

Clientele Overload Work Book

The Helpful guide

Authored by: Stephen Thompson

Table of Contents

Table of Contents 2

Intro..... 5

So Let’s Get Started**Error! Bookmark not defined.**

Just Beginning..... 5

 Fresh out, what to do next..... 5

Back to Basics..... 12

 Shop & Professional Rules 12

 Know Your- Psychological Self, and Personal Goals 14

 Know Your Finances 22

 Know Your Time 25

 Customer Satisfaction 27

 Customer Interaction..... 28

Marketing Best Practices 28

 Advertising..... 28

 Business Card Basics 30

 Build a Website..... 32

 Social Media 34

 Discounts..... 37

 Customer Follow Up..... 40

 Referrals 40

Clientele Overload Workbook

Become a Guru	42
Owners and Experts	43
Improve Professional Skills	43
Building Teams	44
Worker Satisfaction	45
Build a Brand	46
Automation	48

Book Tables

Tables

Table 1: Future Goals..... 6

Table 2: Achievements & Compliments..... 7

Table 3: Shop Prospects..... 9

Table 4: Overcoming Fears..... 15

Table 5: Overcoming Weakness 16

Table 6: Major Goals 19

Table 7: Strengths 20

Table 8: Mentors 21

Table 9: Resolving Mistakes..... 22

Table 10: Window of Productivity 26

Table 11: Unproductive Activities..... 27

Table 12: Prioritizing Tasks..... 26

Table 13: Stand Out 27

Table 14: Target Market 29

Table 15: Business Card Distribution Tracker..... 32

Table 16: Social Media Purpose 34

Table 17: Social Media Daily Tracker..... 35

Table 18: Identify Competition..... 36

Table 19: Gross Margin & Gross Profit..... 38

Table 20: Promotion Success Tracker 38

Table 21: Customer Information..... 40

Table 22: Know Your Skills 42

Intro

This is the workbook that was created to compliment the Clientele Overload book. Utilize this book while you are reading and working your way through the book. If you actually do the exercises you will increase the probability for success significantly.

Just Beginning

Fresh out, what to do next

1. Create a resume to provide to shop owners before you graduate. Resume examples and links can be found under the resource tab at www.gettheclient.com.
2. Post your resume to specific hair stylist or barber sites. As a newcomer you will not be able to show the vast amount of experience you have. However, you can show that you have a strategy to grow your clients and help your future boss see a profit (**you can download some very helpful resources to help with this from www.gettheclient.com**)

3. Know your career goal for the next month (Table 1)Table 1: Future Goals
4. Know your career goal for the next 6 months. (Table 1)Table 1: Future Goals
5. Know your goal for the next year. (Table 1)Table 1: Future Goals

Table 1: Future Goals

where you see yourself in the next :	Description
1 month	
6 months	
1yr	

Get in the door- What to do to get in

Know the salon that you are interviewing at. What is the name of the location; who is the owner; manager; and receptionist? (Table 3)

- 7. Make a list of the top five areas where you would like to work. (Rank them from most desired to least desired)

Example

Priority	City	State
<i>1</i>	<i>Chicago</i>	<i>Illinois</i>

Fill in the table below:

Priority	City	State
1		
2		
3		
4		
5		

- 8. Make a list of the top 10 locations you would like to work at within the areas that you selected. (Rank them from most desired to least desired) Then go for your lists fro

Clientele Overload Workbook

9. Introduce yourself to the shop owners. Let owners know when you will be graduating and that you are interested in working with them. Get their name and contact information (business card) so you can follow up with them later.
10. Inquire as to what they are looking for in an employee or contractor. What are the top five most sought after qualities they look for in new employees or contractors?

