

# Taking Care of Business Everyday

Clients need to trust people they do business with. Taking care of your business is taking care of your clients.

## Take Care of Your Clients

The best organizations know that client relationships are the engines that drive their growth. Knowing the difference between what your clients expect and what they value, and acting upon that difference is essential. Clients expect prompt call backs and polite staff. Every one of these items is covered in Business 101. Clients value exceptional service and top professionals make a point of providing client valued service. They target niche markets and make themselves the go-to person in that niche. There are several ways you can take care of your clients and in turn, the organization.

## Profile Your Clients

Start by profiling every single client within the top 20% of your business – your AAA and AA clients. Why the top twenty percent? To revisit the Pareto Principle, it's the top 20% of your clients who make up the 80% of your revenues. Record every single fact you learn about your clients':



**F**amily  
**O**ccupation  
**R**ecreation  
**M**oney

There are three reasons for doing this.

- First, you don't want your current business going anywhere. Knowing your clients allows you to provide personalized service and build relationships that will competitor-proof your favourite clients. Just think about why some high value clients have come to you in the past. Often it is a result of little or no contact or relationship with their previous advisor.
- Second, the reason for documenting client data is that, despite how good you might think you are at keeping this information in your head, until it's written down, it isn't equity. By recording FORM information, you and every other representative at the organization can leverage it to provide exceptional service.
- Third, profiling your clients identifies niche markets. These special groups might consist of business owners, retirees, chiropractors or dairy farmers. The discoveries made are often surprising. Such niche markets are often a great source of potential ideal clients.

The spin-offs you will enjoy from this information are exponential. FORM information also makes phone calls to your clients easier, making these interactions more meaningful. You ultimately uncover more about your clients, all of which gets fed right back into their profiles.