

CUSTOMER SERVICE CHECKLIST

CLIENT NAME

PROJECT

PROJECT

MEETING PREPERATION

- Check your jargon with a friend or family member. Make sure everything is clear and straightforward.
- Prepare at least 3 questions for your clients to open up a dialogue.
- Add a surprise; organizing a meeting in a new venue or bringing a new gadget to explain something.
- Think of personal anecdotes and examples to be more relatable.
- Prepare 3D-visualization or mini carbon models to make things come alive.

ENJOYABLE CLIENT MEETINGS

- Talk your clients through your recommendations.
- Offer overviews of alternatives that might save them time and/or money .
- Ask them what they think and listen to their answer. (Remember the 2/3 listening rule.)
- Explain the consequences and benefits of options.
- Be upfront about problems you can and can't solve.
- Recommend an expert for problems you can't solve.
- Have fun! Keep the mood light.

AFTER PROJECT STARTS

- Proactively reach out to clients at least 2 times a week.
- Give them a quick overview of the project progress on a regular basis.
- Inform them of any issues and how you plan to deal with them.
- Ask them if they have any topics they'd like to discuss.

AFTER PROJECT ENDS

- After the project send them a hand-written letter or thank you note to follow up
- Call your clients 1 year after project end and ask how they are doing.
- Before calling, remember the names of their partner, children, or any other small details.
- Remind them that they can call you anytime.

TURN PROBLEMS INTO OPPORTUNITY

- Always be upfront about a problem and apologise for any mistakes or issues that were your responsibility.
- Clarify what you're going to do about the situation, then act on it.
- Follow up once you've taken action even if you couldn't fully fix the problem.

EXCEPTIONAL CUSTOMER SERVICE

- Remember that everything you is marketing.
- Stay friendly after a client signs a contract. Don't lose interest and move on.
- Ask yourself: Is what I am doing exceptional customer service for my clients?
- Ask yourself: How do I ensure that everyone on my team is committed to excellent customer service?