Table 3: Shop Prospects

New location Prospecting Chart

New location Prospecting Chart						
1	Company Name	Location	Owner	Manager	Receptionist	
2						
3						
4						
5						
6						
7						
8						
9						
10						

1. Dress for success –The proper attire for an interview should always be business professional, even if you will never wear a suit for the position. People appreciate the fact that you would rather be over-prepared than under-prepared. It is suggested by one of the writers from Monster.com that you should always dress one or two levels above the interviewer (Peterson, 2016). If you Google professional dress you will see more examples than I can list here.
2. Know what you are looking for; Commission (booth rental or customer percentage) or employee (W-2)?
5. Prepare to present yourself.
 - ✓ Complete a resume (spell checked).
 - ✓ Completed an application if it is available.
 - ✓ Put together a professional portfolio of your work, if possible. Student photographers offer cheap/free services for the experience. Go to your local college and recruit some photographers who are looking for the experience. (**Corey, R. Interview**)
6. Ask for an interview

Before the interview:

1. Let me restate: Dress PROFESSIONALLY.
2. Call the day before the interview to confirm the time.

Clientele Overload Workbook

3. Don't wear perfume or cologne, and if you must, then just a hint (only enough that a person would only smell you if they hugged you)
4. Get your hair done and be clean when you walk through the door. If you look good, you will feel good and your attitude will be more positive.

During the interview:

1. Be upbeat and smile. Relax and enjoy yourself. Be you, but PLEASE remember to be professional.
2. Introduce yourself and talk a little about your background, why you like the field as well as why you chose the location for which you applied.
3. Answer questions truthfully, and professionally.
4. Don't eat candy or chew gum during the interview. If you're worried about bad breath; use mouthwash before you go in.
5. Speak clearly and professionally.
6. If you work commission or rent, it's good to offer the salon a game plan to achieving your goals and ideas for growth and marketing. (This workbook is an excellent way to highlight some of the steps you will take accomplish this.) Understand that owners like people who are willing to get up and go find clients to grow their business. More business for you means money for them.

After the interview:

1. Send a follow-up e-mail after the interview. In the email, you should be thanking the owner/interviewer for the opportunity. Try to give a compliment to the shop, and or reference a piece of memorable conversation. Tell them you look forward to hearing from them.

2. Consider writing a hand written thank you note to the person who interviewed you. It always will be received as more personal and heartfelt than an e-mail.
3. Follow up with the interviewer about once a week to keep your interview fresh on their minds.

Back to Basics

Shop & Professional Rules

Pick your rules. I have supplied a list of some of the best rules I have encountered in a variety of shops, along with a list of personal rules you should try to include into your day-to-day business practices. Review the choices and get your own set of rules.

- No swearing at all, not even if the client is swearing.
- No answering phones when you have a customer (unless it's an emergency).
- Do not talk down or belittle your clients. Your clients are just that, they are not your children and some may be okay with it. Others will find another place to go.
- Greet all clients with a handshake, or a friendly hello.
- Do NOT talk about your personal issues inside the shop. Honestly, most people come to talk about themselves, not to hear about your life. While it's true that we are all human, make an effort to be tasteful. It may be tempting to discuss personal matters about your life, but keep in mind that you want to be seen as professional.
- Do not stop working on a client for minor interruptions. Such as to address or watch something on TV.

Clientele Overload Workbook

- Keep your area clean. Your place of business is a reflection of you. A Messy area screams “I will do poor work.”
- Clean your tools after each client. If you can clean in front of them, that’s even better. Have examples of your work for your clients to look at. Showcase your work and make it easier for clients to get ideas when they don’t know what they want.
- . No gossiping! Do not talk badly about other clients, or co-workers. You will quickly lose the respect of clients and co-workers by doing so. If you wouldn’t say it directly to the person you are gossiping about, you should save it for your mental dialogue.
- Keep yourself clean and look professional. People don’t want to deal with those who cannot keep up with themselves. You are your own canvas; show off your skills.
- Don’t eat in front of the client. As challenging as it is, keep your meals and your work space separate.
- Have patience with your clients. Not everyone you deal with will be pleasant. Do your best to keep them happy, until the service is done. At that point, you can determine if you want to do business with them again.
- Let customers know if you are not capable or skilled enough to perform their request. Please be polite. If you have people in your shop who are able to perform the service, let them assist you while you watch.
- Do not hide in the break room when you have no clients. Keep busy, whether it is practicing cuts, cleaning your area, or marketing your services.

