

How to Build

Fiercely Loyal Clients

Notebook



How to Build Fiercely Loyal Clients

Lesson One: Building a Customer Centric Culture

**Customer Centricity Purpose**

* Make Their Job Easier
* Make Them Look Good to Their Customers
* Make Them Look Good to Stakeholders and Their Boss

**Know Customer Loyalty KPIs**

* Retention of the RIGHT Customers @ 95%+
* Enhancement to Revenue % @ 50%+
* Getting the Right Renewals with Increases
* Referrals & References 70%+
* Survey Says: 85%+ 4&5s
* Testimonials: 5-10 Videos
* Long Term Commitment / Loyalty 10 yrs.+
* Gross Margins @ Expected Levels
* Jobs are Negotiated, Not “BID” Out
* There is a “Win – Win” Approach & Attitude

**Crawl Behind Their Eyes**

* Clear Vision of a Perfect Customer Experience
* Know What They Want / Expect / Envision
* Know Their “Points of Pain”

**Build and Sustain**

* Vision – Mission – Core Values – SB – Results

**Always Approach Them With**

* Solving Their Pain vs. Selling
* Use Past – Present – Future

**The Goal: Retention of the Right Customers!**

**Lesson One Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Lesson Two: Getting off to the Right Start All Aboard!

**Start your business relationship off right**

* Clarity of expectations
* Start with a definitive plan
* Minimize surprises

**It all starts with communication**

* Communication starts during the sales process
* Find out what type of communication your client prefers
* The sale is not done when the customer signs the contract
* The first few days after the sale are critical
* Make sure everyone in your organization is giving the customer proper attention

**Get to know your customer**

* Name, address, and phone number is not nearly enough
* Business is built on relationships, so dig deeper to know your customer
* Take the time to do it—it will be worth it!
* Develop customer profiles
* “The Harvey McKay 66”
* Decide who is responsible to create the profiles
* The details are critical—children’s and pet’s names, business they are in, etc.
* Don’t forget the “Hot Buttons”
* Share the information throughout your organization

**First Impressions are critical**

* The first few days on a construction job
* The first few visits on a new maintenance account
* Make sure the customer feels that they made the right decision to hire you

**Lesson Two Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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How to Build Fiercely Loyal Clients

Lesson Three: Know Thy Customer

Know Them Personally & Professionally

**Personally**

* Get Their Profile in Place ASAP on the Basics
* Find Any Mutual Interests/Areas in Common
* Practice “Active” Listening
* Practice “Focused Gab”
* Learn Their Language
* Mirror Their Style, Where Appropriate

**Professionally**

Know Their Business

* Where Are They in the Business Cycle: Start Up - Established - Declining

What Is Their Business?

* How Do They Make It Run / Make $?
* Who Are Their Customers?

Learn Their Language-Speak Their Language

How Are They Measured? What Are Their Goals?

How Does the Landscape Affect Their Business?

Know Their “Points of Pain”- Learn Their Expectations - Know Their Budgets

Crawl “Behind Their Eyes”

Describe / Know Their Culture: Dos & Don’ts

How & When Do They Create Their Budgets? What Is the Renewal Approval Process?

Learn Their Organizational Map / Org Chart-Who Reports to Whom?

Remember to Keep It Ethical, Legal, Moral, Safe & Fun!

**Exercise: How Well do You Know Your Customers?**

* Pick Your Top 10-15 Customers & Go DEEP!
* Conduct In Person Survey / Take Temperature
* Know Their Profile, Learn Their Culture
* Know Their Business
* What Common Interests Do You Have?

**Lesson Three Notes**

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Lesson Four: Managing Expectations

**Starts during the sales process**

* Don’t promise the world to sell the job
* Everyone that interacts with the client must know what has been promised
* If not, you may end up setting yourself up for failure

**From a Landscape Management Perspective**

* Initial clean up—how is it handled?
* Find the Low hanging fruit” to affect immediate change
* If you deviate from what was done in the past, explain why
* Document, Document, Document!
* Critical times to do the documentation
* Be up front and honest about how long it will take to show improvement

**From a Landscape Construction perspective**

* Starts during the design/sales process
* Be clear about the process and the timeline
* The first day of the job is critical
* Balance the client’s enthusiasm with what will actually happen the first day
* Your image is important—clean trucks, uniforms, friendly team
* Be sure the customer knows what to expect early in the construction process
* What will he finished product look like
* Balance what the client sees in the pictures to what mother nature gives you

**Measuring your success**

* Customer satisfaction
* Retention %
* Contract renewals
* Added enhancement work
* More referrals

**Lesson Four Notes**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Lesson Five: Building and Growing Relationships

**Know the Levels of Customer Relationships**

* Vendors -Trusted Advisors -Partners - Raving Fans -Evangelists!

