

RESOURCES FOR CREATING LIFETIME CLIENTS

It's important to get an overview of exactly who you are looking for as a lifetime client. Take a moment right now to make a list for each of these below.

WHO WILL BE BEST SERVED BY THE SERVICES I OFFER?

WHICH PROBLEMS DO I EXCEL IN HELPING OR SOLVING?

WHAT COMMON CHARACTERISTICS OR QUALITIES DO THE PEOPLE I ENJOY WORKING WITH POSSESS?

From here, I want you to create a clear picture of what your ideal client looks like by creating a persona. A persona is basically a short paragraph that uses a descriptive narrative to talk about your ideal client. Think of as many characteristics, adjectives, or qualities about your current or future favorite or ideal clients. Note: You may work with different groups or types of people, and that's perfectly okay. If so, you'll want to do this exercise for each different ideal lifetime client.

MY IDEAL LIFETIME CLIENT

[illegible]

MY PASSION

Bring your thoughts to something you get excited about at work. Let your mind wander and notice the first thing that comes to your mind. If you could do anything at all with your day, what would make you get excited in the morning and jump out of bed, raring to go? What would be so thrilling and engaging that you couldn't sleep or sit still just thinking about it? Picture this activity or scene in your mind and allow yourself to absorb or notice the feelings of excitement and anticipation. What outcomes or results will cause you to look back on the day and feel really good about yourself?

Pause for a moment here and simply absorb the feeling of what it's like to feel happy, satisfied, and excited by your work. Take a few minutes to write down the thoughts you had during the meditation exercise.

WHAT MAKES YOU GET EXCITED ABOUT GOING TO WORK?

WHAT MAKES YOU FEEL REALLY SATISFIED, WARM, AND FUZZY INSIDE?

WHAT DO YOU MOST ENJOY DOING IN YOUR DAY?

WHAT OUTCOMES OR RESULTS BRING YOU THE HIGHEST LEVEL OF SATISFACTION AND HAPPINESS AT WORK?

You may continue to think of ideas after this journaling exercise, so keep writing your thoughts and ideas down. A couple of prompts you might use to get started include:

- ♥ *I am most passionate about doing, having, or being* _____

- ♥ *I am the most talented at providing* _____
_____ *for my clients.*
- ♥ *I love talking with my clients/colleagues about* _____

WHERE ARE MY IDEAL CLIENTS?

Let's take time now to get clear on WHERE to find your ideal clients so you can better connect with IDEAL referral partners. As you fill in the blanks, you may want to go back to your ideal client description and add more details to it.

WHAT NEIGHBORHOOD(S) DO YOUR IDEAL CLIENTS LIVE OR WORK IN?

WHAT BUSINESSES ARE IN THAT NEIGHBORHOOD(S) THAT COULD BE A GOOD REFERRAL PARTNER?

Start with those where you already know someone or there is a connection between your services.

WHAT SCHOOLS DO THEY OR THEIR CHILDREN ATTEND?

WHAT CLUBS OR ORGANIZATION(S) DO THEY BELONG TO?

WHAT CHARITIES OR CAUSES DO THEY CONTRIBUTE TO OR SUPPORT?

WHAT OTHER STORES(S) DO YOUR IDEAL CLIENTS SHOP IN?

WHAT GYM OR SPORTING FACILITIES DO THEY USE OR BELONG TO?

WHAT SPORTS DO THEY (OR THEIR KIDS) WATCH OR PARTICIPATE IN?

WHAT OTHER PROFESSIONALS HAVE YOU HEARD THEM MENTION? (Personal trainer, chiropractor, hair stylist, tailor, counselor, etc.)

YOUR FAVORITE “LIFETIME” EXPERIENCES

I want you to think about your favorite spa, massage, or other wellness service experience ever. It could be a massage experience or your favorite facial. Take a moment to answer these three questions:

WHAT EXACTLY MADE THE EXPERIENCE SO SPECIAL?

