



StartUp
Mendocino

BUSINESS ACCELERATOR

2025

Customers for Life: Customer Service and Client Retention



Agenda



Follow Up



What is Customer Service?



Tools for Building and Maintaining Excellent Customer Service



Let's Formalize: Client Retention Programs that Work



Next Steps



“It takes months to find a customer and seconds to lose them”
-Vince Lombardi



The support you provide your customers and clients before, during and after they purchase your products or services that provides an easy and enjoyable experience working with your company and products and services.

What word do you associate with your Customer Service?

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What is Customer Service?

What do I do, when?

Customer service isn't just about showing up nice all the time or answering the phone on the third ring. Sure, those activities may exist, however thoughtful customer service is an organized set of activities, strategically designed and delivered to meet specific stages of the customer lifecycle.

Business Relationships First



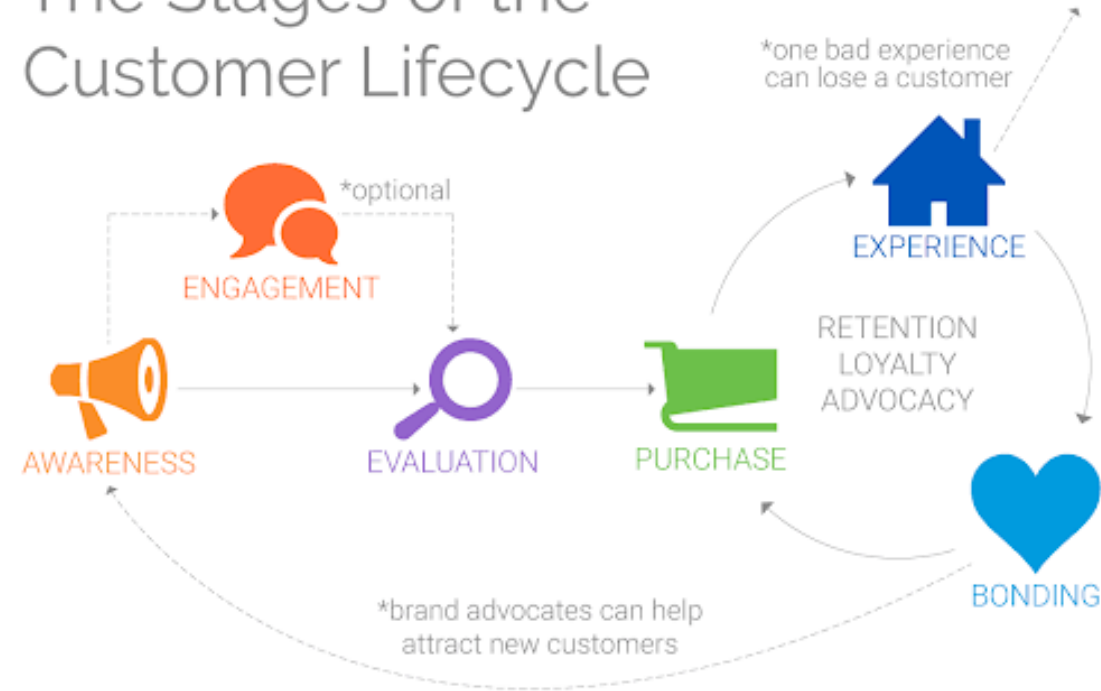
Remember that the relationship with your client is professional, not personal. This can be especially harder in a small community. Professional relationships are dominated by formality and boundaries, whereas personal relationships can be fluid, flexible and more nuanced based on emotions.

Systems and Structure Always



Systems and structure will support your relationships always being delivered in a professional manner. As you grow identifying the customer service processes and documenting them, will allow for you to teach others and eventually entrust others to deliver the same experience you do. Same time, all the time.

The Stages of the Customer Lifecycle



Documenting Workflow

1. Define the exact result you are trying to produce.
2. Document tools, people and necessities to execute.
3. Design Benchmarks.
4. Create Standards.
5. Always give tips and tricks.

A system is not complete until documented into a system action plan. When something can be done by someone else, without an owner or system creators constant interjection and interference



