

# Increase Customer Retention

## Developing your 90 Day Contact Plan

### Purpose:

To establish a systematic methodology for maintaining contact with a large client base.

### Rules:

1. Minimum contact period for all clients and prospects on our database is 90 days, i.e. a quality contact 4 times per annum. 90 days is not negotiable.
2. Need a listing (database) of all clients (and prospects, if appropriate).
3. Contact Plan must be converted to a system and applied systematically at all levels in the business to be successful.

### Step 1

Develop criteria for sorting and categorising clients and prospects.

### Step 2

Develop a Contact Matrix. Determine the potential Contact Activities and cross-reference to each category. Reference should be the frequency of contact for this client or prospect and this activity. E.g. All contacts will get a quarterly newsletter. A Class clients will get monthly visits, etc. (See page 2 for an example).

### Step 3

Apply criteria to the databases. Sort clients and prospects into categories.

## Step 4

Establish systems to ensure that the program is implemented.

## Outputs:

1. Client & Prospect Sorting Criteria
2. Contact Plan by category and activity
3. Segmented database of clients and/or prospects
4. Contact Systems

## Contact Menu Items

**1. Book.** Buy a book that is relevant to the contact. Write in the book a comment like, 'Mary, hope you enjoy this book as much as I did. You need to read page 47, it has an interesting message for you.' Follow them up to see what their reaction is, maybe even then refer them to yet another page.

**2. Coffee.** Invite them to have a coffee but with a specific agenda in mind. Options for this include, 'I have done a plan for your business, and I want to walk you through it,' or 'I have some ideas for how you could generate an additional 200k of profit,' or even, 'I need to talk to you about a wild idea I have for you.'

**3. Newsletter.** Produce a regular newsletter and send it to them.

**4. Events.** Run regular topical events and send them an invitation to attend.

**5. Presentations.** Every time you run an event, record yourself doing a quick 3-4 minute summary of the presentation, upload it to a social media site such as [www.youtube.com](http://www.youtube.com) and send that link to everyone who attended, as well as all those invited but did not attend.

**6. Cameo video presentations.** Produce short videos on a range of issues, upload them to [www.youtube.com](http://www.youtube.com) and send a link out in an email. Topics can include, profit improvement, growth, waste, process improvement, risk reduction, maximising the value of your business, etc.

**7. Email.** Send an 'opportunity for you' email. It could be an introduction to a potential customer or employee, a business idea, activity of a competitor, or feedback on their business, etc. Why not do a force field, FMEA, one page plan on that contact, and then send it to them to demonstrate your point of difference.

**8. Twitter.** Encourage contacts to follow you on Twitter and ensure you use this as a distribution channel for content and thoughts you write. Ensure you stay congruent in your messages to your target market and potentially link up other social media tools such as LinkedIn to your Twitter account to further distribute your content.

**9. Mail.** Send out an article from a magazine, journal or the web.

**10. Be my guest.** Invite them to a sporting event, relevant meeting, networking or training event.

**11. Research meeting.** Why not ask your contact if you can meet up with them, to pick their brain about their industry or profession, as your business wants to be better informed about the industry trends? You will get amazing insights and even hot leads from such a meeting.

**12. Blog.** Consider maintaining a blog that contains articles you write on hot topics. Invite contacts to join the Blog or send out a link each time you write something.



Customers	A	B	C	Previous Clients	Prospects	Leads	Influential People / Marketing
	Annual	Retainer	Monthly				
Newsletter	Q	Q	Q	Q	Q	Q	6m
Phone Call	F	F					
Visit	M	M	M			6m	
Gifts	Y	Y					
Christmas Cards	Y	Y	Y	Y	Y		Y
Blog Article/ Video	M	M	M	M	W	M	M
Intro to Target Market	M	Q	Q	6m	W	W	M

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## Developing your 90 Day Contact Plan

### **1. Create a 90-day Contact Plan for your Customers**

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### **2. Call 3 of your best customers today**

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