**Customer Relations Worksheet**

Review the table categories to find the ones applicable to your company, products or services. Check or type Yes in the Applies column for each line item that applies to you. Then, go through a second time while reviewing your website, policies, procedures or other marketing and regulatory documents to see where and how you can improve.

**Help Customers Make the Right Purchase**

***All Websites***

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| --- | --- | --- | --- |
| Applies | Done | Information | Notes |
|  |  | Price | Customers need to know the price, and while many business owners don’t want their prices known to competitors, not providing this information will deter customer contact. If there is a fixed price for the item or service you provide, put it on your website. If there are a number of factors that go into the final cost, provide a form for customers to request a quote. |
|  |  | Currency | If you sell online, remember that your website visitors could be anywhere in the world. Add the currency symbol to prices or put a note an easy to see note on the page. |
|  |  | Service/Delivery Area | Again, your website can be viewed globally, even if you only provide service in one location. It wastes everyone’s time if you don’t make it clear where you provide your service or where you ship to. Also remember to include the province/state and country. (As one example, there is an Abbotsford in Quebec too.) |
|  |  | Service/Delivery Time | While most consumers do want their product or service sooner rather than later, it’s better for them to expect the worst and be happily surprised. During any high-volume sales periods (e.g. Christmas, Valentine’s Day), put “order by” dates on your website. If you provide any emergency type services, make it easy for customers to get in touch with you, and again, be honest about how soon you can get to them. |
|  |  | Shipping Cost | It’s impossible to know what shipping costs are going to be until you know the full order and where it’s going. That said, it’s very helpful to have a section on your website that gives as much information as possible, along with some examples. E.g. The average cost of shipping one clothing item within Canada is $6.00. Free shipping with a minimum order is also something you should analyze and offer if feasible. It’s a great upselling tool. |
|  |  | Return Policy or Satisfaction Guarantee | Let consumers know what will happen if they are not satisfied. If you sell something that cannot be returned, make sure that is made clear before the sales transaction. |

***Apparel***

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| Applies | Done | Information | Notes |
|  |  | Images | Showing item images is obvious, but many sites don’t provide enough images. Think about what a consumer wants to know about the specific item, and provide images to answer those questions. For example, show the back of a clothing item, as well as the front. For something like a handbag, show the inside as well as the outside. |
|  |  | Size and Sizing Chart | Providing size options is useless if you don’t provide a sizing chart; and you may have to have a different chart for each manufacturer. This will considerably reduce the number of returns and exchanges, and increase the number of happy customers. |
|  |  | Colour | Every device has a different colour profile, so you can’t rely on images to show the colour of items. Don’t rely on the manufacturer’s colour name either. Describe it the simplest relatable terms you can. “Pumpkin orange” provides usable information. “Delta Sky” doesn’t. |
|  |  | Fabric and Care | The two main questions to answer are what materials are in the fabric, and can it be washed. Many consumers will only buy items made of natural fabrics such as cotton or bamboo. If all of your apparel is made from a certain natural fabric, be sure to note that visibly on your site, and use that fact in your marketing. If most of your items are washable, just make note of the ones that are dry clean only. |
|  |  | Coordinating Items | This is another upselling technique and can be accomplished with a content management database. For example, when a customer clicks on a sweater for more information, the matching scarf and hat also appear in a side bar or below the main item. |

***Household***

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| Applies | Done | Information | Notes |
|  |  | Features | Include both core and additional features, as it’s often the details that solidify the decision to purchase. For example, a coffee maker is expected to make coffee. If it can also auto-brew at a specified time, that’s a bonus. If it can also make tea by using loose leaves instead of coffee grounds, that might be what tips the scales in your favour. |
|  |  | Dimensions | Dimensions are important, even for things like a coffee maker. If it’s too high to fit on the countertop under the cupboards, it might be coming back to you. |
|  |  | Colour | (Same as apparel) Every device has a different colour profile, so you can’t rely on images to show the colour of items. Don’t rely on the manufacturer’s colour name either. Describe it the simplest relatable terms you can. “Pumpkin orange” provides usable information. “Delta Sky” doesn’t. |
|  |  | Electrical Requirements | This covers things like voltage where standards vary in different parts of the world, as well as safety issues like not using an extension cord. It’s best to tell consumers upfront, if there are any constraints in utilizing the item. |
|  |  | Images | As with apparel, provide more than one image, or include an illustration that covers what consumers want to know. |

***Services***

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| Applies | Done | Information | Notes |
|  |  | Service Description | It’s not enough to say that you are a plumber or a lawyer. In addition to helping search engines match your website with consumer search terms, it also helps potential clients if you give examples of services you provide, and particularly any speciality areas. For example, furnace repair or writing a will. |
|  |  | Portfolio or List | Examples of your past work or list of services are important, particularly if you are in an industry where there is often confusion. For example, a spa massage is very different from a therapeutic massage. Use your website to give answers to the typical questions people ask you. |
|  |  | Credentials | While few potential clients will actually fact check, be honest and provide sufficient details about your education and training. If you are in a discipline that has a regulatory body, make sure your information is up to date on that website too, as it may be used to verify your credentials and can also be a marketing tool. One example is the Home Inspectors Association BC, <http://hiabc.ca/>. |
|  |  | Contact/Appointment | Let consumers know how long they may have to wait for an appointment, or if you are available on short notice. Don’t advertise online appointment “booking” unless you actually have a system to do that. Call it an “appointment request form” and give the option to negotiate a suitable date and time by phone, email, or text. |

