

How To  
**Create**  
A Customer  
Relationship  
For  
*Life!*



Brad Tonini  
*Australia's Champion Entrepreneur Coach*

# Introduction

Welcome to *'How To Create A Customer Relationship For Life'*.


Business is competitive today. In fact statistics tell us that it costs 6 times more to attract a new client than it does to keep an existing one.

*"How To Create A Customer Relationship For Life"* is an action oriented program aimed at building a wall around your customers as well as attracting new ones.

The principles in this program are simple but not easy - if they were easy, no-one would ever lose a customer!

Get ready to build a customer retention system right now which will create real, long-term multiple streams of income, which can be increased without you having to be involved in the business every day.

I welcome you to this new program and hope you enjoy the interactive exercises after each mini chapter.



**Brad Tonini**

*Australia's Champion Entrepreneur Coach*



**HOW TO CREATE A CUSTOMER RELATIONSHIP FOR LIFE!**

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# 1. *Everything Starts With A Sale*

***Without a sale there's no business.***

The sale creates work for you, your staff and suppliers. As entrepreneurs, we get caught up in the product. We get caught up in the dimensions, how it's going to look, the colour, the way it's packaged, all the little things that are very important but not paramount to making the sale every time.

***Entrepreneurs focus on market - not product first***

We've got to hunt out a market, look for the niche, look for the opportunity first and then create the product that meets that market need rather than the other way round. So many entrepreneurs come up with the product first and when they've got a garage full of products they say, 'How am I going to get these units out the door?' This is one of the easiest rules to break.

My father is an entrepreneur. Amongst the countless winners which sold in the market place, he always had a stack of things in the garage that never sold or things that sold slowly over many years. We just moved these things from one garage to another, in every house we went to.

I remember when he was selling a brand of shampoo called Golden Products - probably some multi-level marketing idea - didn't sell. I still remember cleaning the car with it 15 years later, which was about the only good use for these "golden" products.

I wish I had a dollar for every one who came to me with a fail-safe concept, a profit-maker or the best thing since sliced bread! I get told all the time, "I've got this product, it's going to be a world beater". People get so excited about their products, and that's all wonderful stuff, but they forget that the key element is how to actually sell it.

When products don't sell, entrepreneurs get depressed because it's costing their families mortgage payments, food and everything else, because they were hell bent on this product being the one that was going to make them a fortune. Yet if they were a bit more pragmatic, if they had a little more understanding of what is involved and if they had just tried to find the market, then maybe they wouldn't spend so much time on creating

the perfect product. Opportunities of a lifetime come along once a week, which is so true when it comes to investment opportunities, product opportunities and acquisition opportunities. There are plenty out there, these opportunities are around us all the time, it's just a matter of hunting them out and being aware of them.

***Once you attain a client, service them forever***

Can you think back to the first client you ever landed? I can. Seventeen years ago I was selling a \$17.50 product called a stationery kit. This client bought 75 of them and I was absolutely blown away. It was a \$1000 sale! I thought it was fantastic that somebody would actually spend \$1000 with me - infact, so fantastic I almost talked myself out of it!

And I'm sure that if you think back through your own life, you can probably recall your first sale. It's a pretty momentous occasion.

The first thing is to ***create the client***. You've got to get out there, and hustle and network to make it happen. However, once we get that client, the system has to take over. There has to be a 7-9 point checklist about what actually is going to happen now with this customer. In other words, a database entry must be put into the system - a 'welcome' letter must go out to them. A newsletter must go out. Once you have a client, service them forever.

Many people do this in an ad hoc way, they don't really think in terms of the system. I come in on the tail end of this all the time where people who have customers who don't create a great database and don't have a customer relations management (CRM) system, and yet it's paramount.

The lifetime value of a customer can be worth thousands and thousands of dollars to your business. It's very simple to implement, yet so many entrepreneurs don't do it. So create a CRM system, and you'll always have a customer to service.

There's an American author called Joe Girard who wrote ***How To Close Every Sale*** and another book titled ***How To Get The Best Deal Every Time***. He had some very practical philosophies. His books were about the life time value of a customer.

