

Delivering Excellence



**How to Consistently Provide
Five Star Customer Care that
People Will Rave About...**

...no matter what business you're in!

Tim Dodd

Disclaimer

This book has been written for information purposes only. Every effort has been made to ensure this book is as complete and accurate as possible. However, there may be mistakes in typography or content. Also, this book provides information only up to the publishing date. Therefore, this book should be used as a guide - not as the ultimate source.

The purpose of this book is to educate. The author and the publisher do not warrant that the information contained in this book is fully complete and shall not be responsible for any errors or omissions. The author and publisher shall have neither liability nor responsibility to any person or entity with respect to any loss or damage caused or alleged to be caused directly or indirectly by this book.

Copyright ©2018 Tim Dodd Consulting Services Ltd
All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior permission of the author.

First published in Great Britain in 2018
Tim Dodd - 3d Consulting Services
9, The Willows
Station Road
Pulborough
West Sussex
RH20 1RH
www.3dconsultingservices.com
support@3dconsultingservices.com

Created by 3d Consulting Services

Delivering Excellence

How to Consistently Provide
Five Star Customer Care that
People Will Rave About...

...no matter what business you're in!

Tim Dodd



3d Consulting Services
Magnifying Your Mission : Multiplying Your Reach

Contents

Introduction.....	1
Mind Your FAQs.....	5
Conquer Confusion with Tutorials.....	10
Crowdsource with Your Community	14
Go High-Tech with Chat Bots	17
Tap into the Power of Email Automation.....	22
Conclusion and Next Steps	29

Introduction

It is essential for any business, no matter what their size, to offer the best customer service possible at all times.

Each time you have direct contact with your customer, it's a chance to brand your business in their mind as one that truly cares about their well-being.

This is how you build a strong relationship and it leads to further sales and referrals.

Stellar customer service also mitigates and minimises other problems your customers might have with your service. If they have a great experience with your company, things like a defective product or a late shipment will not stop them from singing your praises and loving you nonetheless.

But the challenge for a small business or solo entrepreneur is that you don't have the staff or resources to provide time-intensive customer service. This is where automation can be a huge help. It allows you to automate certain aspects of your customer service so that you can scale up and provide the best service possible using tools that are free or low-cost.

Why Automate Your Customer Service?

It Saves Time. If every query from a customer comes directly to you and you need to answer each manually, it will drain the time you need to get other things done. You could end up spending hours each day explaining basic policies that could be easily stated on your website for customers to see.

It Saves Money. Hiring an assistant or other staff to handle your customer service issues means more expenditure for your company, which may already be operating on a shoestring. While it may be inevitable that you need to spend funds on customer service and it's a worthwhile investment, automation can cut at least some of the costs for you.

[Delivering Excellence](#)

More Efficient 24/7 Customer Service. One of the benefits of automation is that it removes human error. It cuts down on mistakes you could easily make and provides a consistent level of quality for your customers. Automated customer service is also available 24 hours a day. Even when you're sleeping or enjoying the weekend, your customers can be getting their needs met.

Focus on Other Priorities. If customer service automation saves you an hour each day that you use to respond to customers, this is an hour you can use for something else. Automating what CAN be automated for customer service allows you to focus on what you CAN'T automate.

Quicker Response Times for Your Customers. The purpose of customer service is to meet the needs of customers, whether they are questions, comments, or problems. When successfully automated, your customer service can meet the needs of your customers much more rapidly. If they know where to find answers to their questions on your website, this saves them time emailing you and having to wait for an answer.

Easy to Scale. Any kind of automation, including customer service, allows you to more easily scale up your business operations. As your company grows, these systems that you have in place can handle the growth, and it's easier for new members of your organization to learn its operations.

Instant Feedback. Automation can give you instant feedback on your customers' main questions and concerns. You could manually record each question a customer asks you, but automation allows you to get instant data on what information customers are accessing or any problems they report.

Greater Customer Retention and Increased Revenues. With the importance of customer service and its direct effect on revenue, the appropriate type of automation can lead to additional sales in the future from repeat customers and referrals. People love good service and often tell their friends about it.

Customer Service automation saves time	• If every query comes directly to you it drains your time.
Customer Service automation saves money	• Hiring someone to focus on customer service means having to pay them.
Efficient 24/7 Customer Service	• Automation removes human error and cuts down mistakes.
Focus on other priorities	• Automation allows you to focus on other activities.
More rapid response for your customers	• Automated customer service enables your customers' needs to be met faster.
Easier to scale	• Automated systems enable you to expand your business more easily.
Instant feedback	• Receive immediate feedback regarding customers' issues and concerns.
Better Customer Retention and increased revenues	• Effective automation lead to additional product sales with repeat customers.

What You Will Learn From This Short Book

Once you've finished this short book, you'll be able to:

- Recognise the benefits of automating certain elements of your customer service with the aim of improving your overall level of service, making better use of both your time and resources, and establishing your business as a customer service leader in your market.
- Identify common questions that your customers have regarding your business, and compose satisfactory answers for them.
- Accurately anticipate questions that might arise and offer a solution before they do.
- Identify processes within your business model that might require in-depth tutorials, and create materials to explain them.
- Develop and nurture a forum or group to encourage customers to assist one another with queries.
- Explore the opportunity for using chat bots, and how they can be implemented into your customer service strategy.

