



80 Keeping customer records

What is a customer record?

Customer records contain important information vital to maintaining an ongoing relationship with your customers. These records will contain customers' full name, company name, address, telephone, mobile, fax, email, website, birthday, business information, work/client history, samples of work, personal information (as appropriate) and spending patterns.

Customer records can be stored on a database or customer relationship management (CRM) system. There are many good* CRM systems on the market today which will enable you to store, access and manage your contacts and communicate with these customers.

Why is this important?

Your customers are your business. Your existing customers form the bedrock providing the foundation from which to grow. Your prospects are your future. The only way you are going to be able to build your relationship with these people is to communicate with them. If you are to do that effectively then you will need a system. Any system starts with customer records. Names written on scraps of paper, held in your head or contained in your inbox is not an effective way to manage your database. It can be extremely time-consuming to operate in this way and you will end up continually chasing your tail. If you have full and detailed customer records you will be able to understand your business better. You will be able to analyse spending patterns and see trends. This information can help you with your future business decisions and marketing activities.

Your challenge

Your challenge will be firstly in choosing and setting up a customer database or CRM system that suits your needs, and secondly in maintaining the discipline required to capture, store and update your customers' details.

How to get your customer details

Depending on how you normally take customer orders you will need to make sure that you and your team develop an easy way of getting all the information you need

at the same time. When a person becomes a new customer they expect to be asked for their details. They have made a decision to buy and at that moment are likely to feel the greatest connection. They could be interested in the potential value of being kept informed, supported and in touch by the company that they have just done business with.

- Ask for full customer details at the point of sale.
- Get into the habit of doing this and create a system that works and doesn't take the customer too much time.
- Take electronic details if you can – if not write in capitals.
- Make sure you give them a good reason for taking their details.
- Make sure everything is spelt correctly.
- Make sure your customers are called at least once a year and their details updated. This provides another valuable communication opportunity.
- Make sure whoever is responsible for keeping the customer records up to date does it religiously. It is much easier to do it day by day than it is to leave it, let it build up and risk losing information.

HOW GOOD ARE YOUR CUSTOMER RECORDS? – SPECIAL RESPONSE CHECKLIST

- ▶ How do you keep customer records?
- ▶ Is the system you use user-friendly?
- ▶ How up to date are your current records?
- ▶ Do your records contain all the information you need?
- ▶ What additional information do you need?
- ▶ How often do your records get updated?
- ▶ What could you do to improve your customer record keeping?

How to use this information

Every customer you get has a life-time value. That life-time value will only be fulfilled if they are kept happy, contented and communicated with. Use this information to prompt an honest appraisal of your current customer record system. Do what it takes to make your system work in the best way possible.

Think customer records and make constant contact easier

*If you would like information about the Fast Track marketing system we use, email us at admin@marketingco.biz