel exclusive
- I am planning to include perks and bonus gifts that are tangible as well as intangible (such as your time)
- I plan to surprise my customers and members with unannounced bonuses
- I am making sure my bonuses are:
 - Something they would gladly pay for
 - Something they perceive as high value
- I am considering creating bonuses and gifts such:
 - A 15- or 30-minute individual brainstorming session
 - A critique of your member's website, book cover, or other created content
 - A live Q&A webinar every week
 - Other _____
- I am also considering providing valuable extras that others have to pay for like:
 - A free ticket to my next live event
 - Access to my archives
 - Free access to a related course I have already created
 - Other _____

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- I am considering actual physical gift items such as:
 - A hard copy of my book
 - A luxurious “present” (example: a writing coach might offer a writing-themed tote bag and scarf)
 - Small physical aids such as journals, mini-notebooks and branded Post-it Notes
 - Other _____
- I am also considering adding gifts from other experts
- I understand I can present these strategically in ways such as the following:
 - An incentive to purchase
 - An unannounced bonus
 - A perk after purchase
 - A value-added email follow-up
 - Other _____
- I am considering adding program updates
- I understand that it is to my advantage to keep my products and programs cutting edge
- I understand program updates can also be used as an incentive to buy
- I am making sure my customers and members fully understand the value of what I am giving them
- I am making sure I do my homework and assign a truthful value—not a guesstimated or spur-of-the-moment figure
- When estimating my product or program value, I am using provable criteria such as:
 - Current market value from competitors
 - My regular price for a product I’m including for free
 - What I normally charge per hour

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- I understand that one or two gifts of high perceived value are far more effective than an overload of gifts of lower perceived value
- I am ensuring I acknowledge my valued customers and members with:
 - Recognition
 - Shout outs
 - Interviews
 - Acknowledgement
 - Praise for achievements or milestones
 - Answers to their questions
 - Thanks for their comments and suggestions
 - Other _____
- I am appreciating my existing members by:
 - Offering special discounts for multiple purchases or upgrades
 - Teaming with a JV partner to offer reciprocal discounts on each other's complementing product, package or course
 - Offering special "early renewal" rates
 - Offering automatic "lifetime membership" conversions after they have paid into my membership site for the duration of its natural life cycle
- I am identifying what my customers and members love most about my products and membership site and giving them more of it
- I am avoiding cheapening words like "discount" and using more positive terms such as "special price"
- I am making it easier, both emotionally and physically, to renew memberships than to cancel
- I am actively listening to my customers and members and creating products and programs they will really love.

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WHO IS YVONNE A JONES?

Yvonne A Jones is a Personal Business Coach/Relationship Marketing Strategist who works with highly motivated entrepreneurs and professionals 50 and Wiser, who are frustrated with their results.

She helps them eliminate limiting beliefs so they feel motivated, inspired, and empowered to create a business they love and have FUN doing so.

Yvonne has been coached by some of the best coaches online, and she wants you to experience the power of coaching to achieve your vision and goals.

Each month she carves out five hours for complimentary **1:1 coaching sessions where she focuses on your goals for one hour.**

If you'd like to claim a "Double Your Results" Coaching Session, send an email to: Yvonne [@] YvonneAJones.com and let her know you'd like to secure your spot, or go ahead and select a time on her scheduler.

Claim your copy of "Relationship Marketing: Key to Small Business Success" at

<https://50andwisercoaching.com/smallbizsuccess>

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ARE We Connected on Social Media?

<https://www.linkedin.com/in/yvonneajones>

<https://twitter.com/YvonneAJones>

<https://www.instagram.com/YvonneAJones/>

<https://www.facebook.com/yvonneajones>

<https://www.facebook.com/50andwisermentoring/>

<https://www.facebook.com/SocialMediaandCustomerService>