Delivering Excellence

- Put together an email schedule that focuses on developing customer relationships, as well as answering questions and anticipating needs.
- Explain the importance of progression in customer service, and how to provide customers with the option to work toward the right solution.

Brainstorm Time:

1. Write down all the ways that customers are currently able to contact you or find more information; for example, through email or social media.
2. Identify the key areas in your customer service strategy that you think could run more efficiently.

Mind Your FAQs

Customers contact businesses in order to ask questions. It's quite likely that this is the majority of the customer service issues you handle on a regular basis. If you look over the questions people have asked in the past weeks, you may see some patterns arise. You might notice that many customers ask the same questions.

Being readily available and providing prompt answers to these questions is a great way to provide excellent customer service. But anticipating these questions and providing answers before they're even asked saves both you and your customers even more time.

This is why companies create FAQs. An FAQ, or "frequently asked questions," is a page or part of a page that lists common questions and their answers. With an FAQ, your customer can search first to see if their question is on the site. If so, they can get their answer without having to contact you at all.

Choosing Questions for Your FAQs

Building a good FAQ list starts with brainstorming every conceivable question your customers might have. In terms of length, it's nice to create an exhaustive list of questions, but you also don't want it to be too unwieldy. After you've assembled questions and written answers, you'll need to make your FAQs easy to navigate and use, so keep this in mind.

Start by considering common questions you've received in the past. Go over your emails or social media messages and try to find customer questions. If there are ones that are commonly asked, these need to definitely be on your FAQ list, preferably at the top.

Another way to gather questions is to ask current customers for feedback. You can ask them if they have any questions, or ask them if there is anything

[Delivering Excellence](#)

that was confusing in dealing with your company. Contact them through whatever channels are available. If you have an email list, you can put a call out through email. If you have an offline store, you can include a feedback card or come right out and ask them.

You can also anticipate possible questions to round out your list. Think about your existing products and services, new products and services, sales procedures, and policies. Try to imagine what questions might arise.

Managing Your FAQs

No matter how many questions your list contains, there is always a chance that your customer won't find the information they want to know. You should include a link where people can contact you from the FAQ page and create a system for the query to progress if the customer can't find the answer.

Once your FAQ database is written, you should always refine and update it. If you start hearing new questions from your customers or you discover new issues that they're facing, add them to your list.

FAQ Tips

As mentioned before, you might want to consider the length of your FAQ list. If customers can take it all in at one glance and you can tackle most of the major questions, this might be a good way to go. You may want to remove any questions that aren't actually "frequently asked" as they might clutter up the list or get in the way of the most important ones. Remember that the effectiveness of your FAQ list is in how quickly, efficiently, and fully it responds to your customers' needs.

If, on the other hand, you want to include a large and unwieldy number of questions, you have a few options. You can create categories for questions, such as Products, Policies, Quality Issues, etc. Make this as easy to see and

understand as possible or else it will frustrate visitors rather than help them. You can also add a search feature allowing customers to search using keywords or phrases.

Write your questions and answers in the tone of your customers. Don't write in overly formal language or use jargon they may not understand. Try to create questions that are phrased in exactly the way customers will ask them.

Your FAQs can be more than just text. It might be useful for your customers to include images, screenshots, or diagrams. Try to think of the best way to answer each question that's easiest to understand.

Since you're adding an FAQ resource to your website, you might want to think about keywords and SEO since it will be searchable by Google. However, write and design for maximum ease-of-use and efficiency for your customers, not just for search engines.

Make sure that your FAQ page or link is easy to find in your site navigation. Your customers may not know that it exists, so prominently display a link on your main page and all other relevant pages. Also, announce to your social media followers, email list subscribers, and offline customers that you now have an FAQ list once it's completed.

Follow up whenever possible with customers for feedback on how helpful your FAQ list was. Ask if they had any problems or if there is anything they could change.

Leverage Help Desk Automation

Help desk software, although manned by Customer Support staff, is an automated platform you can use to receive and respond to escalated queries and support requests. The help desk can be used to troubleshoot product issues, or manage sales queries that could not be resolved through

[Delivering Excellence](#)

other avenues, such as your database of FAQs.

Help desks can be automated to perform a number of tasks, making staff input unnecessary and self-service a quicker solution for customers. Quite often customers will reach out to your help desk without having first taken the time to check FAQs for a resolution to their problem. For the more common queries, standard answers can be pre-written and programmed into the help desk to quickly satisfy the request at a click of a button.

Some help desk programs offer an option to create a knowledgebase of information, which can then be integrated with a chat bot – an artificial intelligence or ‘virtual agent’ that interacts with customers to deliver the answers they’re seeking. We’ll look at chat bots and how they work later on.

