GROW MORE CLIENT LOVE

A step-by-step guide to designing your client communication program

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Welcome to **Grow More Client Love**, *your step-by-step guide to designing a client communication program*, specifically geared to all those who are on a mission to provide services that help change their clients lives.

This is a comprehensive guide, and while aiming to pack huge value into as concise a package as possible, we may have inadvertently jumped over steps or made assumptions that leave you hanging… if that happens, let us know!

And/or if you need help or answers at any stage of the process, please feel free to get in touch and I and the team will help put you back on track.

All our best wishes for your success—your clients eagerly await your outreach!

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The Situation

The client retention program you create with the help of this guide will support you in overcoming one of the major business challenges most service providers face:

Ensuring client care activities are consistent
and maintained both at *and between* visits

Once upon a time clients might have been okay being passive receivers, but not in today's world, where we are used to having significantly more control and influence over our situations, services and lives.

It's a fact: clients try out service providers. You may regard someone as a client once you've provided advice or care. The client's view is likely to be a little less committed. He consulted you, and is now consciously and unconsciously weighing:

- The total in-office or virtual experience—physical or virtual space, support staff, your systems and tools, parking, reception… you name it!
- His impression of your respect for him (convenience factors, wait times, etc.)
- Your sense of care for his overall results—not just limited to your area of expertise
- Your service and the success of your recommendations
- How (if!) you follow up
- Whether he feels recognized and/or remembered

What you've actually created at the first visit is *client potential.* Every business that wants to increase retention and **keep clients engaged** needs to focus on converting *client potential* into *actual client relationships*.

Let's design a program that will help you minimize the hurdles to forming effective, engaging relationships!

First we'll look at factors you need to consider when building your program. Then we'll share nitty-gritty tactics to test in your business—and yes, I said test; there's far more science than art in building a successful program!

The Benefits

While this guide to creating an overall client retention program is about much more than *just* email, email is a critical part of the most successful programs.

Since we know some may be less familiar with this tool, we wanted to offer a quick summary of the biggest benefits:

- **Relevance to Clients' Needs**: You can plan ahead and automate timing of delivery so messages are timed to the right clients at the right time.
- **Efficiency**: Reach many clients, adding value and care to their experience, more frequently but using far less personnel time than other communication methods
- **Permission-based**: your clients have given you the okay to "knock on their door."
- **Awareness and Positive Reinforcement**: Your business, and clients' own success, stay top of mind more readily. Every time your message pops into their inbox, they're reminded of conversations you had, creating positive reinforcement.
    - Plus, because you're providing value in the exchange, you're helping to reduce the likelihood that another person's happy story about a different provider will entice them to try someone new.
- **Referral Support**: You're more likely to be top of mind for their referrals, because you're checking in and adding value to their life.
- **Direct Relationship Channel**: No one except your clients can take this channel of access away (unlike social media platforms that can change access in a heartbeat).
- **Differentiated**: Your emails actually reflect your business—they sound like you, tie into themes and questions you're actually seeing with your client base, and reflect any staff your clients see when they come to your office.
    - *Some businesses buy in to news created for the industry by professional groups that then "customize" by adding the business' logo, colors and possibly a message from the owner or manager. While that's absolutely better than nothing, it pales in comparison to the impact a custom-built, professionally written email program can have.*

The questions explored in the following pages will give you the foundation you need to design a communication program based on your business, and your clients. If you need help, or have questions, just email wendy@beaconcreativelab.com or message us on Facebook @BeaconCreativeLab.

Let's get started!

Step 1: Lay Your Foundation

Define the OBJECTIVES for your Communications Program

The top objective for all businesses is likely to be something along the lines of:

Support the positive seeds we and our staff have (hopefully) planted during clients' visits (and break down any possible obstacles).

You may have other objectives too. List them here:

Clarify the Distinguishing Aspects of Your Business

An ideal client-provider relationship requires trust, naturally, but it doesn't stop there. Sharing a fundamental agreement on approach and style helps establish a basis for good rapport—critical for any relationship. Take the time now to clarify the elements that distinguish your business, perhaps differentiate you from others, and the ways in which your ideal clients connect with your approach. You'll carry what you learn into your client retention program later.

A. What are the non-negotiable elements in how you deliver your services? For how you operate as a business? For what makes your business distinct from someone else's? [Think about your systems, tools, support, delivery, pricing, availability, or innovations.)

B. How might you serve clients if you could clone yourself, or if you could find a way to share your knowledge and care without having to be physically present and/or on the phone?

C. Consider your ideal clients: What do they have in common? What do they seem to like in your approach, style, and systems? What do you think would make them even happier or more satisfied?

D. Finally consider the not-so-ideal clients: What do they have in common? What prevents you and them from seeing eye to eye?

