

Maintain Key Information on Customers

Few salespeople can instantly recall everything they need to know about a customer when he walks back into a store—even if he's a frequent shopper. If you want to succeed in offering great personal service to customers, you will rely on maintaining a record of needs, preferences, and other information that customers willingly share with you.

Keeping a client record... This will be your method for recording information about customers. You may want to start with friends and family members who may become your frequent customers. This record system will contain basic information that allows you to stay in touch with your customers. It will also contain specific information that helps you to deliver personalized assistance, such as notifying your customer when you see a new item come into the store that might be of interest to her. Let's say you have a customer who buys large quantities of a high-priced brand of panty hose twice a year. You will become her favorite sales associate, someone she depends upon, when you call her, send her a postcard, or e-mail her to let her know when there's a 20 percent discount on this brand.

Your client record system may be a notepad, a computer file, a card file, a folder, or a simple three-ring binder with a separate page for each customer. Use the type of recording system that works best for you. The important thing is to collect information and keep it up-to-date.

SAMPLE CLIENT RECORD

Office Objects, Inc.

"we make your business our business"

Sales Associate: Kim

Customer name: Mr. Flanders

Work phone: 327-2375 **FAX:** 327-2300

Company Name: Tech Trainers

Mailing Address: 100 Union St. Suite 400
Fairhaven, CT 08118

Type of Business: Business Training

Special Requests:

- 3/5/97 Looking for 10 bin paper organizer for document storage, white, no larger than 3' H x 4' W
- 4/3/97 Found in Spring '97 catalog, item # 557-9805, \$59.99. Called customer and ordered.
- 12/11/97 bought new MP5000 printer and one extra cartridge
- 2/15/98 ordered additional cartridge; high volume use — notify of cartridge specials

Special Services:

- 4/18/97 Had paper bin delivered and assembled.
- 2/15/98 Placed on mailing list for sale notification.

What to record... You can begin by recording information about potential customers—friends and family, even people who come into your store but don't buy anything. If they are looking for a specific item but don't find it, make a note about their request in case you can help them later. Record any purchases your customers make so you can begin to understand their shopping habits. In addition, use this record to keep track of your follow-up activities. Include notes about any sale notices, coupons, thank you cards, promotional announcements, invitations to demonstrations or workshops, etc., that you've sent to each customer. If you know certain customers have responded to your special notices, make a note of that as well. You will remember to include them in future special activities. Some professional sales associates try to recognize special dates in the lives of their customers, such as birthdays and anniversaries, with a card or special offering.

Basic ingredients... Your client records should contain the following basic information for each customer:

- Name
- Address
- Telephone
- Occupation (or hobbies, collections, activities, projects, or other interests that influence buying preferences)

Next, add information that will help you to maintain a current profile of the customer's personal preferences and needs. For example:

- Date and type of first purchase or contact. What was the customer shopping for? Did he or she buy anything?
- Preferences or specifications. Are there size variables by brand name or type of item? Color or style preferences? Label or brand-name preferences?
- Special considerations. Is your customer allergic to certain fibers? Does she travel a lot? Does he work the night shift?
- Does your customer prefer to have goods delivered? Assembled? Serviced regularly?

Reviewing to discover opportunities... You will want to review the information in your client records regularly. New opportunities may suddenly arise. For instance, your notes say that John Nesbitt has been looking for a recliner that doesn't look like a recliner. One has just arrived in your department. This is your opportunity to shine as the most thoughtful sales associate he's ever encountered. You may also have new ideas of ways to help customer Della Moore improve the efficiency of the home office she is setting up—you've just found a desktop shelving system that has everything!

“*The only person who behaves sensibly is my tailor. He takes new measurements every time he sees me. All the rest go on with their old measurements.*”

—George Bernard Shaw, English playwright and author

Keep it new...As you've probably guessed, your collection of customer information is a “living” record. Customers' preferences, needs, sizes, etc., may change considerably over time. Just as you keep up with friends and family, it will be vital for you to keep up with your return customers. Record every new bit of information you receive—whether it's that Sally Mason has moved from the city to the suburbs, Joe Pascal is now self-employed instead of a corporate guy, or Maria Martinez has decided she never wants to wear black again.

Keep it confidential...Privacy is important to everyone. As a sales associate, you may learn some very personal things about your customers. Be careful about what you say to others. Even such information as dress size or birth date is very personal. Never leave your client records on the counter. Check with your manager to see what the store policy is about storing this information; perhaps a locked cabinet or individual locker can be provided.

It is not up to you to decide what information about the customer should or should not be private. Keep all information that you gather about your customers confidential. Do not share customer information with anyone—even co-workers—without the customer's knowledge and permission. A customer will have more confidence in you if you respect his privacy. Types of confidential information that you may learn and should never share without the customer's permission:

- Home address and phone number
- Credit card numbers
- Times the customer is or is not home to accept a delivery
- Sizes
- Birth date
- Occupation or place of business



CREATING A CLIENT RECORD

Using this template, begin creating a client record by noting as much information as you can about one of your customers.

If you are not currently working as a sales associate, practice creating a client record by gathering information about someone you like to shop for—perhaps someone for whom you buy birthday, holiday, and special occasion gifts.

confidential

Client Profile

Name: _____

Address: _____ Phone: _____

City/State/Zip: _____ Birthday: _____

Work: _____ Title: _____

Email: _____ Fax: _____

Contact Restrictions/Requests: _____

Personal Profile (preferences, sizes, etc.): _____

Buying History: _____

Recent Requests/Status: _____

*Additional copies of this form are included in the back of this workbook.
Use them to begin creating your client record system.*