WHAT STANDS OUT IN YOUR MIND ABOUT THE EXPERIENCE?

WHY DID YOU WANT TO GO BACK AGAIN OR REFER OTHERS?

OTHER NOTES

31+ Points of Contact in a Massage, Spa or Wellness Business

Rate your business with 1 being the lowest rating (needs much improvement) and 10 being the highest (perfect just the way it is, couldn't be better).

Circle or note the areas you might want to improve or change.

BEFORE THE APPOINTMENT

1 – Website, Menu & Business Cards	1	2	3	4	5	6	7	8	9	10
2 – PR, Marketing & Advertising	1	2	3	4	5	6	7	8	9	10
3 – Logo and Image	1	2	3	4	5	6	7	8	9	10
4 – Reputation & Buzz (including online reviews)	1	2	3	4	5	6	7	8	9	10
5 – Exterior Appearance & Signage	1	2	3	4	5	6	7	8	9	10
6 – Location/Directions, Ease of Access & Parking	1	2	3	4	5	6	7	8	9	10
7 - Phone & Scheduling	1	2	3	4	5	6	7	8	9	10
8 – Greeting & Welcome	1	2	3	4	5	6	7	8	9	10

INSIDE THE BUSINESS

9 – Waiting and Retail Areas	1	2	3	4	5	6	7	8	9	10
10 - Products sold & used	1	2	3	4	5	6	7	8	9	10
11 - Tour of Facility/Menu	1	2	3	4	5	6	7	8	9	10
12 - Explanation of Services	1	2	3	4	5	6	7	8	9	10
13 – Attitude of and Greeting by Professional/Staff	1	2	3	4	5	6	7	8	9	10
14 – Treatment Room(s)	1	2	3	4	5	6	7	8	9	10
15 –The Service Itself	1	2	3	4	5	6	7	8	9	10
16 –What Happens in the Service(s)	1	2	3	4	5	6	7	8	9	10

AFTER THE APPOINTMENT

17 – Ending the session	1	2	3	4	5	6	7	8	9	10
18 – Paying the bill	1	2	3	4	5	6	7	8	9	10
19 –Specials/rewards/programs	1	2	3	4	5	6	7	8	9	10
20 – An invitation to return/rebooking	1	2	3	4	5	6	7	8	9	10
21 – Farewell and thank you	1	2	3	4	5	6	7	8	9	10
22 – Post-Visit Marketing										
a. Birthday card	1	2	3	4	5	6	7	8	9	10
b. Thank you note	1	2	3	4	5	6	7	8	9	10
c. Referral discount/program	1	2	3	4	5	6	7	8	9	10
d. Follow up calls	1	2	3	4	5	6	7	8	9	10
e. Email updates	1	2	3	4	5	6	7	8	9	10

GENERAL OPERATIONS

23 – Facility in good repair	1	2	3	4	5	6	7	8	9	10
24 – Clean restrooms and locker rooms	1	2	3	4	5	6	7	8	9	10
25 – Amenities available										
a. Water/Tea	1	2	3	4	5	6	7	8	9	10
b. Snacks/Mints	1	2	3	4	5	6	7	8	9	10
c. Robes/slippers	1	2	3	4	5	6	7	8	9	10
d. Lockers	1	2	3	4	5	6	7	8	9	10
e. Steam/sauna/whirlpool	1	2	3	4	5	6	7	8	9	10
f. Wi-Fi	1	2	3	4	5	6	7	8	9	10

26 – Flow of visit	1	2	3	4	5	6	7	8	9	10
27 – Uniforms and appearance of staff	1	2	3	4	5	6	7	8	9	10
28 – Extra touches	1	2	3	4	5	6	7	8	9	10
a. Candles/lighting	1	2	3	4	5	6	7	8	9	10
b. Art/décor	1	2	3	4	5	6	7	8	9	10
c. Flowers/plants	1	2	3	4	5	6	7	8	9	10
d. Table treats	1	2	3	4	5	6	7	8	9	10

MEMORIES THAT LAST

29 – Music type & noise levels	1	2	3	4	5	6	7	8	9	10
30 – Scents and aromas	1	2	3	4	5	6	7	8	9	10
31 - New client gifts	1	2	3	4	5	6	7	8	9	10

OTHER AREAS/POINTS NOT LISTED

_____	1	2	3	4	5	6	7	8	9	10
_____	1	2	3	4	5	6	7	8	9	10

Client Survey #1 – Thank you in advance for answering honestly!