**Vendor**

You Are Just Another “Vendor”.- You Are a Commodity.-Low Price / Bid is Their Focus. -Run!

**Trusted Advisor**

A Step Up from Vendor, The Customer Respects You, They Will Seek Your Advice.

They Will Usually Give You Extra Work & Last Look

**Partner**

You Are Now Getting There,Customers Won’t Make a Move Without Consulting You.

If You Mess Up, They Will Forgive You. ,10-15% of Your Customers Feel This Way About You.

Good Position Here!

**Raving Fan**

Your Customer Considers You a Partner!, They Love You and They “Rave” About You!

This Level Will Bring Tons of Referrals, Hard to Get Better Than This . . . Maybe

**Evangelist**

This Level Are Partners & Raving Fans Squared!,They Preach to Friends, Relatives & on Social Media.

They Preach to Strangers About Your Stellar Service, They Are Awesome and Hard to Find.

Take Care of Them & They Will Take Care of You.

**Tips, Tactics & Techniques to Move Your Relationship to the Next Level**

* Have a Clear Vision,A Clear Vision of the Perfect Customer Experience
* “Imagine Perfection Centered on the Customer” ,
* Know Your Customers’ Pain Points, Wants, Need
* Know Your Customer’s Vision
* Know the “Key Things” They Want / Expect
* Your Vision Fills in the Gaps & Fulfills Their Wants and Needs
* Build Relational, Not Transactional, Relationships
* Build Relationships Based on: Trust, Competence, Confidence, Friendship
* Be Proactive with Proposals that Enhance
* Be Responsive to Requests – Follow Up
* Build 3-5 Year Landscape Plans with Budgets
* Deliver Your Services at a Consistent High Level
* Meet and Exceed Their Expectations
* Give Them Peace of Mind - Make Them Look Good! - Make Their Job Easier
* Get Feedback with Surveys + Focus Groups

Use the Lessons Learned from This Seminar!

**Lesson Five Notes**

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Lesson Six: Customer Touch Points

**What are Customer Touch Points?**

* Your brand, social media, the purchase experience, etc.
* It’s the entire customer experience
* How easy are you to do business with?

**Many opportunities to touch the customer**

* Prospecting and networking
* Calls to your office
* Phone messages
* Face to face
* Proposals
* Handoff from sales to production
* Walk-throughs
* Focus Groups
* Ongoing phone communication with your customer
* Email
* Social media
* Surveys

**The customer is king**

* Find out their preference on how best to communicate with them
* Listen to what the customer is saying (or not saying)
* Know What They Want / Expect / Envision

**Lesson Six Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Lesson Seven: Conflict Resolution

**Life is not Perfect!**

* Mistakes will happen
* How you respond will go a long way towards making or breaking a relationship
* With strong relationships, even the big problems become small

**Complaints—An opportunity to build customer Loyalty**

* Resolving problems quickly results in more loyal customers
* A small increase in customer retention yields big increases in profits
* You want to hear from your customer if there is a problem
* Find ways to get their feedback

**The twelve-step approach to resolving conflicts**

* Thank them for calling
* Apologize
* Stay calm
* Let your customer vent
* Point out areas where you agree
* Build solutions based on agreement
* Ask the customer what they think is a fair solution
* Tell them you want them to be a satisfied customer
* Put the solution in writing
* Act on the solution immediately
* Check on the customer’s level of satisfaction
* Follow-up

**Keep your promises!**

* Helps build a positive reputation
* It takes a long time to build a reputation and only seconds to destroy it
* It is worth it

**Lesson Seven Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Lesson Eight: Job in Jeopardy

The Job in Jeopardy “Best Practice” serves as a smoke alarm for organizations to take notice and take action to “save” a job before it is lost.

Look & Listen Carefully for the “sounds” of a Job in Jeopardy

You know you have a job in jeopardy when..

**Customer Driven**

* Slow to pay their bills ….. Any $ over 60 days
* Disputes / disagreements with bills
* Leasing / occupancy of building is low
* The building / property is for sale
* Dissatisfied with performance: Written or Verbal
* Extras not approved, performed by others
* New ownership of building or property
* Change in management or board
* Job up for renewal & getting outside proposals
* You notice the competition circling the job
* Customer does not match up with team member
* They go silent ….. They “Ghost” you ….
* Or they answer the question how is it going?