The key to leveraging help desk software is to make sure all customer service agents know how it works, the extent of its capabilities, and the service guidelines you want them to follow. Make sure your support staff are given in-depth training on the help desk package you decide to use, in order to get the most from it. You’ll find that other features of most packages will prove themselves essential to your customer support system, such as analytics and chat facilities.

Popular help desk software programs include:

- [FreshDesk](#)
- [ZenDesk](#)
- [Samanage](#)
- [SysAid](#)
- [ConnectWise](#)

You can start out with a basic package for most help desk platforms and then add on other features and automation as you grow. Just be sure to explore each one and the options they provide before signing up to one.

Brainstorm Time:

1. Write down 5-10 of the most common questions you receive from customers.
2. Draft a response to each question.
3. Write down 5 questions you think you might receive from customers about your products or services today or in the near future.
4. Draft a response to each question.
5. Note the steps customers would take to progress their query to the next level in your customer service process. What would make it easiest for them to get their question answered?
6. Add your FAQ to your website on a dedicated page or to your customer support desk online in the relevant section.

Conquer Confusion with Tutorials

A list of FAQs can answer basic questions about your products or policies. But if you have to explain to a customer how to do something more complex, such as installing or using a software program, you might need a tutorial.

Producing Tutorials

An easy way to offer tutorials is to create how-to reports using screenshot software. This is the ideal way to make tutorials that involve tech or computer operations. For example, if you're teaching someone how to install and run a software program, you could run through the steps yourself, taking screenshots of each step, and adding text and notes. Screenshot software allows you to write and add highlights and other features to your screenshots.

Good screenshot software programs include:

- [Snagit](#)
- [GreenShot](#)
- [Lightshot](#)
- [PicPick](#)

It's very easy to produce video tutorials where you show your customers step-by-step how to do things. They can access the video and actually watch you as you perform the procedure.

The key to making a good video tutorial is to know the process you're teaching inside and out. You might want to do a practice run before you record the tutorial and work out the kinks. This can cut down on editing time later.

If you need an outline, it's better to create a bullet point outline than a

script to read. If it sounds like you're reading off a script, this can lead to a dull video. Using an outline, you can make sure you cover all of the main points and the tutorial is focused, but your speech will also sound natural and conversational.

You may want to record video and audio separately. It's sometimes tough to do the two things at once and it's easy to make mistakes. You can record the video first, and then go back and narrate the audio.

Here are some tools for making video tutorials:

- [Camtasia](#)
- [CamStudio](#)
- [Screencast-O-Matic](#)
- [Copernicus](#)
- [ScreenRecord](#)
- [Jing](#)

Of course, you can also create live-action video tutorials. Depending on what you're selling, this may be appropriate. For example, if you sell cosmetic products, products related to music, sports-related products or services, or a physical product you may want to demonstrate with a live action video.

Naturally, a live action video requires more in terms of production, but you can still create short and simple yet effective videos on a shoestring budget and without much effort.

Publishing Your Tutorials

Provide clear access to tutorials for all new customers. Make sure they know you're offering them and where they can find them. If you can, publish them directly on your website. You can also include links to your tutorials on your FAQ where appropriate.

[Delivering Excellence](#)

You can publish your video tutorials on YouTube and other video sharing sites. This has the added benefit of attracting new people to your products and services. People will see your videos and then check out your website for more information.

Tips on Tutorials

Once you produce your first tutorials, you'll see how easy it is and you'll have a system down for tutorial creation. Keep creating new tutorials as needs arise. Seek feedback from your customers on what else they'd like help on, and create teaching materials for them based on this feedback.

Somewhere in your tutorials, give your customers a way to reach you and ask further questions if it didn't fully satisfy them. For example, at the end of your short video, you might have a call to action urging the customer to contact you if they need further information.

Video tutorials should be just as long as they need to be, but there are several advantages to creating short videos. First, short videos are popular and get more views. They're easier to digest. If you're distributing your videos on YouTube or another marketing channel, you'll get more exposure if you have more videos. In addition, each video should be focused on a single operation. If you have long or complex processes you want to teach, consider breaking them up into shorter videos.

Remember that tutorials don't have to be slick, complex, perfect, or professional-looking. They can be very simple yet effective. The important thing is that you provide clear explanation and instruction for your customers.

Examples of Tutorials

If you've never created or used a tutorial before, here are some examples of tutorials to give you a few ideas.

- [How to Use the Internet](#)
- [Hootsuite Beginner Tutorial](#)
- [Twitter Basics](#)

Walkthrough / Guided Tour Programs

Walkthroughs or guided tour programs are software programs that help to guide visitors through your website. Like a guided tour of a store or facility, they show them how to use it, and also provide information when the visitor needs it. They do this through help balloons, FAQs, tutorials, and other options for help in real time. Customers can access this content without leaving the site.

There are both premium and open source options. The most popular at the time of writing are:

- [Walkme](#)
- [Whatfix](#)
- [Inline Manual](#)
- [Helppier](#)
- [Walkhub](#)
- [Tutorialize](#)

Brainstorm Time:

1. Think of 3 processes related to your most profitable products or services that could benefit from a tutorial. Use the examples included in the module for ideas.
2. Using the worksheet, create a bullet-point breakdown of what to include in each of these tutorials.
3. Note the steps customers would take to progress their query to the next level in your customer service process.
4. Plan which technology you will use to create your tutorial.