Clients: Please rate my business with 1 being the lowest rating (needs much improvement) and 10 being the highest (perfect just the way it is, couldn't be better).

Circle or note the areas you most want us to improve or change.

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Client Survey #2

Thank you for taking this short survey. Please circle as many choices as apply for each question.

WHAT DO YOU LIKE MOST ABOUT MY BUSINESS?

- | | |
|----------------------------|-----------------------------------|
| ♥ Appointment availability | ♥ Prompt service |
| ♥ Hours/schedule | ♥ Online gift certificates |
| ♥ Prices | ♥ Online scheduling |
| ♥ Services available | ♥ Payment options available |
| ♥ Location/area | ♥ Communication methods available |
| ♥ Décor /setting | ♥ Therapist Experience |
| ♥ Products used | ♥ Other |
| ♥ Products sold | _____ |
| ♥ Quality/value | _____ |

COMMENTS:

WHAT DO YOU LIKE LEAST (OR FEEL NEEDS IMPROVEMENT) ABOUT MY BUSINESS?

- | | |
|----------------------------|-----------------------------------|
| ♥ Appointment availability | ♥ Prompt service |
| ♥ Hours/schedule | ♥ Online gift certificates |
| ♥ Prices | ♥ Online scheduling |
| ♥ Services available | ♥ Payment options available |
| ♥ Location/area | ♥ Communication methods available |
| ♥ Décor /setting | ♥ Therapist Experience |
| ♥ Products used | ♥ Other |
| ♥ Products sold | _____ |
| ♥ Quality/value | _____ |

COMMENTS:

WHAT ARE YOUR PREFERRED COMMUNICATION METHODS FROM ME/ABC SPA?

♥ Email

♥ Direct mail

♥ Phone Call

♥ Other

♥ Text message

♥ Social Media postings

WHICH – IF ANY – OF THE FOLLOWING DO YOU USE ON A REGULAR BASIS?

♥ Facebook

♥ Read blogs

♥ Twitter

♥ Check email

♥ Linked In

♥ Other

♥ Pinterest

♥ Yelp

♥ Instagram

WHAT WOULD YOU BE MOST INTERESTED IN LEARNING ABOUT VIA EVENTS, NEWSLETTERS, AND SOCIAL MEDIA CHANNELS/PAGES? CIRCLE ALL THAT APPLY.

♥ Self Care To Do At Home

♥ Information About Other Services, Products

♥ Health And Wellness Tips

♥ Organic/Green Issues, Causes and Products

♥ Weight Loss/Diet Tips

♥ Other:

♥ Beauty/Skin Care Tips

♥ Anti-Aging

ARE YOU COMFORTABLE REFERRING OTHERS TO ME/ABC SPA? WHY OR WHY NOT?

IF YOU ARE GENERALLY HAPPY WITH MY SERVICES, PRODUCTS, AND BUSINESS, CAN YOU SHARE A SHORT COMMENT OR TESTIMONIAL ABOUT YOUR EXPERIENCE HERE AND WHAT YOU ENJOY MOST ABOUT MY BUSINESS/SERVICES?

MAY WE USE YOUR COMMENTS AS A PART OF OUR MARKETING? YES NO

MAY WE INCLUDE YOUR NAME WITH YOUR COMMENTS? YES NO

Name (Optional):

Preferred email address (Optional):

Preferred phone contact (Optional):

Thank you for your time and comments as well as your business.
Your feedback is invaluable to us!

