



Kore Access Customer Retention Evaluation and Development



Checklist

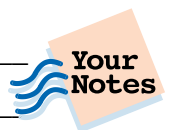
Do You Keep and Grow Your Customers?

Do you enjoy high customer retention rates? If you lose repeat business, do you know why? Are the policies and procedures you currently implement structured to encourage customers to return and grow their business with your services and products? Find out by reviewing your organization's customer retention systems and procedures with this easy-to-use checklist.

1. Basic Considerations – Assess the current state of your organizational customer retention plan and strategy.

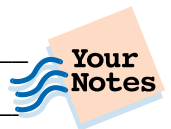
Evaluation of current systems

What current policies govern the way customers are managed? Do you have a formal program that guides the actions of staff? Are customers surveyed and feedback evaluated, distributed and acted upon? Have you identified the profile of your most profitable customer?



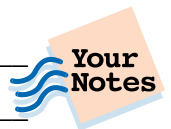
Evaluation of resources

Are staff members trained in customer service? Do you have staff members whose job descriptions specifically list retention as one of their responsibilities? Do you have the inventory of materials (appointment reminders, postcards, newsletters...) needed to keep in contact with customers?



Evaluation of motivation

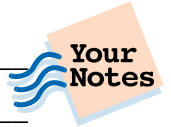
How are customers motivated to continue their relationship with you and to refer other customers to you? Education, training, discounts? What type of incentives do you offer to staff members who retain customers? Financial rewards, time off...?



2. Current Policies and Procedures – Review and evaluate the policies and procedures that your organization implements to retain customers.

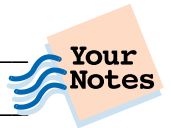
Evaluation of customer defection

Why did a customer miss an appointment? Not re-purchase a product? Why are they not returning for additional services and products? Do you have a staff member, or a third party, assigned to call and to interview such customers?



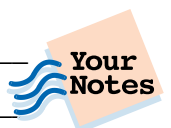
Evaluation of communication

What channels of communication do you use? Do you make reminder calls, send out appointment cards, use an in-office bulletin for announcements, publish a newsletter, send e-mail reminders and/or mail thank-you notes?



Evaluation of customer experience

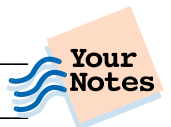
How do you teach customers about your service during an appointment? What do they take home with them? What questions do you ask to ensure they understand your policies, your products, and your services?



3. Additional Considerations – Evaluate and develop policies and programs to improve customer retention rates.

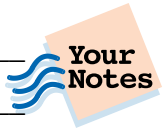
Development of training

How can you educate your customers? Do you teach while you are with customers? Write and send customers informational articles, brochures and booklets? Develop training materials and give seminars and in-office briefings?



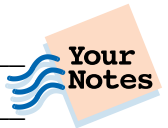
Development of loyalty program

Assess your business model and develop a loyalty program that best fits each customer. Consider appreciation gifts, special offers, discounts, birthday cards...



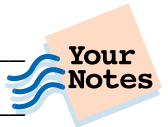
Development of customer contact

Assess your service from the customer's point of view. Use that perspective to develop services and marketing materials to promote your organization at each opportunity and at each point of contact.



Development of benchmarks

Measure your customer retention and defection rates and establish benchmarks. Be prepared to assess the growth rate of customer retention after you implement new programs. Compare those rates with your industry peers.



For additional marketing resources, please visit www.koreaccess.com.

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