Customer Care Follow Up System

Supplies Needed:

- 3 Ring, 2" Heavy duty binder (lime green) with Follow Up Cover Page
- Clear, top loading sheet protectors for client profiles
- 1 set of monthly dividers and 1 set of Calendar Day dividers (1 – 31)

- Fill your binder with the sheet protectors
- All new Preferred Clients should have a Client Profile Sheet as this is your record of all info on this particular client.
- For each client, have their guest profile, order forms and all other information you have on them in a sheet protector.
- File your clients according to date of presentation.
- You will now have all your clients at your fingertips.
- Each time you talk to a client, record things about your phone conversation or what you learn about their life, and file this in the sleeve with all their other information.
- All this will help you get to know them better and form relationships with them, which is very important when it comes to follow-ups!

How Do You Keep in Contact with your CLIENTS?

In 3 days ………… In 3 weeks ………… In 3 months

Example: Michelle is scheduled to get her product on October 1st. Move her Client Profile 3 days forward in the binder and call her 3 days after her product was scheduled to arrive (Oct 4th) to ask her the following:

- Do you have any questions?
- How is everything going?
- ***Important:*** Go over how to order online if they are a new Preferred Client

Once you have touched base with her in the 3 days, move her forward in the binder 3 weeks to October 25th. Touch base again to ensure that all is good.

From this point on, you can touch base with Michelle once every month, 2 months, or 3 months – depending on your preference of customer service.