Clientele Overload Workbook

- Make an effort to control your conversation topics their appropriateness in the shop..
- Take your time with your clients and do the best job you can. However, do not work so slowly that you inconvenience your client.
- Listen, Listen, Listen. Make sure you understand your client's request. Then repeat what they are requesting and make sure they agree. Do not cut your client off when they are speaking. Allow them to finish their point.
- Your clothing should reflect current fashion trends. If in doubt, check with a team member.
- Please have hair and makeup done before you clock in. Don't use the shop as a personal dress up location.
- Call if you are running late. That includes your boss/owner and your clients.
- Don't overbook. Know how long your services will take and schedule appointments accordingly. This point is extremely important! You will lose more clients by having them wait because of your inability to schedule people.
- Be a team player, and help other members when you can. When you have a team that you can rely on, the work environment becomes very productive.

Know Your- Psychological Self, and Personal Goals

Clientele Overload Workbook

Write out your fears. Then write out your solutions to overcome your fear.(Table 4) Write at least one solution to all your fears. If you can write down more than one, do it. (i.e. I will pick up a part time job while I grow my clients)

Table 4: Overcoming Fears

#	Fears	How will you overcome your fear?
1	<i>I'm afraid of not being able to provide for my family.</i>	<i>By selling things I make on EBay.</i>
2		
3		
4		
5		

Clientele Overload Workbook

1. Write out your weaknesses. Then write a possible solution to that weakness, and finally the status of improving that weakness. (Table 5) This will assist you by consciously and subconsciously addressing a way out of any excuses that you can make for yourself to not be successful. Now when you start to question yourself and your abilities, you will find that your own insecurities have solutions.

Table 5: Overcoming Weakness

what are your weaknesses	Solution	Status (solved/pending)
<i>I'm not great at communicating.</i>	<i>Take public speaking classes.</i>	<i>Solved</i>

Clientele Overload Workbook

6. Write down your accomplishments.

Write down what you have already accomplished and keep this list with you. When you need an ego boost, pull it out to remind yourself. Don't worry if you feel that the accomplishment is not significant. The fact that you have woken up today is a great start to this list. As time progresses, you can build this list, but you need to write down as many things that come to your mind as you possibly can. Nothing is off limits. It's important to know what you are capable of, as well as what you bring to the table.

Your Accomplishments
<i>I graduated from cosmetology school.</i>

7. Write down all of the goals that you want to accomplish. If you can get pictures of what you want, that can be a great way to help motivate you and get a visual of what you really want. On this step, it is not enough to put general goals, such as, “I want to be successful.” You need to be specific and one of the best ways to do that is to use the S.M.A.R.T method.

a. SMART goals method. (Table 6)

- i. **Specific goal**- be specific in your goal; the more detail, the better.
- ii. **Measurable**- set goals that can be measured so you can see your progress.
- iii. **Attainable**-try to find goals that can be achieved. Don’t be afraid to list all your goals; just prioritize those goals to allow the smaller ones to build into the most challenging goals. (An example of this would be the goal of “I want to be

a millionaire.” Well, it would be smart to prioritize: “I want to run my own business” in front of this goal)

- iv. **Relevant-** prioritize goals that are more in tune with where you want your life to go.
- v. **Time Bound-** give yourself an end date. That way you push harder for that goal.

b. Create a plan of action for each one of your goals to be accomplished.

- You may not be able to get a plan of action for each one yet, and that is okay. Your mind will continue to work on that for you. When it comes to you, write it down, and then work the crap out of it. You may also want to take a little time and research some of the ways others have obtained that goal. It is pretty common to find that there is someone out there who has attempted and achieved what you are striving for, so it’s worth doing a Google search.

Table 6: Major Goals

Major Goals	Plan of Action to Achieve the Goal
<i>Open my own shop.</i>	<i>Save \$10,000 for a down payment on a location.</i>

10. List your Strengths

- a. Get a list of the things that you are good at. Even if it includes activities such as blowing bubbles and watching birds. 9 times out of 10, you probably have a skill that you can feel confident in, so list it. Use your strengths to help you achieve your goals. If you happen to be good at talking to people, for example, then you should be doing a lot of that to push towards your goals. Use your strengths to your benefit.

(Table 7)

Table 7: Strengths

What are your strengths	How can it help you in business
<i>Hard worker</i>	<i>Allow me to overcome tough tasks.</i>

- 12. Find people that are doing what you want to do and make them your new mentors and associates. (Table 8)

Clientele Overload Workbook

- a. Mimic what these people do. They are doing what you want to do, so learn from them and incorporate it into your life.
- b. Research the person, or if you have direct access to them, ask them if they will help you to achieve what they have already done.

