



Know Your Customers Better than Your Momma

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INTRODUCTION

Have you ever forgotten your mom's birthday? Shock. Horror. Gasp. Does that make you the world's worst heir or just a busy professional, overworked and overloaded with too much on your mind? Whatever your justification, momma was probably none too happy to claim you as her spawn. So how do you repent?

Have you ever introduced yourself to a new client only to find out that you've actually met before? Ouch. There are few customer interactions that make a customer feel less important than not remembering their face and/or name. It is a devastating blow to their ego and your relationship with the customer. Does this mishap make you the world's worst business owner or simply just a busy professional with too much on your mind to remember every client?

Either way, you've left your momma feeling like she raised an ingrate and your customer feeling as insignificant as the grime on the bottom of your shoe. No child or business professional wants to face this situation with their mom or their loyal customer(s) - so how can you avoid making these same mistakes twice?



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GET SCHOOLED IN THE HISTORY OF YOUR MOMMA

It is back to school with you with a history lesson in your momma and your customers. While discovering the name of your mom's first pet and her favorite high school teacher will take a time commitment, you can get better information about your customers without spending lengthy family dinners or Mother's Day with each client.

A Customer Relationship Management (CRM) system can help you better track your customer history from lead through sale and any routine customer interaction with your customer service or support staff. Track every single phone call, email, meeting, and note about each client in your CRM system to obtain a thorough history of your relationship with each client, so you are informed and engaged for every future interaction.

Your CRM system can not only save your customer relationships, it can help you build strong new customer relationships to be able to sell more products and services to your loyal client base.

TRACK WHAT YOUR MOMMA LIKES

It's important to know what momma likes, and the same goes for your customers. Your momma is elated when you buy her favorite brand of greeting card for her birthday (oh yes, she checks the back of those cards).

Your customer gets the same joy when they have a familiar, engaging interaction with your company, such as when a customer service representative asks about their recent vacation to Hawaii or comments on the performance of their regional football team. These simple interactions are what builds customer retention and loyalty.

By quickly tracking conversations, interactions, interests, and services in a Customer Relationship Management (CRM) system you can not only have those moments where you “wow” your customer by remembering their business’s anniversary or child’s name, you can also make recommendations for other products/services based on the “likes” and “dislikes” customers have shared with you.

Tracking your customer preferences can help you individually recommend complimentary products/services to those that have already been purchased by your client, but it can also help you track high level customer trends, such as customer that initial bought product A, subsequently purchased product B. Just as Netflix or Amazon automates recommendations, “Customers that watched/purchased this product also watched/purchased”, you can customize this in your CRM to empower your sales and services teams. These customer purchasing trend lines can be very powerful strategic tools that can help you bundle products or services as new offerings and/or help your sales team be more successful with cross-selling and upselling opportunities.



MAKE YOUR MOMMA FEEL THE LOVE

Now that you know your momma's and your customers' history and their likes/dislikes, it is time to make them feel the love. The more information you can track and collect about customers with your Customer Relationship Management (CRM) system, the more impactful it can become for your customers and for your business.

Your CRM is great for tracking, as well as relationship building with your prospects and current customers. No, it cannot send your mom flowers or a telegram singing drone to make up for your mishap, but perhaps if you added her to your prospect list she would receive regular email communication from you and you could even schedule your calls with your momma all in your CRM. Utilizing the history and information you have learned from your clients you can develop tailored email campaigns with exclusive offers, discounts, and bundling based on your customers' preferences.

For instance, if you ran an auto mechanic shop and you discovered that your favorite clients owned not one but two vehicles, you could send tailored emails to those customers that offered "half off their second oil change when they booked more than one car for service in the same week." Or perhaps you own a sporting goods store, where you have customers with multiple children active in sports. Before each sports season, likely quarterly, you could send a targeted email offering "15% when you outfit two or more children for their sport's season" at your store. The options and specifications are endless, not to mention once you have these campaigns created in your CRM you can run them time and time again against your segmented prospect or customer list in your CRM system. Your CRM solution automatically can add prospects or customers to a list based on a set of predefined criteria (e.g. two or more vehicles listed under one client or two or more children listed under a primary customer).

The best part of these tailored email campaigns is that they show your customers you care enough to know they own two cars you've serviced or you've paid attention when they have brought more than one of their children to purchase sports equipment at your store. You are making them feel the love and in turn you will capture more of their wallet than your competitors.



ASK YOUR MOMMA'S OPINION

As your momma always says: “Just because you are grown doesn’t mean I don’t have something left to teach you.” If you haven’t realized this already, your momma will never stop mothering you and she will never stop trying to pass on her wisdom. It is time to soak it up and find a way to make it make sense in your life.

The same could be said about your customers. Even when you’ve earned their dollars, it doesn’t mean you have learned all that you can know about your customers. Your customers that have valuable opinions that can help you gain more of their wallet and/or add more customers from your current customers sharing their insights. How can you learn more? Simply by asking your customers’ opinion. You may not have to ask your momma, as her opinion is usually volunteered, but you certainly need to ask your customers.

Leveraging your powerful CRM system, you can easily create customer surveys to get to know your customers better. You can create broad surveys that are sent to your entire customer base to get general feedback on your product or service. Or you can ask specific questions to a segment of your customers can provide you information on why they purchased your product/service to gain insight on how to gain more of this segment of customer. These types of segmented surveys can also help you identify other potential customer segments.

ALWAYS BEING THERE FOR YOUR MOMMA


Even if you may have forgotten your momma's birthday you'd always be there for your momma. The same should go for your customers. You need to be there when the chips are down and you haven't performed at your best.

The good news is even if your customer is struggling with a letdown with your product or service you can still surprise and impress them with your attention to detail. By leveraging your powerful CRM system you can quickly review the product or service they have purchased, or narrow it down if they have purchased a few, in order to resolve their issue quickly and completely.

Often, the customers that have been through a positive customer service experience with your business are more loyal from deepening their relationship with your business through this interaction. So, as your momma always says: "Treat people the way you would like to be treated."

With a versatile knowledgebase and detailed case and incident tracking it is easy to provide excellent customer service that your customers will rave about. All this information is tied into the relationship you've tracked with each customer in your CRM to provide the best customer information in order to resolve any issue quickly and completely.



A black and white photograph of two swans swimming in water. The swan in the foreground is looking down, while the one in the background is looking forward. The water shows ripples and reflections.

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because “Your Momma
didn’t raise no Fool!”]

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MAKE YOUR MOMMA PROUD

Let’s be honest, if you could do all this for your momma you would be given the MOST OUTSTANDING OFFSPRING AWARD. However, since you don’t have a Customer Relationship Management (CRM) system to track the ins and outs of your relationship with your momma, you are just going have to rely on your smartphone to remind you of her next birthday (don’t forget to mark it in your calendar - even Cortana and Siri aren’t that good).

While you are mending your relationship with your momma, improve your customer relationships with a Customer Relationship Management (CRM) system that can help you know your customers better than your momma with an absolutely FREE, no obligations consultation with a small-to-medium business CRM specialist.

We helped hundreds of businesses build stronger customer relationships and grow their business with a CRM system, all while provide helpful tips that will make you your momma’s favorite, even after the birthday fiasco.