

C³R³X

Bar	Segment 1 (Bottom)	Segment 2	Segment 3	Segment 4	Segment 5 (Top)	Total
1	5	5	5	5	5	25
2	5	5	5	5	5	30
3	10	5	5	5	5	40
4	10	5	5	5	5	45
5	15	5	5	5	5	50
6	15	5	5	5	5	55

CUSTOMER **R**ELATIONSHIP EXPERIENCE

INCREASING **R**EVENUE, **R**EFERRALS, AND **R**ETENTION
WITH PEOPLE YOU ALREADY KNOW, LIKE, AND TRUST.

- REVENUE
- REFERRALS
- RETENTION

CRM³



- 1. SET THE BUDGET**
- 2. GATHERING INFORMATION**
- 3. GOOGLE ALERTS**
- 4. SOCIAL MEDIA**
- 5. GIFTING**
- 6. FOOD**
- 7. FACE TO FACE**
- 8. THE PHONE CALL**
- 9. EVENTS**
- 10. PERSONAL NOTES**
- 11. HOLIDAYS**
- 12. INTRODUCTIONS**

- REVENUE
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CRM³



SET THE BUDGET

Every relationship has value. In sales we focus extremely hard on our effectiveness of time and money generated.

There are several ways to determine the value (to the business) of a specific customer. In this scenario we are looking at the annual profit this particular customer brings to you or the business.

Take a percentage of the value of that customer and apply it to your customer marketing strategy EACH YEAR.

This is not an additional cost, it is meant to redirect the dollars that are already being spent "ad-hock" and utilize them in a more personalized way.

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GATHERING INFORMATION

As a business person, we understand how important it is to gather information that will allow us to build a professional relationship.

The typical things are names of spouse and children, hobbies, professional and personal goals.

The problem with that, is that EVERY person gathers that information. It is NOT a differentiator.

Here are a few ideas of information to gather:

- Favorite non-traditional holiday
- Favorite drink
- Favorite music artist

****Remember that every interaction is an opportunity to learn more****

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GOOGLE ALERTS

Gratitude and appreciation are two of the best ways you can retain talent and clients.

The simple gesture of making sure those individuals are seen, heard, and valued can be the difference of making a deal or keeping that critical individual on the team.

Problem is, we are pulled in a thousand different directions every day and simply forget to give credit where credit is due.

Enter, Google Alerts. This is your personal friend that reminds you of particular events, ideas, articles, coupons, etc to apply to any relationship you want to strengthen. This simple tool is a **GAME CHANGER**.

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SOCIAL MEDIA

Social media is a relationship tool and it **MUST** be used as such.

"But I don't know what to post." - Everyone

Tell your personal story. What challenges have you overcome? What are you going through right now? What wins have you experience? It will relate to more people than you know.

Post about it. **THEN**, respond, like, and comment.

Goals for social media:

- Determine which medium is best for you.
- Post one more post than you are today.
- Don't get caught up on metrics. Be consistent.

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GIFTING

It's important to keep in mind why we gift to someone. Consider your best friend, mother, father, or significant other. What are the best gifts you have ever given them?

Your answer to that question is most likely a heartfelt gift that was personalized and meaningful. I'm talking about the picture in the tiny locket of them with someone they love. Maybe it even brought a tear to their eye.

Gifting IS NOT about the cost of the item, nor is it about the specific time of year. It is purely about authenticity.

The best gifts aren't given because of a transaction, referral or sale

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FOOD

Obviously we would have food in this. Most people schedule their day around when they are going to eat next (myself included!).

But food is tricky. Not everyone likes the same food. Some have religious preferences and others have severe allergies. Yet, every year we send ham, turkey, bread, or chocolate to our clients!

Food can be powerful, but deal with the person on an individual level. Sending milk chocolate would be a great gesture, but if that person is lactose intolerant the IMPACT is missed.

Pro Tip: Send their kid or spouse their favorite dessert.

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FACE TO FACE

THE #1 INFLUENTIAL ZONE.

This is where you get to dive deep. This isn't at the office cubical or the conference room. Not even the golf course.

This is one on one, no distractions. Purely a chance to get to know them and they can learn about you.

Your goal?

Learn how you can help them. This is NOT your time to pitch the latest product (there is a time and place for this). This is where you understand their current challenges they face and where you provide an option or solution.

HEADS UP: It most likely isn't your product...for now.

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THE PHONE CALL

Have you ever had a customer look forward to your call?

Have they ever told their boss, "Hold on, Bob is calling me. I WANT to take this."

All of this determines on why you are calling this person.

I like to call it the Purposely Random or Randomly Purposeful phone call. It's scheduled monthly on your end, but not on theirs.

Why do they pick up?

Because every time you call you help them. Whether personally or professionally, you have something to give them.

That's why they give you more information when you ask questions about them.

Keep it brief. Make an impact. Gather information.

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EVENTS

Do you have season tickets to the big team in town?

Have access to suite at the local music hall?

Those are fantastic! BUT only if used correctly.

Our goal is to create a memorable experience. Again, think back to your favorite memories. Most of those include experiences with family or your best friends. It probably was not with a client or employee.

Give your best clients or employees opportunities to create those memories, but don't tag along.

Nobody likes feeling obligated to talk business when they are trying to spend time with their family.

BONUS POINTS: Figure out creative ideas to enhance the experience for them.

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PERSONAL NOTES

I know this is an obvious one, but personal notes still have a huge impact on every relationship.

Shockingly, very few people still send them out. So for starters, anything is better than nothing.

BUT we are about multiplying the experience.

Here are just a few different ways you can enhance your personal notes:

- Include an uplifting statement.
- Write your notes with a slight slant.
- Have a call to action.

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HOLIDAYS

It's that time of year again. Buy something for your customer and set it next to your competition's gift in the break room.

I'm not saying don't send anything on the major holidays, but you definitely aren't going to stand out.

It's TOO NOISY during those holidays.

Your opportunity to multiply the experience is outside the major holidays and inside the unique holidays.

From all the information you have gathered you have an opportunity to WOW your customer, when nobody else is.

FOOD FOR THOUGHT: Great opportunity to double up with a gift from our previous steps.

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INTRODUCTIONS

The Holy Grail of all grails. An introduction. THE REFERRAL.

As we focus on those needs or challenges from customers, whether that is related to our product/service or not, a simple introduction can catapult your professional relationship to another level.

This is not a "you do this for me and I'll do this in return". This is purely wanting to help someone else succeed. HOWEVER, to get referrals, you need to give even more.

Here's what's cool. Not only do you get to help someone in a unique way, you end up finding a TON of joy in it as well.

Now, it's up to you to make sure you can have 2 to 3 introductions per year that will benefit that person.

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All of these steps are not rocket science. Actually, you've probably already thought about a lot of them.

The key to success with our Customer Relationship Experience is consistency.

It's important to develop systems and processes to continue to enhance the experience.

Go check out our video series on YouTube that covers these steps!

If you are ready to deep dive with each of these steps and learn how we implement them with the systems we've created, come check out our bootcamps that can fit any budget by emailing us at hello@morethanamealco.com.

Do you have an entire team that would benefit from implementing this in to their sales strategy? We can help with that too. Email us at hello@morethanamealco.com to schedule a free consult to see if it is a good fit.