Table 8: Mentors

Mentors name	role/Title	Telephone	e-mail
<i>John Dollar</i>	<i>CEO</i>	<i>555-123-4567</i>	<i>example@notreal.org</i>

13. Lessons learned

Learn from your mistakes, and don't repeat them. Jazz great Miles Davis once said, "When you hit a wrong note, it's the next note that makes it good or bad." It is a very well-known practice in many successful businesses and projects, to review the lessons learned. Identify what went good, bad, and what could be improved, and how to do so going forward. (Table 9)

Table 9: Resolving Mistakes

Big Mistakes that you have made	The lesson(s) that you learned
<i>Took out too many credit cards and ruined my credit.</i>	<i>Spend wisely and keep a close eye on your credit.</i>

Know Your Finances

List all of your current expenses and income.

Expenses	Costs
Giving	
Tithing	
Offerings	
Charities	
Other Giving activities	
Food	
Groceries	
Restaurante	
Pet Food/ Treats	
Shelter	
Mortgage	

Clientele Overload Workbook

Rent	
Property Taxes	
Household Repairs	
HOA Dues	
Utilities	
Electricity	
Heating	
Power	
Phones	
Cable	
Internet	
Water	
Sewage	
Gas	
Clothing	
Children's Clothing	
Adults Clothing	
Transportation	
Car Payment	
Fuel	
Tires	
Oil Changes	
Maintenance	
Parking Fees	
Repairs	
DMV Fees	
Bus Fair	
Train Fair	
Medical	
Primary Care	
Dental Care	
Specialty care (Orthodontics..etc)	
Medications	
Medical devices	
Medical Payments	
Insurance	
Health Insurance	
Homeowner's Insurance	
Renyer's Insurance	
auto Insurance	
Life Insruance	

Clientele Overload Workbook

Disability Insurance	
Identity Theft Protection	
Long term Care Insurance	
Household Items/ Supplies	
Toiletries	
Laundry Detergent	
Dishwasher Detergent	
Cleaning Supplies	
Tools	
Personal	
Gym Membership	
Hair Cuts	
Salon services	
Cosmetics	
Babysitter	
Child Support	
Alimony	
Subscriptions	
Other	
Debt Reduction	
Mortgage	
Credit Card	
Personal Loan	
Student Loan	
Retirement	
Financial Planning	
Investing	
Education	
Financial Coacghing	
Childrens's College	
Your College	
School Supplies	
Books	
Conferences	
Savings	
Emergency Fund	
Hill and Valley Fund	
Other Savings	
Gifts	
Birthday	
Anniversary	

Clientele Overload Workbook

Wedding	
Christmas	
Special Occasion	
Fun Money	
Entertainment	
Games	
Eating out	
Spontaneous Giving	
Vacations	
Subscriptions	
INCOME	
Job	
Business	
Other	
Final Numbers	
Net Income (Income-Expenses)	

Once you have filled out your worksheet with your numbers, you will have a much clearer picture of your financial situation. You can find a downloadable Excel spreadsheet for tracking expenses under the resource site on www.gettheclinet.com

Know Your Time

One of the most important things to keep in mind is management of your time. How much time do you have to dedicate to building your clientele? Are you using your time wisely? These are just a few important questions that we need to be asking ourselves

1. Figure out what part of the day you are most productive and put only your most important activities inside this time frame. (Table 10)"

Table 10: Window of Productivity

Start Time	Finish Time

2. Take the first 30 minutes of every day to plan your day. Don't start your day until you complete your time plan
3. Make sure to include breaks and activities that make you happy in your schedule.
4. Give your most important tasks deadlines that need to be met.
5. Track the time that you spend daily doing activities

You can find downloadable daily and weekly planners for free at.

<http://scatteredquirrel.com>

6. Prioritize your tasks. What things need to be done first? The really important things.

Table 111: Prioritizing Tasks

List of all your daily activities	Priority (Rank from 1-5)	Category (Entertainment, business, etc..)

7. Remove meaningless tasks from your day. Analyze if a task really needs to be part of your day. Does it have a significant impact on your success or happiness? If not, get rid of it.

Table 122: Unproductive Activities

Useless and unproductive activities	Time you spend on them daily	alternative productive activity
<i>Watched funny videos on Facebook</i>	<i>2 hours</i>	<i>Post helpful information to my Facebook business page.</i>

- Remember to give tasks at least a 20 minute window of effort, instead of jumping from one task to another every minute.