Crowdsource with Your Community

If you have a customer base of active and interactive users, you can create an online community where customers who are already using your product or service can answer questions.

In addition to saving you time and resources asking customer questions directly, an online forum such as this offers a few key benefits:



- **Information about your product or service is user-generated.** It grows organically in direct response to real customer needs.
- **People who have used your product or service as customers may have insights into it that you, the creator, don't.** They understand your products from the point of view of a customer.
- **It's great for getting feedback on your product or service.** You can monitor the discussions between members of the community and easily identify strengths and areas for improvement.

Your crowdsourced community could be created using a forum platform or a social media group such as Facebook Groups (Facebook is ideal since most people are likely to be using it already).

You could use the following software to add a forum to your website:

- [vBulletin](#)
- [IP.Board](#)
- [Discourse](#)
- [Vanilla Forums](#)
- [phpBB](#)

If you have a WordPress site, you can use the following plugins:

- [bbpress](#)
- [BuddyPress](#)
- [DW Question and Answer](#)
- [Simple:Press](#)

One of the main advantages of Facebook Groups is that they're extremely easy to set up and manage. If you're already using Facebook for your business, it's a natural extension to add a customer Q&A portion. Facebook offers much in the way of features but there are a few downsides. First, not all your customers may use social media, and those who do may not check often. Also, content eventually disappears down the feed as new content is added. If archiving accumulated knowledge is important to you, you may want to choose the forum option.

Encouraging Customer Engagement

Encourage a culture of helping among your customer base. As with any online forum, you'll need to be there at first to answer questions and encourage participation. There will likely come a time when you won't need to participate so much (although it will always require some moderation).

One way to encourage engagement is to offer rewards to customers who help the most people. Just as on a regular online forum, you can make people "Gold Members" or offer special badges for X number of replies.

Delivering Excellence

Since you're a business, you could offer discounts or coupons for people who are highly active. You can also help it along by including a list of examples for encouraging.

You'll find more engagement in your forum if you're personally involved. Welcome each new member and try to get to know everyone, especially the heavy users, on a personal level. Use the forum also to seek feedback. If members feel a personal connection to you, they'll find it easier to leave comments and ask questions. Again, your direct involvement in the forum will mostly be important at the beginning.

You can use your online community to create an archive of queries with the answers to add to FAQs and reference material, or help generate tutorials.

Make sure that all your customers know about your forum and you give them easy access to it. Let them know that they can get their questions answered there, but also always give them the option of contacting you as well. Some companies have earned a negative reputation for only offering a community and no help from the company itself, which makes the company seem inaccessible and faceless.

Brainstorm Time:

1. Brainstorm ideas to encourage activity within your community.
2. Note the steps customers would take to progress their query to the next level in your customer service process.
3. Identify a platform that you could use to create an assistance community for your customers, listing the pros and cons for your business. Pick one to try.

Go High-Tech with Chat Bots

You've probably encountered a chat bot somewhere before. You arrive at a website and within a few seconds, a voice or picture of a person is asking you if you need help. You might see a video of a person talking to you in front of the website. A chat bot is a website feature that is used to give the customer the virtual experience of being greeted by a customer service representative. They are also known as virtual agents.

Many chat bots are designed to look like live chat to your customer. A chat box appears and the customer is invited to ask a question. The responses, which are programmed by you, are natural and conversational in tone. It imitates the experience of someone talking to a real representative of your organization. Of course, the customer is aware they're talking to a robot.

There are many key advantages to using a chat bot:

- 
- Chat bots can handle simple inquiries very easily
 - Chat bots are the next best thing to talking to a real person
 - Chat bots don't make mistakes
 - Chat bots can do things humans can't
 - Chat bots are fast and respond consistently
 - Chat bots are available 24/7

[Delivering Excellence](#)

- **Chat bots can handle simple inquiries very easily.** It's likely that a great number of your customers' most common questions are the same. A chat bot can be easily programmed to answer questions about your policies, hours of operation, shipping times, product lines, and so on.
- **Although this is a form of automation, it provides the next best thing to talking to an actual customer.** In fact, chat bots get more lifelike every day and are increasingly using the latest artificial intelligence technology. It has also been pointed out that a virtual rep can be more pleasant to deal with than a customer service rep who is tired, unengaged, uninformed, or rude.
- **Chat bots don't make mistakes.** They will say and do exactly what you program them to. The bot will know everything about your company and its products that it needs to know. Like many other forms of automation, using a virtual agent removes human error.
- **Chat bots can do things humans can't.** You can program your bot to instantly know everything about a customer's history with your company so that they can respond uniquely to their needs and make other product recommendations based on this information. Some virtual agents can anticipate customer needs and offer them what they need before they ask for it.
- **Chat bots are fast.** A virtual agent allows your customer to get their question answered quickly and satisfactorily without the customer having to navigate an FAQ or search for answers to their questions.
- **Your virtual agent is standing by 24 hours a day and seven days a week.** It can interact with customers and answer their questions while you're sleeping or taking care of other work.