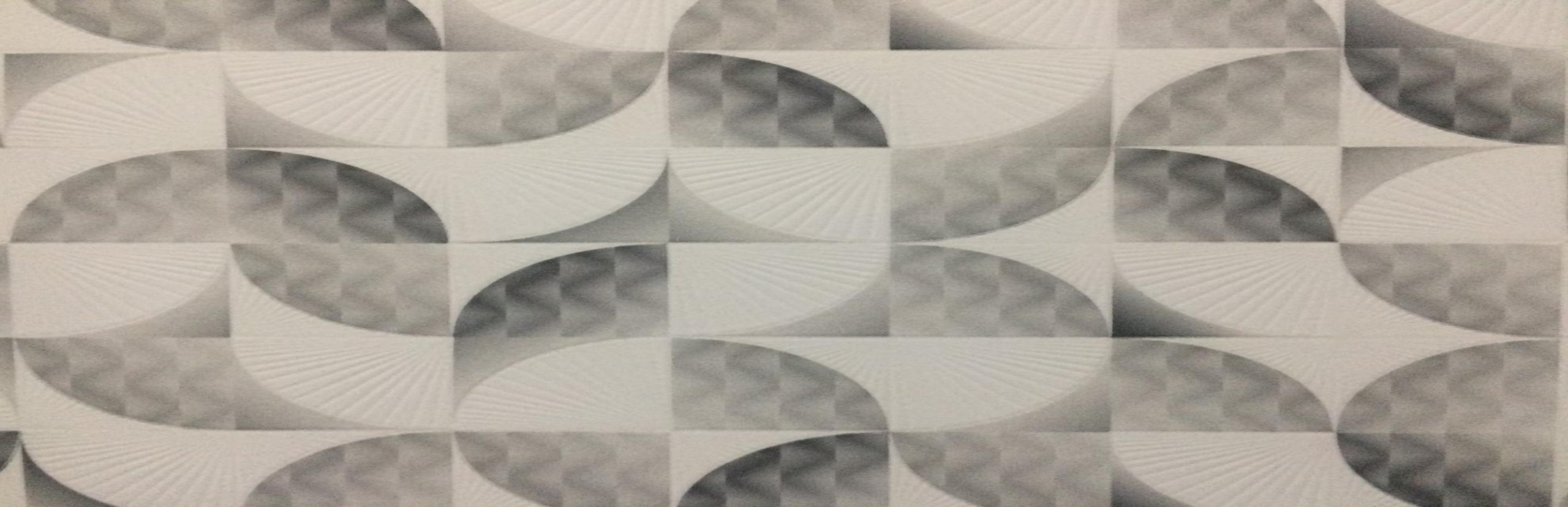
How do I Say It?

Inspire: “I am calling to give you an update on a recent change I had to make to one of our deadline dates.”

Educate: “Unfortunately, the edits took longer than I realized. While that is not going to cost you more, it will push our deadline out by 2 days. My apologies for not assessing this better before our project started.”

Implementation: “I have created space in my calendar by (Pushing another project out, working nights and weekends, not sleeping) and if I can move anything else to get this done on time, I will.”

Continuous Improvement: “I don’t want you to worry at all about this being finished by XXX. Would you like me to check in more often than I have been?”



Breakout Session

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Before.

Contract or Agreement: A document that starts and binds the business relationship through outlining expectations, standards, timing and remuneration.

Project Scopes, Mind Maps and Calendars: Defined features, functions timelines and deadlines. Most systems are online, cloud based and is accessible and updated, by multi users. Basecamp, Asana and Zoho Project are excellent project management tools.

What do you use, say and imply to start the relationship?

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During.

Information: Keeping project plans updated, you will have access to when, how and why you worked on a project or relationship. Having accurate data will allow you to understand where you stay on track or not.

Management: At the end of every week, month and quarter, audit the project and make course corrections necessary to finish on or before schedule.

Communication: If project is not on track, communicate that to whomever may be impacted.

How do you like to be treated?



After.

Check Ins and Follow Ups

Customer Surveys

Reminders and Updates

Easier Transaction Process

Would they refer you?

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Customer Retention Programs

Customer retention programs are strategies and initiatives designed by businesses to keep existing customers engaged, satisfied, and loyal to their brand over time. These programs aim to reduce customer churn (the rate at which customers stop doing business with a company) by fostering long-term relationships with customers.

Key components of customer retention programs may include:

Loyalty programs: These programs reward customers for repeat purchases or engagement with the brand. This could involve earning points for every purchase, which can then be redeemed for discounts, free products, or other rewards.

Personalized communication: Businesses use data and analytics to understand their customers better and tailor communication and offers to their preferences and behaviors. Personalized emails, offers, and recommendations can make customers feel valued and understood.

Exceptional customer service: Providing excellent customer service is crucial for retaining customers. This includes resolving issues quickly and efficiently, being responsive to customer inquiries and feedback, and making the overall experience pleasant and hassle-free.

Exclusive offers and incentives: Offering exclusive deals, discounts, or early access to new products/services can incentivize customers to stay loyal to the brand.

Regular engagement: Keeping customers engaged through various channels such as social media, email newsletters, and events helps maintain their interest in the brand and strengthens the relationship.

Feedback and improvement: Actively seeking feedback from customers and using it to improve products, services, and overall customer experience demonstrates a commitment to meeting their needs and preferences.

Next Steps:

1. System Template



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