



# CUSTOMER MANAGEMENT TRAINING

*Shared by L'BRI Executive Manager, Jodi Keller*

When a customer starts using L'BRI, it is important to form a relationship with them. You can do this by taking care of your customer through effective follow-up. L'BRI recommends that ideally, we would follow up with new customers within the first 7–10 days, then again in 2 weeks, and finally after they have been using the product for 1 month. Once they are an established customer, then touching base every 3–6 months is ideal.

The Customer Management tools within the Business Center will simplify customer follow-up and will help all Consultants. They will help you know which customers to contact and when to contact them, so you stay on track and provide excellent customer care. You decide when you want to contact them and how often. You are proactive and in control.

- ▶ **The Customer Management Tool is located within your Business Center, under the Business Tab, on the left labeled Customer Management.**

*Let's take a look at some of the new columns that have been added:*

- The **LAST ORDER DATE** column – You can click on the order date to find out if the customer's order was shipped or delivered. You can even track it from here.
- The **NEXT FOLLOW-UP DATE** column will help you determine when you will be making the next contact.
- The **NOTES** column is supersized to distinguish between personal notes and product notes for the customer. The word "Notes" will change color to green when a note is entered and the number of notes you have for that customer will be shown (i.e. [Notes 4](#)).
- The **BEST WAY TO REACH** column is an indication of what the client sees as the most effective way for you to contact them, however it is not always the only way.
- The **SIMPLIFIED CUSTOMER LIST** located at the top is a snapshot of your customer list that can be exported, printed or saved in a PDF!

## LAST ORDER DATE COLUMN

You can click on the order date to find out if the customer's order was shipped or delivered. You can even track it from here. This column can also be sorted from oldest order to most recent or most recent to oldest.

## NEXT FOLLOW-UP DATE BOX

*There are multiple ways you can use this tool.*

- You can type in the date that you want to follow-up, or click on the calendar and select your date.
- By using the Start and End Order Date box within the filter area, you can easily fill in the dates to follow-up based on when they ordered last.

- Sorting your list by join date or last order date to bring up most recent customers or orders.
- Or, use the follow-up start/end date within the filter to determine who to contact once you have dates established in this tool.

## PUTTING IT TO USE

### *After a Show*

Let's say you just had a Show and entered the orders in the Show tab. You would go into your Business tab and click on Customer Management. In the "Start Order Date" and "End Order Date" fields, type in today's date (which is the date of the Show), then click "Apply Filter." All the customers who ordered today will be displayed.

You will then click in the "Next Follow Up Date" box and either type in the date you are planning on contacting them or use the calendar option next to the box. Remember, you want to be sure that you are initially contacting your new customer within the first 7–10 days of her ordering the products. Once you have a date typed in, you can easily copy and paste the same date in for all of your customers. Don't forget to **SAVE** before moving on!

### *Follow-up Date*

Now that you have the follow-up date established and you have set aside time to do Customer Care, you can type a date in the **FOLLOW-UP START DATE** field. Your goal, once you have dates established for your customers, will be to filter this list and only have customers with recent follow up dates appear. Once you run the filter, you can click on the "Next Follow Up Date" column to sort it by oldest date first or last.

Another way to filter with the Future Follow Up Date tool would be to sit down at the beginning of the week and type in a specific date range. This will capture the data of all the customers that you will be contacting this week during your working time blocks.

When you reach the customer you are contacting, you would then change the follow-up date to a future date—preferably a date you and the customer agree upon. If you received her voicemail, let her know when you will be contacting her again and then put that date in the "Next Follow-up Date" field. This makes follow-up SO SIMPLE!!!!

You can do this for all new customers whether you met them at a Show, via a one-on-one, through a sample, etc. Also, if one of your existing customers places an order and you reach out to thank her for her order and answer her questions, go ahead and put in a date that is 3–6 months out to check in with her again.

Another way to use this "Next Follow-up Date" column is for all of your existing customers! You can click on a column at the top and do a sort. For example, clicking on the "Join Date" column twice will bring up your newest customers first. You'll want to be sure that you have a Next Follow-Up Date established for all of your newest customers since they are the most excited at that moment!