Girard writes about the Ferris Wheel Principle which was based on his experience as a salesperson working for the leading Chevrolet dealer in Detroit USA. He is listed in the Guinness Book of Records for having sold over 13,000 used cars, all at retail level. Girard's 'Ferris Wheel Principle' is that everyone goes round and round on the Ferris Wheel of life, and as far as cars are concerned they ride around for between 2-5 years after which they're in the market for another car purchase.

Girard created an A-Z card system which he kept on his desk and he'd simply log the customer in two years in advance knowing that in 2-5 years that buyer will be back on the Ferris Wheel. And he therefore made sure that the customers were being looked after when they reach the bottom of the Ferris Wheel and wanting to buy a new car. I call it the Itch Cycle.

### *The pay dirt:*

The pay dirt: Next time you have a rip-roaring idea - the one that's going to be your world-beater, the one that's going to create a million dollars for you, just answer these three questions before you start:

- Can I actually sell this?
- Who will buy it?
- And what's my first step?
- Once you have a client, service them forever

Track when the customers' itch-cycle is coming up again — when they're going to start itching again to want to buy something from you.

# Everything Starts With A Sale

## ACTION PLAN

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1. *Where are the opportunities right now for you to make a new sale?*

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2. *What is the average itch cycle for each of your clients and how can you take advantage of this?*

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## 2. *Create A Perception, Then Make It A Reality*

***Marketing creates the perception; service makes it a reality.***

The entrepreneurs' objective is to create a perception in the marketplace that their product or service is better hands-down than what anyone else has to offer.

Is that actually the case? Not all the time. Over the years there are plenty of examples where products and services have not been as good as what their competitor has to offer yet they hold the No 1 position. Numbers 2, 3, 4 and 5 in the marketplace may in fact be significantly better, but the No 1 has created the perception in the marketplace that it is the best, and most consumers won't question that.

Don't try to be everything to everyone, just create a perception that you're an expert in a certain area, that your product is second-to-none in a certain area. Then the challenge is to make a reality, we've made a first impression, we've created a spot in the marketplace, then it comes down to reality.

### ***The pay dirt:***

When customers get that initial point of contact with your company, do your products live up to their billing? Ask yourself:

- What market do I own?  
*(There may be a niche market within your reach that nobody has ever explored.)*
- Is your service system meeting the perception you wish to create?
- Is the face-to-face experience of your sales personnel meeting that perception?

*(This is where a lot of the selling falls down because the marketing has been so good that the difference between the perception and the reality is difficult to achieve.)*

- What impression do you want to make and how are you going to go about making that reality?

# *ACTION PLAN*

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1. *What perception do you give out in the marketplace in your advertising and marketing?*

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2. *What position in the market could you own?*

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3. *Is the reality in dealing with you matching the perception?*

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### 3. *Always Under-promise And Over-deliver*

#### ***When Dealing With The Customer***

*Over-promising* and *under-delivering* is a sure-fire way of losing a customer for life. And it's amazing how many times entrepreneurs gets this round the wrong way!

The initial perception will be good when over-delivering on a promise. The feeling from the customer will be that they trust you, that you've got the situation in hand, and that you run a professional company.

Handling matters the other way around is bad news. If we over promise and under-deliver the perception may be that the salesperson will tell the customer anything to get the sale.

At the time over-promising may be quite sincere - you thought you could indeed meet the client's request on time. You might have been excited or motivated in completing the task in fact, however you didn't consider everything else you have on your plate.

Trying to achieve your original promised deadline just doesn't cut it in the global marketplace - Near enough is just not good enough.

In not actually delivering that product or service on time we also miss out on one of the biggest sources of business. The power of referral that flows from this.

#### ***The pay dirt:***

If you over-promise and under-deliver every time, you are effectively cutting off to a great wave of referral business. And in so many businesses (especially service businesses) referrals create 80% of the leads, which leads to my next point...

Think for a moment where you may be letting your clients down right now and what negative effect this could be having in your future business.



## 4. *The Cheapest Way Of Getting A New Client*

### ***Work with someone going to the same market***

The cheapest way of getting a new client is through business referral which costs you very little. It might cost you the occasional lunch or promotional item to get people to refer customers to you, but that's far less than going out and advertising to the general public. A misguided advertising campaign can be very expensive, yielding very few results.