Identify the Important Segments in Your Client List

You wouldn't engage with your spouse, your mother and your best friend all in exactly the same way; neither does it make sense to engage with every client exactly the same way!

By all means set standards for procedures, quality of the services, customer service and consistency in how your business presents itself to the world (e.g., your "brand"), but when it comes to engaging clients you'll need to tailor your communications program to the individual as much as possible. The more often and the more genuinely you show caring for a specific situation, the stronger your ties are likely to be.

A. Create a list of the main segments or sub-segments you would want to address in your client base; at a minimum you might consider: Demographics (e.g., Gender and/or gender identification; age; income, location); major concerns, interests or needs; Stage of the buyer journey or of your process.

B. Create a list of the information you'd need to capture in order to automate more-personalized communication, e.g.,: Date of last meeting; categorization for last project or visit type/purpose; Referral provided; Main trouble areas or interests

C. Itemize each possible touch point you have with clients, using the suggestions that follow as a thought-starter. Add any additional touch points you incorporate. Then, imagine what care looks like through your clients' eyes… are there touch points that clients might want that you aren't currently making at all?

C T E P ❑ Finding your business (Google search, Facebook, your website, industry or networking referral site)

C T E P ❑ Initial sign up to an email list on your site (before they set an appointment)

C T E P ❑ Welcome email

C T E P ❑ Call/online booking of 1^{st} appointment

C T E P ❑ Appointment confirmation

C T E P ❑ Pre-appointment testing, screening or input document

C T E P ❑ In-office greeting

C T E P ❑ Pre-appointment time with receptionist

C T E P ❑ Appointment with you

C T E P ❑ Payment and Scheduling next appointment

C T E P ❑ Post-visit follow-up (feedback, homework, test results, general follow up, follow up on a referral you make to another professional)

C T E P ❑ Reminders to schedule another appointment (even if that's down the line)

C T E P ❑ Ongoing "accidental" contact (email news, social media posts, ads they may see, podcasts, radio/TV, YouTube)

D. For each of the above touch points, decide which channel should be used for your outreach—phone call (C), text (T), email (E), portal message (for business that use those) (P)—and circle the method you will consider using in your new Client Retention Program.

> **TIP:** Consider the time, cost & feasibility of delivery for these, but also consider them *from the client's viewpoint*. Might there be a major lift in satisfaction by changing to a more personal channel (e.g., call vs email)? Note any tests you should implement to determine impact…

Lay the Groundwork for Ongoing Dialogue

As a service provider today, you're probably well trained and practiced in good listening one-on-one. Using the communications tools available today to expand your listening and grow opportunities for dialogue will help set you apart and facilitate the engagement that will support client success and retention.

Consider how you can use your Client Retention program to grow YOUR listening & THEIR sharing:

A. Under what circumstances do you currently follow up *yourself*? What method(s) do you use for each?

B. When do you have a staff member follow up? What method(s) do they use?

C. When and how do you (or could you) use printed or emailed surveys to learn more about client satisfaction, likes and dislikes, interests or needs? When and how do you reflect on input?

D. You'll create a stronger relationship if you validate the client's side of the conversation after you collect any input. How can you plan ahead to respond to them, not only with a thank you message but also with some indication of the impact their voice has had in your dialogue?

Many businesses are using portals to facilitate information sharing. If yours is among these:

D. How often are your clients/patients using the portal?

E. Which clients/patients are using and which are not?

F. What sort of training, feedback and dialogue in general have you had with clients/patients about the portal?

Define Your Success Metrics & Key Performance Indicators

You undoubtedly measure many aspects of your business to determine success and adjust strategies and tactics. Before rolling out any Client Retention Program, you'll want to be able to decide what's working and how you define success.

A. Recap the Client Retention Program Objectives you outlined on page 1; also list any new objectives you've thought of.

B. What factors, metrics or Key Performance Indicators (KPIs) do you currently track? What new ones, or new client segments will you need to monitor? What touch points?
Some ideas to get you started are*: # of sessions, packages or visits/client; Avg revenue/month (by client, by type of service and overall); Avg length of time a client is active, by segment; lifetime value of a client; any changes in these numbers based on client retention calls, emails or mailings sent.*

C. What additional factors do you suspect might influence engagement or retention? How can you test and track those?

D. Are there any other metrics you need to monitor to see if you're making progress toward the objectives above?

Step 2: Develop Your Plan

Define the Value You Can Offer Beyond Service Delivery [e.g. Content]

Your clients have turned to you for your expertise as a service provider. In a world full of incomplete and/or conflicting news, providing helpful or interesting information and insights can be a true service.

If you're worried that you don't have the time to develop all that content, freelance writers (like yours truly ☺) can help put your words into blogs, articles, emails and e-books—and do so far more affordably than bringing on a new staff member to do the job. Now that we've set that concern aside, come up with an initial list of the types of content you'd like to share.