 Fine, just fine ………

**Company Driven**

* Job is in bad shape & requires major cleanup
* Not meeting customer expectations
* Poor or untimely follow up
* Repeat items not being completed
* Not offering solutions to their pain points
* Lack of proactive solutions or a plan
* Many changes in personnel: AMs + Foremen
* Team Member not a good match
* Inaccurate billing

**Job in Jeopardy Process**

* Conduct Training and Education on Customers
* Teach the Signs and Symptoms
* Have a Customer Centric Culture in place

**Look and Listen for the Most Common Symptoms**

* Survey Says: poor ratings or no response
* Walkthrough Feedback
* Letter / e-mail / text / v-mail / yelp from customer
* AR greater than 60 days
* Quality is below standard



Lesson Eight: Job in Jeopardy (continued)

**Declaring a Job in Jeopardy**

* Establish a Job in Jeopardy **Alarm** System
* Conduct a regular internal customer check up
* Rate each job: **RED – YELLOW – GREEN**
* When a Sign or Symptom appears sound the alarm!
* Can be declared by: Ownership, Leadership, Account Managers,Office Manager, Supervisors, Sales, Foremen

**Once the Job in Jeopardy Alarm has been sounded**

* Assign a point person or co-captains
* Alert ownership / leadership of situation
* Find out ALL of the facts internally then client

 Next …….

**Personally meet with the customer**

* Get clarity on the expectations
* Determine if these are our responsibility
* Agree on solution and time frame and cost if warranted

Next ……

* Develop an action plan, review with team, get feedback
* Decide if this is the best solution
* Take immediate action where appropriate

Next ……And Finally ….

* Keep Client informed & involved along the way
* Get verification on progress, meeting their expectations
* Document in writing, photos , video & keep on file

**Now Ask Yourselves**

* Have you ever had any job in jeopardy? Any right now?
* What’s being done about it?
* How could this have been prevented?

**Action Steps**

* Take a good look at your top 10-15 Jobs
* Rate each job: **RED** – **YELLOW** – **GREEN**

Now use this lesson!

**Lesson Eight Notes**

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How to Build Fiercely Loyal Clients

Lesson Nine: Lost Job Autopsy

**You lost the job!**

* It will happen
* Use it as an educational opportunity
* Make the systemic changes needed to prevent it from happening again

**Key aspects to review**

* What is the history of the job?
* How did the job start-up go?
* Review the personnel on the job
* Were changes made to the contract?
* Who was in charge of customer relations?
* How was the billing process?
* Were there signs? Did we miss them?
* How was the job turned over?
* Analyze the company that took over the job
* Any collateral damage?

**Turning a negative into a positive**

* Find the root causes
* Determine what systems and process need to be adjusted
* What training needs to be adjusted or added?
* How can we prevent this from happening again?

**Feeling sorry for yourself won’t help anything!**

**Lesson Nine Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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How to Build Fiercely Loyal Clients

Lesson Ten: Rating – Ranking - Renewals

**Renewal Basics**

* Consider Renewal Process at Start of Job
* Review Agreement / Contract
* Know the Contract Anniversary Date
* Know the Client’s Budget / Fiscal Year
* Learn Their Process

**Know the 4 Keys to Renewal Success**

Relationships + Performance + Competitive + Profit

**Key #1 - Relationships**

* Built on Trust and Likability
* Have their Best Interest in Mind
* Relationships Often Trump Performance

**Key #2 - Performance**

* Perform Consistently
* Know their “Hot Buttons”
* Meet and Exceed Expectations
* Manage Expectations

**Key #3 - Competitive**

* Not Everything is Based on Price
* Still Need to be Competitive
* Be 10% -15% With Like Competitor
* Relationship + Performance is GOOD

**Key #4 - Profit!**

* Profit is NOT a Four-Letter Word! - Ultimately, We Exist to Make a Fair PROFIT!
* Good Clients Understand . . .a Profitable Partner is a Good Partner

**Setting the Table for Renewal**

* Create and Execute a ***“TIGHT”*** New Job Start-Up Process
* Create and Use a Rotation Map and Work-Flow Process
* Track Direct Costs Accurately
* Get Lots of Photos – Lots and Lots!
* Don’t be a Nickel and Dimer
* Track the Freebies
* Jump on the Opportunities!
* Oops! We forgot something!
* Have Good Documentation
* Provide Master Plans with Budgets: Enhancements, Tree Management, Water Management
* Change Happens! Beware and Be Prepared.