### ***80/20***

The 80/20 rule is typical of how things work. Therefore if you've got a customer base of 1000 clients and 200 of those produce 80% of your sales volume, those top 200 clients are going to be absolute advocates of your product or service. This means they would be prepared to refer your service or product to others if asked. Not only that, they you can guarantee they would present that referral in an absolutely positively way.

"Would you mind referring me to others?" is a question most entrepreneurs are too shy about asking for fear they might appear rude. So they never ask the question, "Do you know of anyone else who would have a need for my product or service?" What's so difficult about asking, "Do you know of someone else who would also need - a massage? A haircut? A coach? A tennis coach? A website? A copywriter? A broker?"

Of course you can offer them an incentive to do so. We give our loyal customers a free gift referring a client to our database. If the reference strikes pay dirt and that client purchases from us, sure enough a gold pen goes out to the referee. *(Don't be afraid to give something just for the referral as most of the time the selling is up to you.)*

I have found that some 20% of my client base will respond to this referral offer. And then, of those, probably another 20% of the 20% - some 4% - of the entire database give multiple referrals. Some of these refer up to 6-7 names at a time, so never ever underestimate the power of referral, which only requires asking some simple questions. ***Work with someone going to the same market.***

## *Work With Someone Going To The Same Market*

The second-cheapest way of getting a new business is an introductory offer to those willingly to try your services or products.

One of my colleagues, Chris Newton of the Results Corporation, Queensland, often talks about the value of cross-promotion or as he wanted to call it "Host Beneficiary Relationships". One of his best examples is a car dealership in Perth who gives a free basket of goodies with every new car sold. Among the many items in this hamper is wine from the local winery, a voucher for the local hairdresser, and \$60 restaurant voucher for a dinner for two.

A hamper like this can be put together for your customers at a minimal cost to your business. To create this offer the entrepreneur (this car dealer) understood the value of a new client and the cost of getting a new client to each business involved.

It was advantageous to the winery, the hairdresser, the restaurant, etc, to be a part of this promotion as it introduced new clients to their products and services.

## *Break Even or Below!*

Host beneficiary partners understand that if they were to work on break-even for the initial new client transaction they you could afford to write-off the gross profit of the first transaction for its promotional value. (You see, by placing an advertisement to get new clients this will cost you money for new lead, anyway).

The car dealer approached the restauranteur and said, "If I can create 200 - 300 new customers for you per year, what would that be worth to you?" And of course the restauranteur knew was happy to give away the entire profit of the first transaction and he gave the dealer the cost price (the hard cost of the food and accompanying wine, which was \$17) to create the \$60 coupon for the customer. He gave the car dealer 200 coupons at that price, which generated repeat business to the restauranteur and was considerably cheaper than space ads in the relevant magazines and newspapers, many of which would never be read.

## *Once They Come You Need To Impress*

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Now the onus is then back on you to make sure you not only honour your promise to the person with the coupon, but to also ensure that you wow them. The coupon has created a captive audience, and it is then up to the person honouring the coupon to make a positive impression making them feel that your product or service is unbelievable and remarkable so that they will come back and spend a full dollar with you next time. Maybe they will bring a whole table of people to the restaurant, all of whom are prepared to pay a full dollar because the experience has been so fantastic. This is a win win all round. It's a win for the client, a win for the referee and you're also winning because you're getting a stack of new clients every year!

## *Lifetime Value*

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The real win comes when you calculate the lifetime value of that customer by multiplying the number of times they will provide you with profit - generating future business. This is something that the average small business person doesn't understand. They just think about it as giving away margin, and they can't afford to give away margin. Yet they probably take out a full page ad in the newspapers, risking up to \$2000 a pop, often for very little response.

## *The pay dirt*

This is a guerrilla marketing technique that creates future generating business for you.

## The Cheapest Way Of Getting A New Client

# ACTION PLAN

1. Who could you get referrals from right now?

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2. Who could you work with in a "Host Beneficiary Relationship"?

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3. What is the lifetime value in terms of life "gross-profit" of your best 3 clients?

ie. Number of purchases per year \_\_\_\_\_

x Average order value \_\_\_\_\_

x Number of years as a client \_\_\_\_\_

\_\_\_\_\_

= Total LTV = \$ \_\_\_\_\_

x Margin % \_\_\_\_\_

= Total lifetime gross profit of client = \$ \_\_\_\_\_

## 5. *Respect Thy Customer*

### ***The Golden Rule - Treat Others As You Want To Be Treated***

Just because a customer hasn't bought anything from you over for a long time, possibly as long as the last 12 months, doesn't mean that customer is dead in the water. That customer will purchase again if given enough reason.