At the time of writing, there are still some things chat bots can't do that

humans can. Today's virtual agents can't handle complex queries, such as questions about product specs, although it is likely that improvements will be made in the near future.

One other downside is that even the simplest virtual agent requires some programming and set-up on your part. There are open source and premium programs, but most will cost some money and take some preparation.

Where to Use a Chat Bot

So far, we've discussed using a chat bot to answer customer queries. This is the simplest and most common use, and it requires the least amount of programming or set-up on your part. But there are other ways you can use virtual agents to improve your customer service as well.

A virtual agent (V.A.) can be used to lead the customer through the ordering process. Just as a bot can help people find the information they're looking for, it can also instruct them at each step along the way on what they need to do. For example, it might say, "If you're ready to make your order, start by clicking here..." It can do things like remind the customer to choose their shipping method, and so on.

Your bot can be used to get feedback from the customer. You can use it in lieu of a survey. It can ask customers for feedback during various steps of the purchase process. For example, a chat bot could appear right after the purchase was made, asking them to rate the transaction and leave comments if they'd like.

Chat bots can also share information about new products or services with your customer. A virtual agent could be like a piece of interactive video content that tells a website visitor about your new offer and fields any questions they may have.

There are several ways chat bots can be used to sell directly. Your virtual

[Delivering Excellence](#)

agent can be used to up-sell or cross-sell products. Because it can access all the data you have on a customer, it can find other products or services the customer might like, just like Amazon's recommendations do. The difference is that, even though the bot's not a real person, it has a more personal, human-like touch.

To further improve customer service, you can program your chat bot so that it offers a way for a customer to get their questions answered if the bot is unable to do it adequately. At key points in the process, you can have the bot provide a phone number or email address where the customer can contact you directly.

Setting up a Virtual Agent

There are many software programs and services that allow you to build your own chat bot and manage it for you. You download the program and follow the steps to create your virtual agent. These services offer this with an easy-to-use interface since they know their users are not computer programmers.

Chat bot services offer a full range of customization options. Some allow you to choose an avatar from the templates they provide. Some allow you to upload your own image. Through the program's interface, you enter data, submit questions and answers, and "train" your virtual agent to interact with a customer.

In recent years, bots have become quite lifelike. Some higher-end services allow you to program your bot to do things like discuss today's weather, perform Google searches at the customer's request, tell jokes and so on. You can create something similar to Siri for your own website.

A couple of highly regarded software programs include:

- [IBM Watson](#) - *(Free open source program)*
- [IntelliResponse](#)

Chat Bots for Messaging Apps

There are also chat bots available for mobile messaging apps like Facebook Messenger and Slack. For example, Taco Bell now uses its TacoBot to make ordering easier through the Slack messaging app. If your customers are mostly using your service through a messaging app, this is a very good option.

A few services that allow you to create messaging chat bots include:

- [Chatfuel](#) – Chatbot creation for Facebook Messenger and Telegram
- [Facebook Messenger Platform](#) – For Facebook only and slightly more complex to program
- [Chattypeople](#) – A very easy to use chatbot builder for Facebook Messenger
- [Botkit](#) – Botkit supports a number of different messaging platforms

Brainstorm Time:

1. Identify the points of experience on your website that could benefit from chat bots.
2. Considering your brand voice, draft a dialogue that you'd like your chat bots to have with your customers.
3. Note the steps customers would take to progress their query to the next level in your customer service process.

Tap into the Power of Email Automation

Email automation is a great way to maintain contact with your customers throughout the sales process and after purchase. It helps you to establish and maintain two-way communication with your customers where you can address questions and issues, and get to know customers better so that you can anticipate their needs.

Email automation is done through a software program called an autoresponder. An autoresponder allows you to build a list of email subscribers, organise and manage this list, send out messages automatically to list members, and collect data regarding list members' behaviours.

Building Your Email List

The first step is to build your email list. You'll want at least one list for leads (people who are not customers yet) and one just for customers. Keep these separate since you'll send different content to each list.

To get people onto your customer list, there are several things you can do. If you're just getting started, advertise the list to customers who have already purchased your product, telling them it's where they can receive exclusive content and special offers. At the same time, set up a system for automatically adding new buyers to your customer list. Depending on your business, that may involve manually adding them (such as for an offline business) or setting up an integration (such as between a shopping cart and autoresponder).

When it comes to new leads, an effective method of list building is to offer a freebie to people who sign up for your list, and to offer list membership to anyone who signs up and downloads the freebie. This casts your net wide,

and serves as the wide opening of your sales funnel. Once you get people onto your list, you can build a relationship with them through the excellent service and value you provide. Their continued list subscription will qualify them as leads, leading to eventual sales.

Here are some tips and best practices for building your leads list.