**Lesson Ten Notes**

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Lesson Ten: Rating – Ranking – Renewals (continued)

**Stand Back and Take a Good Look**

* Review ALL Existing Jobs
* Once Per Year + Within 90 days of Renewal
* Review ALL Existing Jobs
* List in Descending Order Large to Small
* Sort Winners and Losers: Rank A – B – C
* Sort Winners and Losers: Gross Margins Solo & With Extras, Are There Extras? How many? %?
* Pain Points – High / Low?
* Can be Used for Marketing: Referrals – References - Testimonials
* Can Lead to More Jobs
* Lessons Learned
* If GM is Low . . Discover the Root Cause and Root it OUT**!**
* If Gross Margin is Low, ASK Why? 1. Haws: Hourly Average Wage Right? 2. Estimate Accurate?

 3. Markup – Pricing 4. Execution?

* If GM High . . . BEWARE!

**Form Your Game Plan**

Sort A – B – C

Decide Approach - Assign Champion

**Exhaust the Cost Side First:**

* KYC - KYC - KYC: Know Your Costs!
* Do We Really Know How Much It Cost? Is This Cost ACCURATE and Current?
* Look at Job – Are We Efficient?
* Routing-Travel Time-Sequencing -Loading and Unloading
* Accurate and Up-to-Date HAWs
* Mistakes or Inaccurate Timecards

**Consider the Revenue Side**

* Get New and More Revenue
* With Landscape Enhancements
* Irrigation Repair – Upgrades – Retrofit
* Planting – Flowers – Retrofit – Sustainability
* Sub-Contracting – Outsourcing
* Add-On Services Water Management
* Plant Health Care – Spray and Deep Root Feeding
* Tree Pruning – Removals – Planting
* Interior Plantscaping
* Snow Services

**And finally . . .a renewal with an INCREASE! (Or Price “Adjustment”)**

**Lesson Ten Notes**

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Lesson Ten: Rating – Ranking – Renewals (continued)

**Go for the Increase**

* Select Jobs Needing Price Increases
* Get Key “On the Ground” People Involved
* Lose the Losers; Start w/Smaller Jobs
* Review A – B Jobs

Determine Sequencing and Strategy

Know the Timing – Renewal Time

Build Schedule and Assign Champs

* Don’t Go After ALL the Jobs at Once
* Know the “Best Time” to Go After an Increase
* Have the Relationship in GOOD Shape!
* Decide Best Person to Be on Point
* Make Certain Job is in Good Shape
* Know Their Process
* Know Their Financial Condition
* Was There Any Change in Scope of Work? Add More – Made Less
* Know Your Walk Away Point
* Meet Face-to-Face – Get Verbal Agreement
* Be Prepared with the Facts/Info
* Be Prepared for Common Pushbacks
* Have Plan “B” Options Available; Maybe Scope Change
* Craft a Well-Written Letter to Confirm

**Consider Moving On**

* Beware of Collateral Damage
* Get Any AR Issues Resolved BEFORE Leaving
* Photo and/or Video Documentation
* Have a Sign-Off Letter Process
* Be Professional – Positive….You Never Know

**Don’t be Afraid!**

**Lesson Ten Notes**

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How to Build Fiercely Loyal Clients: Overview

**Exercise**

* What Areas Did You Affirm?
* What New Ideas Will You be Using?
* What Are the Three Takeaways for You?
* What 1-3 Lessons will be your focus?
* How Will You Retain 100% of Your Key Customers?

**Rate the following areas 1-5:**

 ◊ Build a Customer Centric Culture \_\_\_\_\_

 ◊ Getting Off to the Right Start: All Aboard! \_\_\_\_\_

 ◊ Know Thy Customer \_\_\_\_\_

 ◊ Managing Expectations \_\_\_\_\_

 ◊ Building & Growing Relationships \_\_\_\_\_

 ◊ Customer Touch Points \_\_\_\_\_

 ◊ Conflict Resolution \_\_\_\_\_

 ◊ Jobs in Jeopardy \_\_\_\_\_

 ◊ Lost Job Autopsy \_\_\_\_\_

 ◊ Rating – Ranking – Renewal \_\_\_\_\_

 Yikes! Danger Needs Work Good Great Shape

 0 - 29 30-34 35- 39 40-44 45-50