Ways to Connect with My Lifetime Clients

After you've rated yourself on the points of contact, and perhaps surveyed your clients about what they like and don't like about your business, write down at least three things you can do to connect with your clients on a deeper level and three ways you can maintain that connection through follow-ups. I've given you plenty of ideas in the book and am sure you have others of your own.

THREE WAYS I PLAN TO CONNECT WITH CLIENTS ON A DEEPER LEVEL

THREE WAYS I PLAN TO FOLLOW UP CONSISTENTLY

Bonus Exercise! Getting Lifetime Clients to Return

If you could get one new client to return 12 times a year at your regular rate, pay or commission, how much money would that generate each year?

Your rate _____ *x 12 visits* = _____

Your average tip _____ *x 12 visits* = _____

Write down three ideas for getting a potential lifetime clients to come back to you at least once a month.

Qualities and Habits of a Forever Professional

How many of the qualities or habits listed below do you currently have?

Put a ✓ check mark by each quality or habit that you are highly adept at now.

Then rate yourself on the qualities and habits listed below with 1 being the lowest rating (needs much improvement) and 5 being the highest (perfect just the way you are, couldn't be better).

Circle or note the areas you most want to improve or change) and put an X by or cross through those you feel are unimportant or irrelevant for you at this time.

Feel free to also re-word any qualities that are not quite right for your profession. For example, if you are a personal trainer, "Checked in about pressure/pace" might change to "Checked in about intensity of workout."

If you have others working for you, copy this evaluation and give them a chance to rate themselves and/or use as part of a regular review. If you work with someone else, you may also share it with your boss 😊

☐ Thoughtful	1	2	3	4	5
☐ Intuitive	1	2	3	4	5
☐ Professional	1	2	3	4	5
☐ Warm	1	2	3	4	5
☐ Friendly and personable	1	2	3	4	5
☐ Gentle	1	2	3	4	5
☐ Intentional	1	2	3	4	5
☐ Ability to tune in	1	2	3	4	5
☐ Aware	1	2	3	4	5
☐ Welcoming	1	2	3	4	5
☐ Open	1	2	3	4	5
☐ Does a thorough assessment	1	2	3	4	5
☐ Explains the process/steps of service	1	2	3	4	5
☐ Takes time to get to know clients	1	2	3	4	5
☐ Provides value-added experience	1	2	3	4	5
☐ Knowledgeable	1	2	3	4	5
☐ Attention to detail	1	2	3	4	5

☐ Customizes products for clients	1	2	3	4	5
☐ Asks what areas to skip	1	2	3	4	5
☐ Checks in about pressure/pace	1	2	3	4	5
☐ Asks questions	1	2	3	4	5
☐ Offers solutions and advice	1	2	3	4	5
☐ Makes clients feel comfortable	1	2	3	4	5
☐ Remembers personal details	1	2	3	4	5
☐ Gives a warm greeting	1	2	3	4	5
☐ Attentive	1	2	3	4	5
☐ Respectful	1	2	3	4	5
☐ Good communication	1	2	3	4	5
☐ Puts clients at ease	1	2	3	4	5
☐ Pleasant	1	2	3	4	5
☐ Seamless Flow	1	2	3	4	5
☐ Nurturing	1	2	3	4	5
☐ Pays attention to client needs	1	2	3	4	5
☐ Uses visual aids/pictures	1	2	3	4	5
☐ Provides self-care or stretching exercises	1	2	3	4	5
☐ Offers a tour	1	2	3	4	5
☐ Explains the services/procedures	1	2	3	4	5
☐ Informative	1	2	3	4	5
☐ Prepared to handle unexpected problems	1	2	3	4	5
☐ Prompt/respectful of clients' time	1	2	3	4	5
☐ Focuses on client's goals	1	2	3	4	5
☐ Stays in touch/checks in between appointments	1	2	3	4	5

WHAT OTHER QUALITIES OR HABITS WOULD YOU ADD TO THIS LIST?