For example, our database has captured 15,000 executives Australia-wide who buy our executive diaries and promotional products, pens, calculators, gifts, business card holders and whatever else we have in our range. Sometimes they may not choose to buy one of our diaries in a given year. Those who don't buy are not immediately taken off our database, we keep mailing to them and we offer them many opportunities to purchase again and again.

#### ***Not The Right Time!***

We keep them on the database for at least three years before taking them off. I reason that we may just have approached them at the wrong moment - they may be overseas, they may have purchase from a local office supplier because it is convenient, etc. There might be any number of mitigating circumstances, none of which precludes them eventually coming back if we come up with the right offer.

I really want their business back, and at the end of that period I understand that we have to come up with a special offer comeback and I respect the fact that customers have their own buying pattern which do not always coincide with our selling pattern.

Think about yourself as a customer and what you expect when you are visiting and purchasing from business:

1. What do you expect from the person serving you?
2. What really "Cheeses you off" - What don't you stand for?
3. What has really impressed you in the past? What has the "wow factor?"

#### ***The pay dirt***

Treat others how you want to be treated - remember you are also a client when you buy and you know what you expect from the person serving you.



## 6. *A Quality Look Attracts Others.*

### ***How Attractive Is Your Business?***

#### ***First Impressions***

How are you making it easy for people to work with you? Are you now too close to your business so that you can't be objective - if that's true enough I suggest you get someone who *can* be objective and give you an opinion as to what needs to change.

A quality look is very important. What's attractive about your business? A quality look attracts others is all about the perception of packaging your product or service to attract other in the marketplace. I'm amazed at the number of people who put out a single colour brochures or photocopied flyers while still expecting top dollar in the marketplace.

#### ***Are You Congruent With Your Business?***

Set up an internal system of multiple contact points with your customer. This is the best way of showing respect for the customer, one example being is a system of "how's things?" phone calls.

My sales team place a "how's things?" phone call approximately seven days after the fulfillment of their order. Then, we place another call 30 days after the order is put into our production system. It's just a matter of multiple contact points in creating this on-going relationship with a client.

"How's things?" is a great way to make sure that we're delivering on our service or our product. And the customer will be blown away by that because very few businesses go to the trouble of actually checking that they are living up to their billing. They just assume all customers think their product or service is good, which may not necessarily be the case due to unforeseen circumstances or oversights.

The "first impressions" audit - Have a look at the key areas as below and grade yourself out of 10 in these areas:

- |     |                                |                                   |                             |
|-----|--------------------------------|-----------------------------------|-----------------------------|
| 1.  | <b>Signage</b>                 | - Company name clear?             | Score: <input type="text"/> |
|     |                                | - Positioning statement clear?    | Score: <input type="text"/> |
| 2.  | <b>Grounds</b> (If applicable) | - How are they kept?              | Score: <input type="text"/> |
| 3.  | <b>Reception area</b>          | - Inviting?                       | Score: <input type="text"/> |
| 4.  | <b>Phone answering</b>         | - Perky, excited?                 | Score: <input type="text"/> |
| 5.  | <b>Welcome board?</b>          | - Consistently in reception?      | Score: <input type="text"/> |
| 6.  | <b>Clean uniforms?</b>         | - Well pressed, neat?             | Score: <input type="text"/> |
| 7.  | <b>Your Corporate Image</b>    | - Letterhead, Business Cards etc. | Score: <input type="text"/> |
| 8.  | <b>Promotional Flyer</b>       | - Does it really say what you do? | Score: <input type="text"/> |
| 9.  | <b>Current feedback</b>        | - Survey, Suggestion Box?         | Score: <input type="text"/> |
| 10. | <b>Team</b>                    | - Grooming, attitude?             | Score: <input type="text"/> |

A stand caught my attention at a recent trade show I recently attended. The trainer was selling \$2500 training courses which seemed to me like reasonably good value for what it was. But their brochure was awful.

It had a photo of the trainer on the front cover that made him look pretty ordinary. Not only was it a photocopy but it had gone through two or three generations of photocopies.