Offer a Freebie That's Low-Cost to Produce but High Value. The strength of your freebie is the value it delivers to your ideal customer. However, creating your freebie presents costs money and can be a drain on your resources. The key is to offer something like a digital product that contains helpful content for your potential customers but, as a digital product, costs you little to make. Examples of good digital products include eBooks, video training courses, free webinars or one-on-one coaching, or free membership. The key is that it's exclusive and high-value.

Ask Only for Name and Email. When you offer a freebie and ask a person to sign up, don't ask for too much information. Now is not the time to gather information from them. You should make signing up as easy as possible, so

[Delivering Excellence](#)

only as for a name and email address. You can find out more about your list subscribers later.

Create a Website. It's good to create a website solely for the purpose of getting email sign-ups. Create a simple page with good copywriting that emphasizes the benefits of signing up for your list, and a sign-up form. Once they sign up, they should be led to the download page where they get the freebie. Once you have this site up and running, you can drive traffic to it from other sites. In addition to this site, you can embed your sign-up form on your website, blog, social media profiles, and anywhere else you have a presence online.

Guides, Follow-ups and Thank You's

The next problem is what kind of content to email your lists. You should decide well beforehand so that you can tell potential subscribers what they can expect. Your autoresponder program allows you to upload messages in advance so that they are ready to go out automatically to subscribers – whether they are new leads or current customers.

Say 'Thanks'

Start by sending a "Thank You" message thanking the new subscriber and reminding them of what they can expect from your emails. Either in this email or the next one provide your subscribers with a guide to your services. Offer any tutorials, FAQs, or other informational services you have in a way that's easy to understand and access with links. Focus on offering the information the customer or lead needs to get their questions answered so they don't need to contact you directly.

Just Checking In...

You should periodically send emails to your customers with similar information as the guides and tutorials mentioned above, but geared specifically towards their purchase and any problems they might encounter

over time. Send messages telling them you are checking in to see how they are doing. Your automated emails should ask if they have any questions or feedback for you. This encourages them to make the best use of your services and seek the help they may be hesitant to ask for. These messages also keep people on your radar and encourage interaction.

News and Updates

Whenever there is something new that might be of interest to your subscribers, send them a message informing them. This could be a new product line or a new service you're offering or new FAQ questions or tutorials. Try to update subscribers with information that will be specifically helpful to them and provide good customer service.

Regular Content

In addition to updates and customer service help, most email lists also send out content that's purely informational. This would be like the content you use for content marketing, but it should be exclusive to your list. They should feel that they're getting something special through the subscription. Focus on content that helps your subscribers solve their problems or make the best use of your services. This content should still be related to your business, but the main goal is to help.

A good way to improve your customer service through informational content is to take a question asked by one customer and answer it for everyone. Whenever you get a new question, write an email to send to all subscribers answering the question. If one customer asked, it's highly likely that others have the question in their minds as well.

Special Offers

Although the focus of your list might be to improve your customer service and build relationships through automation, you can also offer special deals and make sales directly through your list.

[Delivering Excellence](#)

First, exclusive offers such as special deals and discounts make your list special. This is an enticement for getting people to sign up and it also keeps them tuned in and paying attention. Second, in addition to direct sales, you can qualify your prospects and learn about them through making special offers.

For example, you might make an initial offer to new subscribers right after they've signed up. It might be a limited-time free trial of a new service you're offering. For the subscribers who aren't interested in trying a free service, you know that they're not likely to show interest in many other offers you make (although it could also be the nature of the service, which they might feel they don't need).

But those who take the free trial are those who are potentially interested in other offers. If you make an offer for a premium product with more advanced features and some of your subscribers buy it, you know that these subscribers are your best potential customers of further offers.

You can also use the list to up-sell or cross-sell. After a customer makes a certain purchase, you could set the autoresponder to automatically send a message offering a deal on a similar product that would also be useful to the customer. It could be something that enhances their current purchase, or something they didn't realise you offer, but which they might need.

As you can see from the examples, you're providing customer service solutions through email in an automated way, but you could also be making additional sales. With up-selling, cross-selling, and promotions, the key is to help the customer by anticipating their needs and then offering something that meets that need before they even ask for it.

Your Content Schedule

Your autoresponder service will allow you to create a message schedule tailored to each segment of your list, choosing which emails to send when.

When you get to know your subscribers well by gathering data through your interactions with them, you'll be able to offer just the help they need when they need it.

The key is to strike a balance between content that's purely informational and content that is promotional. In general, promotional content should be kept to a minimum. You can try making an offer and see how your subscribers react, but send promotional emails cautiously. If a business appears to be mostly promoting through its list, your customers will feel less valued. Focus the bulk of your email content on solving customer problems and making it easy for them to get their needs met.

You'll also have to consider the frequency of your emails. If you bombard your subscribers with multiple messages daily, you'll find your messages going straight into their spam folders. On the other hand, if you appear out of the blue once every month or so asking how your customer is doing, they're not likely to be very responsive.

Start by creating a tentative schedule, such as two emails a week, and then refine by watching your subscribers' reactions. You'll figure out what the "sweet spot" is in terms of frequency and best times to send messages.