Customer Satisfaction

Set the bar high and keep your customer satisfied as if your livelihood depended on it, because it does. Make a list of things that make your business or service different or special from everyone else's.

Table 13: Stand Out

What about you or your business makes you different?

Customer Interaction

Set a good example for your place of business. How can you make your customers Experience Amazing? List your ideas to create the best customer experience clients will ever have.

Marketing Best Practices

Advertising

Like anything else in business, it's a good idea to make a plan to achieve success. This should include a list of tools and activities that will be used to make the public aware of your unknown services and or product. Fill out the advertising plan template below. This will help you to identify some important factors that you need to be aware of in order to make your plan for winning new customers work.

Advertising Steps

1. Identify you customer Demographics. Take some time to fill in categories in the table below. Make a good effort to understand as much about your customer as possible. Once you understand your customer, you can focus on how to get their business much more effectively.(Table 14)

Table 14: Target Market

Target market info	Description
Age Range	
Ethnicity	
Average Income	
Where can you find them?	
Gender	
Parental Status	
Education	

4. Create a budget. It's important to know how much money you would be willing to spend in order to promote yourself or product. Use the results from the expense worksheet under the know your finances section of this book. It will help to give you a very clear idea of what money is available to use.
5. Create a website.
5. Create social media platforms that you can use to keep in touch with your clients.
6. Business cards, post cards, flyers. You should always keep business cards on you.
7. Attend meetings, groups, and shows that attract your customers and or your competition.
8. Build your brand and distinguish yourself and services from the rest.
9. Write articles about your area of expertise for your potential clients (i.e. barber topics for healthy hair) to build your credibility. This may not be easy for everyone, but when you offer helpful information to people, they are appreciative. If they are in the area, they may seek you out to do business with.

10. Do public speaking at functions to build credibility. This is a bit more challenging, but it is extremely effective at making you the expert in the public eye. I think we can agree that people will go out of their way to do business with an expert.
11. Hold promotions and discounts to get your business out there. This is a good idea to spark interests, but if it is not done properly, it can backfire. We will talk more on this later in the book.
12. Track results and focus on what works. This is just as important as advertising itself. Understanding what is working and what needs to be left alone is essential. If it does not work, you should not waste additional time or money on it.

Advertising includes many different activities, but the most important thing is to have a plan and a goal in mind that you can strive for. A plan can always be changed, but without one you will have no idea where you are headed.

Business Card Basics

Here are a few best practices for designing a business card.

Design your business card checklist:

- ✓ Have a goal for your business card. What is the reason you are creating the card?

Place answer here.)

2. Provide important information.

- ✓ your name:
- ✓ occupation:
- ✓ contact numbers:

Clientele Overload Workbook

- ✓ e-mail:
 - ✓ location:
 - ✓ Favorite social media site:
3. Use the Back of the card. Provide something special that will make the card hard to throw away.
 4. Don't use cheap paper
 5. Use standard sized business cards.
 6. A catchy phrase:
 7. Color:
 8. Design:
 9. Is the card Cluttered?
 10. What does your business do:
 11. Check for errors. Do a quick Google search for the best business card designs. This will give you some great examples that you can build from.

The Art of the Pass:

1. Hand your business card out. Set a distribution goal. Set a goal for the amount of cards you want to pass out daily and force yourself to hit it. The more cards; the more business.
(Table 15)

Table 15: Business Card Distribution Tracker

Date	Hand Out Goal Qty.	Actual Qty. Handed Out	Success or Short

(A larger version of this can be found in the free workbook at www.gettheclient.com)

Build a Website

. Below are steps to guide you on building your website;

1. Choose a platform that you want to build your website with.
 - a. There are a few choices out there, such as WordPress, Weebly, Drupal, Joomla, etc...
2. Choose a website domain name www.ac123me.com. You will need to check the domain name for availability, this can be done for free at godaddy.com
3. Select a host for your website. Some examples would be Bluehost.com, Godaddy.com, and Ipage.com
4. Design your webpage.
 - a. The platforms like Weebly.com are user friendly will allow you to design a site with little effort.
4. Allow for credit card transactions. This is usually a built in feature on the development site you choose (i.e. Weebly.com).
5. Build your website popularity on search engines.

