Clients for Life: From First Sale to Long-term Relationship

by John Chapin

I've had a lot of people ask me about client retention because it's something I've been very successful at over the years. On that note, here's how I did it from the initial sale all the way through the entire long-term relationship.

Steps to take with the initial sale:

Step 1: Verbally thank the client for his business when you close the sale.

Step 2: Review expectations and what will happen next.
Whatever your particular steps are, go over these steps with the client and let him know how and when he will be kept up to date.

Step 3: Ask the client if he has any final questions, thank him once again for his business, and reiterate when he will next hear from you or someone from your company.

Step 4: Send a handwritten thank-you note the day you get the order. *
Sign the thank-you note in blue ink and include your business card.

Step 5: Introduce other team members they might be working with.

Step 6: Follow up and deliver what you say you'll deliver.
At a minimum you *must* deliver *what* you say you will, *when* you say you will. Ideally you'll deliver *more* than you say you will. Always try to give something extra.

Step 7: Call or stop by in-person before, during, and after initial delivery of the product or service.
It's particularly important in the beginning of the relationship to communicate often. This may feel like micro-managing and it is. You have to ensure everyone does what they're supposed to do and everything goes smoothly on this initial sale. It's best to follow a check-list.

Step 8: Survey the client on how you did.
Do this step in-person or on the phone. What did you do well and what could have been done better?

*** - Note:** Depending upon the size and significance of an order, it may be appropriate to thank a client with more than a thank-you note. You may also do this for more than just the initial order. Here are some various ways to do that:

- Small gifts: golf balls, nice pens, cups, etc.
- Gift certificates
- A gift to one of his favorite charities
- An investment in client's business or something else they are involved in
- Vacations or trips to trade shows and other industry events

Next, shift your focus to building a life-long relationship.

Step 9: Reach out 18 to 26 times per year.
Reach out in a variety of ways: phone calls, e-mails, regular mail, in-person visits, Fed-Ex, etc.

a) Three contacts: Send out a holiday, birthday, and anniversary card.
In addition to sending out holiday cards, you can send gift baskets, bottles of wine, champagne, and other items to your best clients. Also, Thanksgiving and New Year’s Cards (potential fourth and fifth contacts) stand out because few people send them, but I’d still send a December Holiday Card.

b) Here are some other ways to reach out to clients 18-26 times.

- Send cards for promotions, new babies, and other celebratory events.
- Send Get-well cards.
- Visit clients in the hospital.
- Send items pertaining to their interests and hobbies such as books and t-shirts.
- Act on personal information about your clients’ family members and send out notes to acknowledge graduations and similar events.
- Get your clients on the mailing list for company publications.
- Develop your own newsletter or monthly article and send it out to your clients.
- Attend events sponsored by clients.
- Do business with your client and send them business if possible.
- Send copies of industry articles that may affect their business or simply be of interest.
- A good business book or resource
  Note: You are an expert. You are expected to be learning, reading, and passing applicable and valuable information on to your clients and prospects.
- Send information out on new products.
- Send promotional items.
- Donate money to their favorite charities or events they sponsor.
- Drop by with baseball tickets.
- Take clients to lunch, dinner, other sporting events, shows, or out to play golf or some other activity.
- Connect them with other companies, other people they’d like to meet, and other professionals such as lawyers, CPAs, insurance agents, and Realtors, and vendors.
- Send them potential new employees.
- Connect on social media. (Use discretion and your best judgment here)

Step 10: Practice these overall client rules:

- Always make the client your number one priority.
- Keep communicating. Focus on good, solid communication.
- Personalize the relationship and always seek to build and strengthen it.
- Let clients know you appreciate their business and that you don’t take them for granted.
- Focus completely on the client and how you can help. Always do what’s best for them.

- Stay on your toes and do what you say you'll do.
- Go above and beyond. Deliver more than you say you will.

Note: You don't *need to* follow this plan with *all* your accounts, only with the clients you want to keep. Most likely your largest clients. If you follow the 80/20 Rule, you will be doing this with your top 20% of accounts that give you 80% of your business.

If you care about your clients, treat them right, build strong relationships, and keep them happy, you will rarely have to worry about having enough business. Not only will they stay with you, they will also refer business associates, friends, and family. In addition, if you're working with happy, life-long clients all day, your work and life will be much more enjoyable.