### **Last Order Date**

Another column to sort by is the “Last Order Date” column. Click on it once and you’ll see all the customers who haven’t ordered in several months. Click on it again and you’ll see the customers with the most recent order. Once you have your sort order, you can enter in the follow-up date. Be sure to hit **SAVE** though before you move on to page 2 or run a new filter!

### **Date Range**

Another great way to filter your customer list is selecting a date range. If you want to find a list of all the customers who ordered in May of this year so you can follow up with them between August and October, you would enter May 1 through May 31. Apply the filter and work on this snapshot of your list very easily.

## **PERSONAL and PRODUCT NOTES COLUMN**

When you meet a new customer at a Show or through a one-on-one, they typically will fill out the Client Profile. With this information, you can now enter it into the **PERSONAL NOTES** section. Maybe enter in her birthday, where she works, the best time to reach her, etc.

Then in the **PRODUCT NOTES** section, enter in any skin challenges she has, maybe what she had been currently using before L’BRI, and anything else you went over with her at the Show or appointment. Once all the information from the Client Profile is entered into notes, follow up based on her interest in hosting a Show and joining L’BRI.

Just a tip – if you type in a short message in the “subject field” you’ll be able to quickly view all your notes as a snapshot at a later date, instead of having to open up each note to read your comments. As you connect with your customer down the road, you can continue creating new notes or adding to your existing notes.

Using this tool with the Next Follow Up Date column is great! If you are talking to your customer and she shares with you that she is going on vacation next month (or maybe having surgery or having a baby), you can add this comment in the Personal Notes then select a follow-up date indicating when you want to check in to see how she is doing. She will appreciate the thoughtful gesture! Do you see how great these two tools work together?

## **BEST WAY TO REACH DROP DOWN MENU**

This column will let you select your customer’s preferred method of contact, whether it be by Text, Call, Email or Facebook. This will help you remember later how she prefers to be reached. (This doesn’t mean it’s the only way to reach her, but it may be the easiest way.) You can let her know that you prefer to connect over the phone for the first few times, but after that, ask how she’d like you to reach out. Also, be sure to remind her that L’BRI sends out monthly Product Specials emails, and if you also do this, let her know so she is aware and doesn’t feel like she is being spammed.

A great benefit to this column is if you are on your lunch hour you can quickly see who likes to be texted and reach out to them. If it’s 8:00 or 9:00 PM and you want to make a few contacts, you

could send private messages on Facebook to those customers. If someone prefers to be called, take a look at the best time to reach them and call them at that time. This is going to make it so simple and efficient and will maximize each of your working time blocks!

**Make sure you always hit SAVE at the top or the bottom of the page before you move on to page 2 or close out of the window!**

## SIMPLIFIED CUSTOMER LIST

This tool is located at the top right of the screen. Click on this link to see a snapshot of ALL your customers including when their last order was placed, their address, phone and email address. It is all of their information in one easy place that can be printed, saved as a PDF or exported to Excel. This is useful for all Consultants, but especially for those who love a paper copy of their customers and anyone who might feel a bit overwhelmed with technology.

- It is a great tool to print off and take with you if you will be away from your computer but have time to work. Print off the list and make some calls while out and about!
- It will also be useful when you are trying to clean up your customer list. You can easily find duplicate customers, those who don't have email addresses or valid phone numbers.
- You can also export it to Excel and print off mailing labels to send out invitations to an Open House or a Holiday get-together.
- You are able to click on all of the fields at the top to sort.
- You can also use the Command F button to easily find a customer, a state, order date, etc.

## ACTION STEP

If you are new to the Customer Management tool, you can begin using it with your current customers. It will give you a REASON to reach out to them right away! Let them know that you have this great tool so you are now able to select the best way to follow-up with them in the future. Ask them, "What is your preferred method of contact?" You could even ask them how often they'd like you to connect with them so you can set up their next follow-up date. Imagine calling them and saying, "I am checking in with you like I promised I would...".

So, jump in and get started! Set a goal to reach out to all of your customers within the next four to five weeks to collect their information for the **BEST WAY TO REACH** them and also have a date filled in for their **NEXT FOLLOW-UP DATE**.