- a. This is called search engine optimization (SEO). By placing the right words on your site; placing links on other websites back to your own website; even writing articles are all great ways to build your rank on Google. If you're interested in this subject you can download the helpful PDF about SEO located under the resources tab on www.gettheclient.com.

1. HOW TO SEO

Social Media

The following steps will help to get started with your own social media marketing.

1. The first step will be to get set up on the social media platforms.

The top social media sites to join are Facebook, Twitter, Instagram, Google+, LinkedIn, and Pinterest. Given time there will probably be dozens more, but as of 2016 those are the top social media platforms.

Each of the previously mentioned platforms has its own personal uniqueness on how people use it. Therefore, become familiar with the way information is communicated on the platform, and make the necessary modifications to your message for maximum success. When you have an understanding that social media is important to a business, you are on the right track, but it's literally the first step.

2. The next step is to create a **social media marketing strategy**. Fill out the tables below and it will help you to capture your strategy.

Table 16: Social Media Purpose

What is your purpose for using social media?

3. Measure your results

Table 17: Social Media Daily Tracker

Date	Facebook likes	Twitter followers	Instagram follower	Google+ connections	LinkedIn Connections
1/2/2020	100	43	3	24	12

4. What is your Handle: Create consistent handles, or business names (i.e. “JohnDoeThePro”) and mottos throughout each social network platform. If you always use this same “handle”, it makes it easy for people to find you on various sites.
5. Photo consistency is important as well. Use the same profile photo, personal picture, or logo for easy recognition and people's ability to follow you. This media content should be consistent across all social media platforms (i.e. Facebook and Twitter).
6. Personal information vs. Business information. Keep personal social media away from your business social media.
7. Know your target customer. Find their hangouts on the social media sites.
8. studying your competition you will be able to gain insight into what clients and customers are interested in following.

Clientele Overload Workbook

Table 18: Identify Competition

Competition's Name	Location	website	Facebook	Twitter	Instagram	Google +	LinkedIn	What special thing are they doing that you are not?

Discounts

Steps to Discounting:

In order to get your discounting under control, you need to understand what you should be looking at. There are a few numbers that you will need to understand.

1. Know your gross margin and gross profit. (A Gross Margin and Profit tool is available for free!! at www.gettheclient.com/resources)

Definition:

Gross margin is money left for you after subtracting the cost of the goods sold (how much it cost to do business) from the net sales (money left after costs are taken out) and can be a dollar value (gross profit). For example, you charge \$20 for a haircut and you can do one haircut per hour. You have to pay \$75 a day to rent the booth. You work 8 hours, so you split \$75 by 8 or $75/8 = \$9.38$ is your hourly cost. So let's tie it all together $\$20 - (\$75/\text{booth cost}/8\text{hrs} = 9.38) = \$20 - \$9.38 = \mathbf{\$10.62 \text{ gross profit per cut}}$

2. Know your Gross Margin = $(\$10.62 \text{ gross profit}/\$20 \text{ haircut}) * 100 = 53\%$ or $(10.62/20) * 100 = 53\%$
3. Know what your goal should be if you are discounting. The following table can be used once you know your gross profit and margin. It can be used to know if the discount is a success by calculating the desired increase in sales volume for your advertised discount. For example if our profit margin was 40% and cut our prices by 15%, then you should have an increase in clients by 60%. That means that your 1 person per hour which is 8 in a day, will increase by 60%. $(8 * 60\%) = 4.8$, so we should get 4.8 more customers which is the regular $8 + 4.8 = 10.8$ (or 11 since you won't see a half person....I hope). If you get 11 or

more the discount was success, less than 11 it was not a success. A larger version of the table and an automated tool can be found under the resource tab at www.gettheclient.com.

(Table 19)

Table 19: Gross Margin & Gross Profit

If you cut your prices by...	and your present gross margin (%) is...							Amount Sales volumes should increase
	0%	15%	20%	25%	30%	35%	40%	
5%		50.00%	33.30%	25.00%	20.00%	16.70%	14.30%	
6%	150.00%	66.70%	42.90%	31.60%	25.00%	20.70%	17.60%	
8%	400.00%	114.30%	66.70%	47.10%	36.40%	29.60%	25.00%	
10%		200.00%	100.00%	66.70%	50.00%	40.00%	33.30%	
12%		400.00%	150.00%	92.30%	66.70%	52.20%	42.90%	
15%			300.00%	150.00%	100.00%	75.00%	60.00%	

Promotions

Get into the habit of constantly promoting yourself.