DID YOU SEE A FEW THAT YOU'D LIKE TO ADD OR IMPROVE UPON? THE TOP 3 YOU WANT TO FOCUS ON BELOW.

BONUS QUESTION! WHAT STEPS CAN YOU TAKE TODAY TO IMPROVE THE THREE AREAS YOU MENTIONED ABOVE?

WHAT OTHER SPECIAL TOUCHES HAVE YOU BEEN WOWED BY?

WHAT ARE SOME SPECIAL TOUCHES YOU CAN ADD TO WIN YOUR CLIENTS OVER FOR A LIFETIME?

Deal Breaker Exercise

CIRCLE EACH CLIENT ISSUE YOU FIND DIFFICULT TO DEAL WITH.

Habitually show up late,
unhelpfully early, stay too long,
or a combination of the three.

Often come in rushed, stressed,
or in a bad mood, putting you
into a negative state of mind.

Be overly demanding, needy,
hard to please, and/or an
incessant complainer.

Expect ongoing discounts or
deals because they are such
loyal customers, yet brag about
how much money they make,
have, or spend somewhere else.

Have personal hygiene issues.

Fail to pay promptly.

Give unsolicited advice because
they know more than you do –
about everything.

Expect more energy and time
from you than the service
allows - or than they are willing
to pay for.

Cancel or change their
appointments at the last minute
or “no-show” without calling.

Be loud, nosy, negative, rude,
arrogant, disrespectful or
snobby.

Have no regard for the personal
space or boundaries of others.

Act inappropriately or be
socially inept.

Want you to do things out of
your area of expertise or scope
of practice.

Wear you out, bring you down,
or get on your last nerve.

WHAT OTHER QUALITIES, ACTIONS, OR BEHAVIORS DO YOU CONSIDER TO BE LESS THAN IDEAL?

FROM THE LISTS ABOVE OF QUALITIES, HABITS, OR ACTIVITIES – OR THE ONES YOU’VE LISTED, WHICH ISSUES ARE ABSOLUTE DEAL BREAKERS WITH YOUR CLIENTS?

Bad Clients/Non-Ideal Clients

Jot down the names of a few non-ideal clients you need to let go of, or who may need to be rehabilitated from their bad behavior.

Next write down the reason why they need to go. If you think they can be rehabilitated, put a check by their name.

If not, write down a possible break-up idea/strategy in the notes

Client #1 Name: _____

Reason(s): _____

Notes: _____

Client #2 Name: _____

Reason(s): _____

Notes: _____

Client #3 Name: _____

Reason(s): _____

Notes: _____

BONUS EXERCISE

Using the following script as a guide, write a sample conversation to use with your non-ideal client break-up(s). This can also be the place where you vent and say all the things you can't or shouldn't in person before you have the professional conversation in person 😊

VENTING EXAMPLE (for FUN ONLY! Do not use this with an actual client!)

“Jack, I am sick and tired of your last-minute cancellations and lame excuses. You’re difficult to work with as it is, and I’ve made many changes in my plans to accommodate your ongoing neediness. Despite my heroic efforts, you act like you think you are my only client and that I should bow down every time you walk through the door. I’ve had enough of your whining and manipulation. I deserve better clients who will treat me with respect AND be willing to pay my full price without complaining every time. So hit the road Jack, and don’tcha come back, no more, no more, no more, no more.”

PROFESSIONAL EXAMPLE

“Bob, I want to thank you for your past business and support of me as a personal trainer. I greatly appreciate it. Unfortunately, due to our ongoing scheduling difficulties, I think it would be best for us to end our professional relationship for the time being. I don’t think I can meet your scheduling needs and hope you understand.”

YOUR TURN – VENTING VERSION

YOUR TURN – PROFESSIONAL VERSION