Apart from that there were other things in the trade show display that just didn't sit right with who he was. The business cards were shoddy, in fact everything about the corporate image wasn't right, yet he was asking for a pretty healthy dollar in the marketplace.

### *The pay dirt*

It's all a perception of quality. It's down to the details that you may not necessarily think are important. Encourage a regular stream of customer comments so you can learn as you go.

- Can you package your product in such a way that it creates a high quality perception?
- How about the way that it's freighted to the customer — could it be couriered out rather than put in the mail? If you're at the high end of the market the customer will pay extra for the postage, handling and insurance. (We've found this time and time again, upgrading the post from \$7.95 to \$8.95-\$9.50 is not a huge cost — it's a gradual increase that covers the cost (in some cases) of a registered postal item or a better delivery.
- How about the manuals you produce?
- How about the condition of the floor and shop front display?
- How about your conversation and appearance?
- How about the music that's being played?



## 7. "Build It And They Will Continue To Come"

### **A Great 'CRM' System Does So Much For Your Business**

The concept of "build and they will continue to come" is all around this idea of the **customer relationship management system (CRM)**. The CRM system is absolutely paramount to a business creating ongoing sustainable income.

As a great CRM system does so much for your business:

1. It provides consistency, or as Michael Gerber would say  
"It turns your business into a turn key business"
2. It enables you to concentrate on growing your business and not get involved in  
"the day to day"
3. It builds trust between your client and your business.

Let's just walk through what a good CRM system looks like. See if you can make it work in your business:

**1. First point of contact.** The first step in a customer relationship system is that initial point of contact. Step one is - what happens at point of contact with a potential new client, prospect or customer? And what happens within 24, 48 and 72 hours after that point of contact? What is your first step when approaching a potential client? How do you do that? How does it look? What is it that you get from them? What does your business card look like? How do you deal with them when you get to the office? Do you ring the person one day later? Do you send them an email saying 'thank you, it was lovely meeting you'? Do you send them a copy of your newsletter?

**2. Welcome.** What happens after clients make their first purchase? Nothing happens in most companies. The order is taken, worked on and that's about it. I suggest a Welcome Pack after clients have made their first purchase. A Welcome Pack tells clients who have just come on board how much they are appreciated and all the information required

to use the purchased product. It would include a personally signed well written letter encased in an attractive folder, with testimonials plus other documents showing your entire range.

It would not be a selling document - you've already done that - but one that adds to your credibility and congratulates the customers on their excellent choice. How about placing a call to say, 'We're working on your order right now and we're seven days out from delivery'. Or perhaps a letter that says, 'Welcome'. We've got to be full of integrity and totally sincere at the time of initial contact with that new client. Where's that welcome? It can be a letter, fax, email, phone call or whatever it be — where's that welcome?

**3. Ongoing relationship.** Now that the first transaction is under way and the product has been delivered on the first time, where's the second part of the process? Have someone in your office write, email or call to say, "Thanks very much for your business, we really appreciate it and we look forward to working with you from now on. If at any time you're not happy with any aspect of our product or service please do not hesitate to call me directly". Give your mobile number, as well as your office number. Make sure that the ongoing relationship is cemented down between the initial welcome and the delivery on the promise.

**4. Delivery stage.** The next point of contact comes 5 days from the delivery of the product or service. You could send a box of chocolates, you could invite them to an event, or you could think of something appropriate to the type of business you are in. After the product or service has been delivered, what do you then do to turn that customer service relationship into an ongoing client relationship?

Their purchase has created a different relationship now - one that's deeper, one that suggests the possibility of a relationship that is ongoing with the potential of referrals and further business. Maybe a newsletter goes every month, maybe it's an invitation to a seminar you might be running, a cocktail party, a luncheon, a collector's club or whatever is appropriate to your business.

**5. Calendar of events.** Creating a calendar of events is about making sure there are multiple points of contact between your business and your client in any given year. At NGT, we run a monthly Time Management newsletter which our Gold Club clients in the top 500 database receive every month.

Apart from that they also receive occasional invitations to my seminars or a “valued client reward” in terms of gift vouchers for my new books and videos. There’s always something happening. You’ve got to think through a flow chart of the way you want to run CRM system. Put it up on a white board — add to it, subtract from it, put in the Wow Factor and built it from the time a new client first comes in contact with your business to the time they mature into a 15-year lifetime value advocate of your product or service.