Setting up Your Email List

A few of the best autoresponder programs available today include:

- [Aweber](#)
- [MailChimp](#)
- [GetResponse](#)
- [Infusionsoft](#)
- [ActiveCampaign](#)

Finally, make sure there is a way for customers to pursue their queries if they're not answered in your emails. Include a link or contact information in

[Delivering Excellence](#)

your initial email, as well as ways to reach you or a real live member of your support team in each email.

Brainstorm Time:

1. Draft your first few initial emails for lead and customer contact.
Include:
 - Post opt-in email (for signing up for a freebie)
 - Offer email (presenting an offer to a lead)
 - 'Thank-you for your purchase' email
 - Post-sale follow-up for onboarding and helping people find the information they need
 - Up-sell or cross-sell recommendations for products that will help the customer further
2. Returning to the FAQs that you drafted in the first module, think about which questions might be appropriate to include in each email.
3. Note the steps customers would take to progress their query to the next level in your customer service process.
4. If you don't already have an email autoresponder service, identify options, list pros and cons, and pick one to try.

Conclusions and Next Steps

In this short book, you've discovered a few new ways to automate your customer service and make life easier for both your customers and yourself.

You've learned how to:

- Automate certain aspects of your customer service to benefit not only your organization but your customers as well by creating quicker, more accurate, and more satisfying service
- Discover the common questions your customers have regarding your business and creating satisfying answers to these questions
- Anticipate questions that might arise regarding your organization and pre-emptively provide a solution
- Identify areas within your organization that could be clarified for customers with tutorials and how to create materials to explain them
- Develop and nurture a forum or group to encourage customers to assist one another with queries
- Explore ideas for using chat bots or virtual agents, and how you can implement this into your customer strategy
- Create emails that focus on developing customer relationships, as well as answering questions and providing solutions by anticipating email subscribers' needs
- Add options for customers to progress their query beyond the automated system if it doesn't adequately solve their problem.

Although automating your customer service offers great benefits to both you and your customers, it needs to be done cautiously. There are major pitfalls that can hurt your customer service if you fall into them.

Lack of focus on maintaining customer relationships

- Your real focus should always be on helping your customer

Not allowing for progression

- There should always be a way for customers to reach you or your support team if their query isn't answered to the customer's satisfaction

Lack of personalisation

- Even though it's automated, you should still make it feel as personal as possible

Setting it and forgetting it

- You need to update FAQs, tutorials, chat bots and email schedules as things change

Failing to anticipate needs

- Don't forget to use automation and other data to help them find more information

Too much focus on promotion

- Make sure you focus more on helping your customers than you do on product promotion

Lack of Focus on Maintaining Customer Relationships. Automating your customer service helps you by reducing the workload. You don't have to answer every query yourself personally. But the real focus should always be on making things easier for your customer.

Try to see your systems from your customer's point of view and ask whether it is helping or hurting your relationship with your customer.

Not Allowing for Progression. No matter what automation you use, there should always be a way for customers to reach you if their query isn't sufficiently answered.

There is nothing more frustrating than trying to get help and finding that there is no human being on the other side of the computer screen. Make sure they can still contact you when they need to.

Lack of Personalisation. Even though you're automating, you should still make it as personal as possible. For example, in your emails, use the subscriber's first name. Always try to get to know your customers on a one-on-one basis and customise to individual customers whenever possible.

Setting It and Forgetting It. Once you create your FAQs, tutorials, chat bots, and email schedules, you're not finished. Most of the background work is done, but you'll still need to update the information as things change.

These changes could be internal to your company, such as the answers to the questions, or it could be in response to changes among your customers. For example, they may be switching to mobile devices to access your site and you would then need to provide solutions geared toward these devices.

Failing to Anticipate Needs. Don't forget to use automation and the data you collect on your customers to help them find further products and services through up-selling and cross-selling. You have a great opportunity here to meet not only present customer needs but future needs as well.

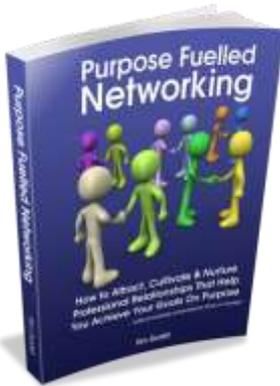
Too Much Focus on Promotion. Make sure your efforts are focused on helping customers and not promotion. Too much promotion looks bad to your customers.

Now, with the ideas that you've generated through your brainstorming and the knowledge you've learned, you're now ready to start scaling up your customer service.

Brainstorm Time:

1. Review all the ideas you generated through your brainstorming.
2. Plan your next steps and deadlines for implementing your new and improved customer service processes.

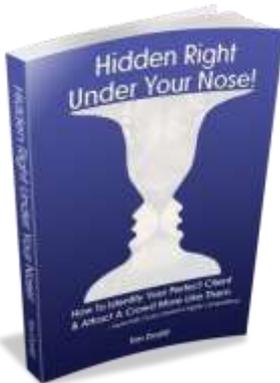
Before you go, here are a few more books & courses that you may find useful if you run a professional services business...



