

ServiceAutopilot™



**HOW TO CREATE (AND KEEP)
HAPPY CUSTOMERS CHECKLIST**

How to Create (and Keep) Happy Customers Checklist

Finding (and keeping) customers matters now more than ever. Check out this helpful checklist to make sure that your customers feel appreciated, understood, and have everything they need to easily do business with you.

Set expectations and overdeliver

Be clear on the services you'll provide, when you'll be showing up, and what success looks like. Communicating this with the customer and then following through is the key to growth. Then see if you can go above and beyond to overdeliver to your customers.

Make sure you have the right contact info (email, phone, and address)

Even if you don't have any marketing campaigns planned, having the right contact info can make it easier to market later on or simply get in touch with customers to say thank you or fix a problem.

Create an "Opps Kit"

Mistakes happen, and we've all been there. But if you don't have a game plan ahead of time, you'll be stuck trying to quickly react to a situation. Put together an "Opps Kit" that you can send out with a few things like gift cards, a letter, and other treats. This simple act can smooth out a minor bump in the road and keep customers committed to you.

Tell your customers you appreciate them

Showing appreciation can be a simple note, email, or even a call. The idea is to remind customers that you appreciate them and you want to continue to provide great service going forward.

Ask for (and incentivize) referrals

If you're delivering for your clients it is okay to ask if they have any friends or family that would also be interested in your services. The request for referrals can be a simple email, and providing an incentive (gift card, discount, etc.) is a great motivator.

Send a simple survey

A simple survey sent by email (or text) gives you a snapshot into customer satisfaction and provides feedback about your team too. This can be something that is automated and could be sent after every service or at random. Pro Tip: Just a few questions about the quality of service and their satisfaction are really all that is needed.

Make it easy for customers to do business with you

Remove any "friction" points in your business for your customers. Make it as easy as possible for them to pay invoices (even better if you can do it automatically), get help, or even upgrade/purchase more services.

Bottom line:

Remember it is much more cost-effective to keep your current customers than to try and find new ones.

Want to learn how you can automate many of these steps in your business? Schedule a quick demo to see how you can automatically utilize many of these steps to further grow your business.



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