Your aim must be to create multiple contact points. I suggest seven or more contact points in a given year. This is not a new concept, but it’s something we tend to forget as entrepreneurs who are busy breaking new ground.

### *The pay dirt*

Don’t worry about doing all this yourself. Create an in-house system that automatically takes over and allows you not to have to worry about all the above because you’re confident that everything is being done according to your CRM schedule.

I wish you well in building this system. Do it and customers will continue to come back.

*"Build It And They Will Continue To Come"*

# ACTION PLAN

*Get others involved now in building your new CRM system*

*1. What are the individual points where there is client contact?*

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*2. How can you exceed expectations at each client contact?*

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*3. What does your calendar of events look like? How many points of contact do you have per year?*

<u>ACTIVITY</u>	<u>ACTIVITY</u>
January .....	July .....
February .....	August .....
March .....	September .....
April .....	October .....
May .....	November .....
June .....	December .....



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Coaching Champion Entrepreneurs

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## coaching | workshops | learning products

Brad Tonini has had over 12 years experience running his own businesses - NGT Executive Diaries is one of Australia's leading Diary / Organiser companies whilst Tonini Business Coaches runs workshops on Time Management and Entrepreneurship. Brad also writes monthly newsletters and delivers many keynote presentations at conferences each year on business building strategies.

Brad is the publisher of the highly practical and successful newsletter "Time Management" and has written two books "Time for Life" and "Make it Happen NOW!".

Tonini Business Coaches has numerous businesses coaching clients who work with Brad to achieve their personal goals and the goals of their organisation.

There are three levels of coaching available to small and medium sized business:

- Platinum Coaching Program
- Gold Coaching Program
- Silver Coaching Program

Depending on your preferred investment level and outcomes you are striving for, we can tailor-make our coaching to your needs.

Coaching packages can consist of face to face visits as well as telephone consultations to fax, email and phone support month to month.

In each individual coaching session a number of outcomes will be achieved:

- A review of previous actions from the last coaching session.
- An overview of the current business situation.
- Strategic decisions that need to be under-taken.
- Brainstorming for a range of solutions
- New actions developed for next month's coaching.

A number of areas can be covered in the monthly coaching program:

- A Strategic Game Plan for the business.
- A Business Success Audit.
- Cash flows, budgeting and projections.
- Marketing the Business
- Developing a C.R.M. (Customer Relationship Management System).
- Personal and Team issues
- Entrepreneur Leadership issues
- Customer or Supplier issues

### What Clients Say About Brad:

*"On behalf of the Australian Institute of Management and the City of Manningham, I would like to take this opportunity to express our thanks. The feedback has been excellent, and the evaluation forms are indicative of how well you presented the evening"*

Judy Brook - Corporate Membership  
Australian Institute of Management

*"Just a short note to thank you for the terrific job you did for Corporate Express this year. The feedback from the twelve branches you visited has been very positive."*

*"As a result of your animated and enjoyable training sessions I am sure we will get even more people volunteering for your sessions in the future."*

Sentoria Blackwood - National Training Manager  
Corporate Express

*".....As the workshops were held in November and December, the staff were able to start the New Year in a more effective and productive manner."*

*"The Workshops were of great benefit and thoroughly enjoyed by all those who attended"*

Jennifer Claudet - Bondor - Sales Support/Administration  
James Hardie Building Systems

### NEW E-BOOKS AVAILABLE ON-LINE

***"The Power of Thinking BIG!"***

***"Outsource or Perish!"***

***"The 80/20 Rule of Time Focused Achievers."***



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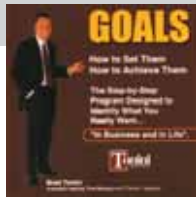
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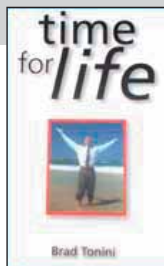
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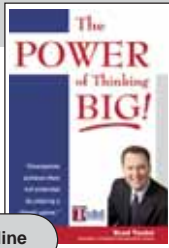
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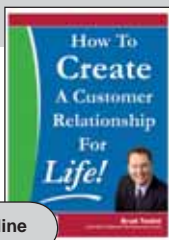
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