Developing a Customer Contact Plan

Efficiently Driving Sales by "Touching" Customers, Prospects and Referral Sources

Summary: Regular, meaningful contact with customers and prospects should be the engine for generating new business for your company. This article provides a tool and guideline to quickly create a customer contact plan for your business.

You may, like many small businesses, reach out to important customers, prospects or contacts only when business is slow or when there is a customer problem. Customer contact may be personal, but often sporadic, reactive, and overly focused on "noisy" customers.

Or perhaps you invested significant time and money in the past on turnkey newsletters, mailers and give-aways that you "blasted" to a long, unfiltered list of clients, prospects and others. Without seeing any boost in sales, you suspect that most of your efforts were tossed in the real or virtual trash bin.

But a good customer contact approach should not be reactive or pestering. You want to build a strong, ongoing relationship with the right people, at the right time with the right approach. This article will provide you with a simple planning tool to help you create a deliberate, focused, systematic strategy for contacting customers and prospects to boost your sales. As you read through, you can quickly create a plan you can use throughout the next year by using the Customer Contact Worksheet found at the end of this article.

Who? Separate Strategies for each Contact Group

This is easily the most important decision. You want to create a separate strategy (and worksheet) for each type of contact to make sure you are effectively communicating with each group. Typically, the "who should I contact" decision falls into some combination of the following four categories:

- Current Customers and Clients: Will you be introducing a new product or service that is focused on a specific subset of clients? Do you want to specially reach out to your largest or most strategic clients? If so, you will want to divide your customers into groups by the type of product/service purchased, industry or location.
- Prior Customers: These are clients that have done business with you in the past but have not made a purchase recently. Given the decisions you made above regarding your current customer base and product launches,

you may also want to create subsets by product/service used, industry, location or size.

- New Prospects: This group consists of leads that you may have captured via a sign-up box on your website, at a trade show or through networking. Although they have not as yet purchased from you, they have expressed an interest in your company and products.
- Referral Sources: These professionals are not direct sales prospects but can often refer business or influence purchase decisions. These "centers of influence" are usually trusted advisors such as lawyers, bankers, accountants and insurance professionals who are often asked for their opinions and recommendations. Referral sources can also be well known figures within your target industry or simply well connected individuals in your business community. The key to approaching this group is to stay in close enough contact so that, if asked for a recommendation for a product or service, your company immediately comes to mind.

Remember that not all contacts are created equal. Start off by focusing on those groups that are most likely to maintain and grow your business.

When? Regular, Planned Quality Touches

It takes eight "quality touches" to build a relationship. Therefore, you want to communicate every 4-6 weeks to each of your contact groups. By creating a Contact Calendar, you can ensure your customer "touches" are timely but not pestering.

Using the calendar for each group, mark down dates that may be relevant to your contact group:

- Holidays that trigger gift or personal purchases
- Deadlines for forms, taxes, filings, etc. where you might provide tips or business advice
- New product/service launches
- Key industry events (trade shows, fairs)
- Promotions or sales events

Calendar "gaps" can then be filled in with informational newsletters or alerts. Leave a placeholder for these additional communications in your calendar.

In addition, you will likely want to touch customers and prospects at times that are tied specifically to the individual person. Decide on what events will trigger a response from you and note this on your contact worksheet. Examples of these personal contacts would be:

- Anniversary of doing business
- Birthday
- Thank you for referral
- Initial meeting follow-up

What? Quality Content that is Relevant and Useful

Quality content is critical. You have one chance (maybe two) for someone to open your newsletter, email or direct mail piece. If the reader doesn't find the material relevant or personally useful, he is unlikely to open subsequent communications.

At this point you do not want to craft the final text, but rather decide on an overall theme to your message. What information would be useful or informative to your intended audience?

- Upgrades and enhancements to current products and services
- New uses or tips that will increase the user experience
- Information or knowledge pertaining to your industry
- Recommended complimentary products and services
- Resources for additional information
- Alerts on current issues or changes to laws, your industry, etc.
- Tools, guides, diagnostics.

It is much better to have short, well-written tips and “you-should-know” notes rather than generic, shallow but lengthy communications. If you decide on a newsletter, plan out at least 8-10 topics in advance so your newsletters flow and you do not end up “dry” for new ideas in a few months.

But the best source for ideas should be your contact list. What do they want to know more about? What do they find interesting? Poll or ask for input everywhere you can (website, blog, newsletters, retail locations, employee suggestions). You will never be at a loss for fresh ideas.

How? A Mix of Formats Appeals to a Mix of Readers

Of course the ideal answer to this question would be to find out how your client, prospect or referral source likes to communicate - and then do it. If you only have a short list of strategic contacts, this is the best approach. But for those with larger and more varied lists, you can accommodate different styles with a mix of formats:

- Face-to-face appointments
- Phone calls
- Hand-written cards
- Pre-printed cards
- Targeted, personalized emails
- E-newsletters
- E-alerts

Practically the optimal format depends on the number of contacts in a group and the importance of the relationship. As you look at your contact calendar, you can decide which format is best given the audience and the message and note that decision in your worksheet.

A Few Final Suggestions

Avoid any suggestion of spamming: Regardless of the method, you want to always allow the customer or prospect the option to "opt-out" so no one can feel pressured or harassed. The opt-out process should be simple and easy to do.

Use your calendar: You are most likely to consistently execute your customer contact strategy if you log each contact "appointment" in your individual and company calendars (such as Outlook). Also, make sure you schedule the lead-time needed to prepare or execute. (For example, time to write the e-newsletter, mail time for notes, etc.)

Consider using services for creation and distribution: You can save a lot of time and learning by using services that specialize in creating and distributing online newsletters or automated cards (see Resources section for specific providers.) These services have the advantages of easy processes to create newsletters, to allow customers to opt-out and to track how many recipients in fact opened your communication. The downside to these services is that they may require tedious (and eventually inaccurate) reconciliation of contact lists. As your customer contact list and strategy grows, you should think of investing in a list management system that is tied to the sales part of your website. Since your contacts are the true gold of your company, this can be well worth the extra time and money.

Measure your results: Just the fact that you have a plan in place means that you can now track the usefulness of your customer contact strategy. Look at open and opt-out rates on electronic newsletters to measure their appeal. You can also provide incentives with promotion codes tied to each piece to directly measure its effectiveness.

Regardless of the method of your contact or length of your list, the fact that you have created a plan and set priorities means that you are much more likely to stay in touch with the people that mean the most for your business' future.