Table20: Promotion Success Tracker

Promotional ideas	Start Date	Start date plus 3 months	Results in sales

Clientele Overload Workbook

Customer Follow Up

So how do you follow-up? Do you pester people until they can't take it anymore? Yes and no. There is an art to following up and this will make you less squeamish about contacting your customer or future customer. Before we travel down this path, I have to make you aware that you must be making a great effort to gather people's information at every chance you get. That means the phone number is just as important as the e-mail address, and will be extremely important for your ability to follow-up (Table 21). A downloadable version is available on www.gettheclinet.com under resources.

Table 21: Customer Information

Name	e-mail	Phone	Facebook	twitter

(Standard information to capture)

Referrals

Asking for referrals is a science but before you ask, there are a few requirements that you must satisfy to be worthy of the referral:

Referral Success Steps:

1. Write a list of all your satisfied customers
 - a. Customers: These are your biggest assets, they love your product and they know how well you take care of them.

Customer's Name	Purchase Date	Purchase Item

Clientele Overload Workbook

- b. Give customers a referral card.
 - c. Send customers a referral letter asking for them to send clients.
2. List all the Complimentary services that you can think of: other people or businesses that offer different services, but have the same clients. An example would be a barber and a shoe shine service, or a shoe manufacturer and a sock manufacturer. It's probably safe to say that they will both have the same client, but they don't directly compete. If you can convince these partners to refer you services to their clients in exchange for you doing the same, the referrals will come by the droves.
- i. Find all the local services and let them know you're building a referral program and would like to be able to refer people to them. Then you can ask them for referrals from their company.
 - ii. Gather their contact information

Company type	Company Name	Point of contact	Contact info.
<i>Comb company</i>	<i>Combs 4 days</i>	<i>Mr. combs</i>	<i>555-555-3356</i>

3. List all of your Close individuals who you can inform about what you do. The people who you deal with on a regular basis. Friends, family, neighbors etc.

Person Name	Relationship	Point of contact	Contact info.
<i>Comb company</i>	<i>Combs 4 days</i>	<i>Mr. combs</i>	<i>555-555-3356</i>

Become a Guru

What are you good at? Skills Table (write down your top skills and how you can benefit from them) (Table 22)

Table 22: Know Your Skills

Skill description	How can you benefit from it?

Another great way to be seen as an expert is by getting an article written about you in a newspaper. Frequently reporters are in need of a good story and as the expert on a topic you can provide good information for them to cover. Here is a website that helps subject matter experts and reporters to locate each other. www.helpareporter.com

Owners and Experts

Improve Professional Skills

List the top 10 skills that you would like to master within your profession. Then identify how you will master them.

Skills to Master	How to Master them
<i>Marketing</i>	<i>Training</i>

Building Teams

Successful Team checklist:

1. Make a list of your desired team roles.
2. Select the right people for the roles.
3. Ensure they are the right fit for the overall team.
4. Set ground rules.
5. Set expectations.
6. Understand the team members' goals and motivators.
7. Help grow the teams to work well together.
8. Constantly look for ways to bring the team together.
9. Re-check the member's satisfaction and feeling levels periodically.

Worker Satisfaction

Read the choices below and circle those that relate to your situation.

Why do people quit their jobs?

1. They do not like their boss.
2. They do not like their co-workers.
3. Poor work environment.
4. They do not like how much they are paid.
5. They do not like the future opportunities within their company.
6. They are moving/ relocating.
7. They have conflicting schedules.
8. Bored and unchallenged by the job itself.
9. Lack of opportunity to use the skills and abilities they are trained for.
10. Micro-management environment with little trust autonomy and independence.
11. Meaningless job.
12. Organization's financial stability.
13. Lack of employee recognition and reward system (Heathfield, 2015).

Why people love their jobs?

2. They like their boss.
3. They like their co-workers.
4. They enjoy the work environment.
5. They are doing meaningful work.