Befriend Professionals Who Will Happily Introduce You To Potential Clients

[Purpose Fuelled Networking](#)

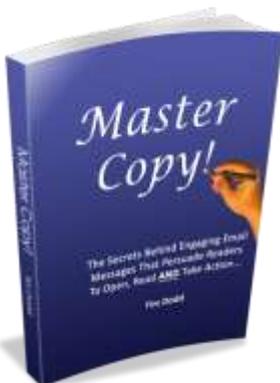
How to Attract, Cultivate & Nurture Professional Relationships That Help You Achieve Your Goals On Purpose



Clients Are Everywhere, Provided You Know Who You're Looking For!

[Hidden Right Under Your Nose](#)

How To Identify Your Perfect Client & Attract A Crowd More Like Them



Structure Your Email Communication In A Way That Turns Recipients Into Clients

[Master Copy!](#)

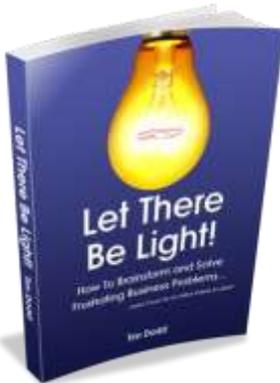
The Secrets Behind Engaging Email Messages That Persuade Readers To Open, Read AND Take The Action You Want



Understand How Customers Arrive At Their Decision To Buy

The Secret Sauce

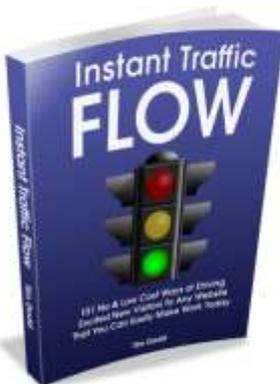
The Simple Sales Psychology All Great Marketers Use To Persuade Customers To Buy From Them



The Key To Business Success Is The Ability To Solve The Problems You'll Encounter

Let There Be Light!

How To Brainstorm and Solve Frustrating Business Problems Even If You've No Idea Where To Start.



Drive Web Traffic At Will and Scale Up Your Business Fast

Instant Traffic Flow

101 No & Low Cost Ways of Driving Excited New Visitors To Any Website That You Can Easily Make Work Today

[These & several other books are free to download from www.3dconsultingservices.com/resources/](http://www.3dconsultingservices.com/resources/)

About the Author:



Do you ever wish you could find an easier way to attract new clients?

If you're thinking "Yes, I do!" you're not alone. Many professional service providers feel like that because they are experts in providing the service that they're qualified to provide, rather than in the selling of it.

As our paths may not have crossed before, let me introduce myself. I'm Tim Dodd, a former chartered accountant and a specialist workflow process consultant. Basically, what I do is advise clients on suitable processes to use when they want to attract a consistent flow of new business on auto-pilot!

If you're a business owner or professional service provider, who likes the sound of having leads generated, prospects followed-up with and client relationships built automatically so that you and your team can spend more chargeable time working with key, fee-paying clients, then I believe I can help you.

Or maybe you like the idea of automating these vital business processes but aren't yet convinced that it will work in your specific market.

No matter which, if business automation is of interest to you and you feel that a no strings chat might be helpful, then please head over to

www.3dconsultingservices.com/call

and book a time that's convenient time for you when I can tell you more.

There's no charge, and I guarantee you'll be both amazed and delighted by the tools we'll talk about and the boost in productivity and profitability that your business could easily enjoy.

I look forward to speaking with you soon.

Tim

At some point in their life, everybody will have been accosted in a shop by an eager young sales assistant desperately trying to sell them something they really didn't want! No doubt, you'll also have received loads of direct mail through your letter box from marketing companies, trying to persuade you to buy some new, miracle product or other from them. And I'm almost certain you'll have come across those long, rambling, seemingly never-ending web sales pages that have you scrolling down forever & ever.

If you're a professional services provider, like me, you'll absolutely hate the thought of being categorised alongside any of the above. Yet, finding and winning new business is becoming more and more competitive. And, no matter how much we dislike it, we all have to sell something in order to survive.

When I first started my consulting business I used to feel exactly the same way I imagine you're probably feeling right now; overwhelmed by everything you know should really have been done by yesterday!

However, everything changed for the better, when I engaged a truly inspiring business coach with an unthreatening, future focussed, education-based coaching style that enabled me to discover several hugely effective strategies of my own. Strategies that have been proven to work for virtually any type of professional service provider with an online presence.

The most important of these are my client finding strategies. Clients are all around us. The secret is to have a process that quickly enables you to identify who will be the best clients for you and how you can discover where they'll all choose to congregate together!

If you don't already have an effective client getting process that's working well for you and you want to learn how to identify who your perfect client is and where you can find more people who meet your ideal client's profile then you'll quickly realise that this book was written specifically with you in mind!

Just a quick word of advice: Make sure your business can handle a rush of new clients, always provide outstanding service to every client who engages you and understand that, above all, the secret of success is to have fun!