A. What sorts of non-confidential information, education, news, products or services would you want your clients to know about? Here are some ideas to get you started:

- ❑ News about your business, and/or about related developments or studies
- ❑ Your insights on trends
- ❑ Special services or products you offer
- ❑ Tips related to your discipline
- ❑ Links to other community resources
- ❑ Other?

B. What do you wish your clients knew—about your business, discipline, self-assessment, or health in general?

C. What other things do you wish you had more time to educate clients about? What types of content would make clients feel more connected to your business, proud to be a client, or just generally feel more warmly towards you and your team?

- ❑ Team member profiles, highlights and motivations
- ❑ Stories about community works you, your staff and/or business are involved in
- ❑ Special "thank you" items or offers—your own, or in partnership with others
- ❑ Other?

D. A certain amount of personalization in that content can create much-needed relevance; too much can be downright creepy. Scan the client segments you listed earlier to see if you can identify any other data points you might capture in order to share these things by email without going overboard (or conflicting with HIPAA rules if that applies to you).

Segment	**Relevant Content to Share**
Ex: 1st meeting; Snoring; Female; High glucose	Welcome; Sleep help; Calcium options; Balancing carbs

Want more Ideas for ideas for content to share? Visit TapThis.Group

Develop Your Timeline and Content Calendar

Because many businesses are sporadic or sales-y in outreach, one easy way to set yours apart is through consistently offering value! Your goal is to be present often enough to be welcomed when your message crosses your patient's path.

Staying in touch consistently reminds them that you're available, and can also show they're more than just a billable transaction to you. The actual interval between outreach will vary at different stages in your relationship with each client; the touch points you developed earlier will make a good general guide to those stages.

Look back at the major client segments and touch points you defined earlier, and start to sketch out a few communications you can start to commit to. Start slowly—you'll be able to add more to your calendar over time. Here's how a chiropractor might start:

Segment	**Touchpoint**	**Content Objective**	**Interval & content for next outreach**
Ex: low back pain	Visit w/patient reporting acute pain receding	Encourage compliance w/ maintenance exercises	7 days: email link w/encouragement and video of exercise demo

Step 3: Get Started

Congratulations on completing the deep thinking and planning needed to get your Client Retention Program underway! Now it's time to put your plan into action. Here's checklist to help you with implementation:

- ❑ Determine what data needs to be captured that is not currently being captured
- ❑ Assess what changes/updates you need to make to your current automation tools (for call, text, email or portal messages)
- ❑ If you don't already have one, research and select the email service you'll use for your automated messages. **REMINDER**: If you're a medical provider, be sure you choose one that will sign your HIPPA Business Associate Agreement (At the time of this writing, Clinical Contact, LuxSci and Keap are ones to consider).
- ❑ If you don't already have one, add a permission note to your new client form that advises them you would like to send business news, valuable information and other newsletter content by email; allow them to opt out if they want to, and be sure this opt-out is captured in your client management system. (Alternatively, you can include the opt-out message in your welcome email.)
- ❑ Set up the initial segments you want to work with, and download the lists from your customer management system (for those you can successfully segment out).
- ❑ Decide who, and how often, lists for each segment will be downloaded from your client management system, and uploaded into your automated email service
- ❑ Decide if there are any new social media channels you want to establish (e.g., YouTube, Pinterest)?
- ❑ Review your existing information, videos, tools and other resources, making a list of any content you already have.
- ❑ Referring to the segments, touchpoints and content idea lists you made in the last section, what are the top 10 items of content that need to be created.
- ❑ Decide who will create these 10 content items, and get them started.
- ❑ Create a content calendar for the automated email messages you want to send, referencing the message intervals you set out in the last section.
- ❑ Send an announcement email to all clients that provides value and lets them know the interval you expect to use for general news; include the option to opt-out.
- ❑ Schedule your messages for sending, including tests for subject lines, delivery times, content types.
- ❑ Schedule time to review your results, and modify accordingly.

Where to go from here…

You've come a long way, and deserve to feel proud of your progress! It takes time to craft a Client Retention Program that will build rapport, be relevant, be timely and consistent, open dialogue and remind clients what makes you unique… but this is so worthwhile!

If you need help at any stage of the process, please feel free to get in touch. We are here to support your success, with:

- ❑ **Coaching**—by the hour or on a monthly basis
- ❑ **Copywriting**—expertly extracting your expertise and turning it into patient-friendly prose that captures your unique voice and style
- ❑ **Operational Support**—available to relieve you of all the pain you may be envisioning in setting up your email program, segments and maintaining your content calendar and more.

Very best wishes for your success—your clients deserve you!

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