Clientele Overload Workbook

6. They are appreciated.
7. They are compensated fairly.
8. They are challenged by their job.
9. There is opportunity to grow.
10. There is assistance with skill and education development.
11. Job security.

Now analyze your company to see what changes need to be made. This may not be evident to you if you are the manager or owner. The situation may require that employees assist with identifying issues.

Build a Brand

Brand building checklist

1. **Brand Strategy:** This is the first part of any branding effort. The first question you need to ask is: what do you want your brand to communicate? While companies are profit-driven many of the big companies do business for reasons other than money. To give you an example, let's look at the furniture company, IKEA. Their branding message is: "At IKEA, our vision is to create a better everyday life for many people. Our business idea supports this vision by offering a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them." This is a powerful roadmap that the company can use to guide its efforts. This captures the benefit to the customer, and that benefit results in a profit for IKEA.
2. **Factors for Building a Brand:**

3. Purpose- Why does your company exist? Is it to revolutionize the barber industry with the newest trends and styles? Or is it to give clients an experience that is unforgettable while giving them unmatched nails? Whatever the case may be, there has to be something more than making money. If you can answer the question, “why do I wake up in the morning to do this”, then you will be on the right path. If it is just for the money, then ask yourself why you want the money. If you don’t have a “WHY”, then you will not have the drive to push through the hard times.
4. Consistency- Once you have a purpose for your service, you must make sure that everything you do with your business is following that purpose. If you’re on your business Facebook page talking about a car that you like, but your purpose is to provide the trendiest haircuts, you’re not matching your purpose. Every message that you post, picture, and activity should reflect your purpose, so keep it consistent.
5. On the same page- If you have employees, it’s important that everyone is on the same page when it comes to representing your company. Give your employees the same message and requirements to communicate to the world. All your employees should know what your company stands for. When they represent you, the image should be consistent and the message should be as well. Once you know what your purpose is then make sure you make the effort to get everyone on the same page.
6. Get people emotionally involved- Find ways to get people involved in your brand. Create groups or activities that allow people to tie in experiences and emotions to your service. Have a club that people can be involved in that gives them special benefits

through discounts and experiences. Whatever the case may be, be creative and try to get a deeper connection with your clients.

7. Creativity- It is good practice to understand what your competition is doing and efforts should be done to match services and promotions. However, don't forget that you are a brand in yourself and that it is your creativity that will set you apart to the world. So, be creative and find new ways to re-invent your message and get that customer loyalty.
8. Loyalty- Find ways to build loyalty with your customers. Special thank you letters or rewards for helping you build your business. A small gesture can go a long way for people and recognition can go even further. Think of ways to show your appreciation that still follows your purpose. An example would be to offer half off a hair service when they get 3 cuts. Whatever you decide, make a real attempt at thanking clients.
9. Image-What is your image? A logo that represents you in one glance, like the Apple with a bite out of it is the Apple Company. If you see the symbol on a computer, you know immediately that is an apple product. The same should be true with your company. So this goes into the consistency lesson from before. Pick a color scheme, a logo and make sure it ties in with your purpose. Then put it on everything that represents your company. The more people see it, the more familiar they will become with your product and or service.

Automation

Automation Steps:

Clientele Overload Workbook

1. Identify the things that you do daily- make a list of all the things that you do daily, weekly, monthly, yearly.

Tasks that make you happy:

Tasks	Why (does it make you happy?)	Love scale (1-10)

Bad Tasks	Why	Hate scale (1-10)	How to eliminate task

2. Go through your list and figure out exactly what you enjoy doing off that list, as well as what you do not enjoy.
3. Separate your two lists for all the things that you like and dislike.

Clientele Overload Workbook

4. Take the dislike list and rank them from greatest to least.
5. Start at the top of the undesired list and find services, applications, or people that will do the things you would rather not. Having a budget may limit your choices.
6. Keep working towards eliminating all the undesirable tasks from your list.
7. Every month, you should review the list and see if new tasks need to be added to the list.
8. Every few months, look at the current solutions to your undesired list and see if there is a better way to get them done.

(See the free workbook under the resource tab at www.gettheclient.com for the likes & dislikes table)

Close

If you have reached this point, you have probably identified many areas of opportunity and excellence. Keep pushing for greatness, and continue to check for updates on the resource page of the website. Thanks for the support.