

## QUICK TIPS SERIES, Session 3, Creating Conversations

# Grow Your Flow: Loyalty & Revenue

If you watched/downloaded the content from **Session 2, Foundations**, you started the process of segmentation. Segments fuel personalization, and conversation. You probably don't talk to your mom, wife and best client the same way, right? As a small business, you're used to having one-on-one interactions; it gets trickier to keep them going with hundreds or thousands of clients.

Note: here we're looking only at your current clients. Your prospect list can benefit too, so you attract more NEW ideal clients, but that's a topic for another day.

### Creating Your Segments

Since this list is 100% clients, you already have some meaty information: what they've purchased, what they haven't purchased but you think they could or should, their location (if that's a factor that matters to you), their business type (again, if that matters).

To start, gather one more layer of information about their needs. This will help you find out how to deliver value and relevance.

1. Start by choosing one of these 3 questions:
  - What's your biggest goal?
  - What's your biggest gap?
  - What's your biggest challenge?
2. Create 2-4 possible answers for them to choose from. Each of these will become a segment. The answers should match solutions you currently offer. You could also include one you're thinking of offering. *(See next page for examples.)*  
**Don't ask more than that—too many choices can paralyze people!**
3. Here are two ways to gather the details so you can assign clients to segments:
  - a. Gather their answers by sending out a simple email survey. Active clients are more likely to answer than inactive. *Note: many won't answer, especially the first time, so if you have a small list, you might want to follow up by phone, in person, text or even social media.*
  - b. Send out content related to each answer, and infer which matters most by looking at the content they reply to or click on. This takes a little more time and attention, but is very helpful especially as you grow.
4. Assign clients to segments based on their answer: so all clients that chose your 1<sup>st</sup> answer go in one list, all that chose the 2<sup>nd</sup> answer go in another list, etc.

Here's an example: I might ask my clients to tell me their biggest goal:

- A. Get rid of the peaks and valleys in revenue flow (consistency)
- B. Increase time for creating new service and products (time freedom)
- C. Increase the number of clients who re-book or upgrade by 15% (repeat revenue)

Knowing the answers to this question is like opening an oyster shell and finding a pearl!

Now that I know which goal they resonate with most, I can use language, find topics, and develop content, products and services that zero in on their goal.

### **Creating Conversations by Segment**

There are many ways to use your segmentation insights. Some thought starters:

- In meetings, calls, presentations, and your direct contact, tailor the language you use, examples and benefits with their specified need in mind.
- Look at ways to help them stay focused on and believe in their vision. What information or tools can you share? What we focus on expands, right?
- How can you use what you've learned to influence your social media content—including asking them additional questions!
- Create audits—either free or paid—to help them get more sophisticated or successful. Once you know what a client's main want or need is, you have both more knowledge and more trust to build on your relationship. Audits are often a way to dive deeper and help them succeed.
- Can you use what you've learned as a strategic tool and/or lever to map out and form co-partnerships with other providers in 3-way-win arrangements? These could be programs, affiliate links, events, referral fees. Get creative!

It's a huge advantage to know you have a waiting audience who already knows, likes and trusts you—and it's where sustainable growth can take hold.

To grow even more efficiently, start customizing your "mass" messages. Email isn't the only way to carry on these one-on-one conversations, but it is certainly one of the most effective, in large part because the platform is not controlled by a 3<sup>rd</sup> party the way social media is. (If you're not getting good response to your emails, be advised the problem is not the channel, it's your content.)

**Remember: in personalizing messages you're not trying to fool them; you're meeting their expectations that you will use the information in ways that serve them better.**

Here are some of the easiest ways to start creating conversations through email:

### Customize your campaigns

Provide content that addresses their needs. You may not need to create completely unique messages; depending on how different your segments are, you might:

- Re-order your content blocks so what matters most to each list comes first.
- Vary the opening to use terms or language that resonates most strongly.
- Swap out a service or product promotion block, event invitation, or other upsell introduction based on what's more in line with their interests.

Tools like Constant Contact and HubSpot make customization relatively simple to do. If it makes sense for your business (based on the size of your transactions) it's even possible to customize in really detailed ways, like referencing what product or service someone has bought or when.

### Invite interaction

- Be real, human, helpful and generous: have a "persona" or sample client in mind for each segment, and imagine you're writing to them.
- Test email frequency. It's a delicate balance; sometimes more is actually better than less—if you offer value, they'll be happy and you'll be top of mind.
- Ask questions or polls—and be sure to share the answers! You may even be able to use responses to develop future relevant content.
- Be suspenseful (in a good way). Include links to info they'd appreciate—your own and other people's—but drop hints in your messaging about how they'll benefit, rather than giving it all away. (Like how Netflix gets you to binge shows!)
- Share content that builds off their recent activity as well as their overall segment, using personalization techniques outlined above.
- Share useful information 3x as often as you sell—really, 3 valuable content emails to every 1 promotional one is a solid rule of thumb.

Questions? Want to chat? [Schedule yourself for a free 30-minute call](#)—you can do it at [BeaconCreativeLab.com](https://BeaconCreativeLab.com)

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