**Exceed (or at least meet) Their Expectations**

***Products***

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| Applies | Done | Information | Notes |
|  |  | Contents | If the item has numerous parts, a list of what’s supposed to be in the box is very useful, particularly if that list is the first thing the consumer finds. Pay close attention to repetitive complaints about missing items. Obviously, if they are actually missing, you have a different problem than if the missing item is getting thrown out inadvertently because of the packaging or placement in the box. |
|  |  | Assembly | Global companies are big fans of using illustrations only, which certainly cuts down on translation and paper costs, but aren’t always enough to ensure a smooth assembly process. If you go this route, supplement with additional information on your website. Written instructions should be at a Grade 4 to 8 level, and videos can also be very helpful. If you can afford to have staff available to provide support by telephone, that will also be appreciated. Instructions take time, effort, and money, but there is a return on investment with happy customers, fewer complaints and returns. |
|  |  | Other Set Up | You really can’t make any assumptions about what consumers will and won’t know about your product. Even if all they have to do is insert batteries, tell them what kind, where they go, and how to properly open the battery compartment. |
|  |  | Use, Care and Maintenance | Use, care and maintenance instructions provide a dual purpose. First, they help consumers make the most of the item, which reinforces its value, which in turn fosters repeat business. Clear instructions also put the onus on the consumer for the longevity and durability of the item. If they don’t follow the instructions and something goes wrong, many will accept that as their own doing, decreasing the number of complaints and returns. |
|  |  | Trouble Shooting | Trouble Shooting guides are incredibly useful to consumers and so often fail to include the most frequent problems or sufficient information to rectify the problem. If you have your Trouble Shooting guide online, you can update it as often as needed, knowing that if you got one phone call, there are likely dozens of others with the same issue that haven’t contacted you. |

***Services***

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| Applies | Done | Information | Notes |
|  |  | Completion Debrief | The amount of detail you provide will vary with the type of service, but the point here is to tell the customer what you’ve done or completed. For example, if it was a furnace repair, tell them you’ve replaced the ignitor. If a Will was prepared, you’ll want to review the entire content of the document. The debrief reinforces to the client that you have met their needs and provided something of value, and also provides an opportunity to catch any errors or omissions. |
|  |  | What to Watch For/ Future Service Recommendations | If anything is likely to be different or could be unforeseen by an uneducated client, explain what they might encounter. Perhaps the furnace will sound a bit different, or they might experience a temporary increase in pain after a massage. If there’s a chance of something specific going wrong, tell them what to watch for – the smell of natural gas or a severe pain – and what to do about it. This is also a great time to recommend future services and provide a discount or other incentive. |
|  |  | How/When to Use | Even when a client knows they need something, they may not know how exactly to make use of it. For example, you’ve prepared a Power of Attorney for a client to take care of an elderly relative’s affairs: they may not realize that they need to take, send, or register a certified copy with every bank, utility company, credit card provider, etc. etc. Providing this information in advance can save them hassles they may blame you for, warranted or not. |

***Friendly Follow Up***

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| Applies | Done | Information | Notes |
|  |  | Methods | To follow up on a sale and stay in touch with a customer, you need to have a method of contact. The easiest way is to ask for an email address. If the customer doesn’t want to give that to you, provide a card, flyer or QR code they can scan with their smart-phone of ways for them to follow you on social media, when your sales flyers come out, or when new items are usually posted to your website. |
|  |  | Thank You | For small or frequent purchases, a “thank you” at the time of purchase is all that’s needed. For major purchases, whether online or in-store, a follow up email can be used to cover all of the four key messages. |
|  |  | Incentive | Discounts on future purchases are a great way to encourage repeat business. If that’s not feasible, provide a short list of other services you provide, particularly money-saving packages. |
|  |  | Request Feedback | The best way to ensure that unhappy customers contact you first and directly, is to provide a contact number or email address with a promise to respond promptly. E.g. “If you are not completely satisfied with the order received, please contact our Customer Satisfaction Department right away by phone or email and we will happily rectify the issue.” Of course, you have to follow through on that promise, but it’s a small price to pay for avoiding the bad publicity that will follow if you don’t.  Also, encourage positive feedback either back to you or on a platform you’d like to promote. E.g. “We trust that you are delighted with your order and would greatly appreciate you sharing what you like about our products by writing a Google review here (URL).”  Particularly for newer businesses, this is an opportunity to ask for suggestions about your website, processes, products or services. Remember, it’s free advice from those whose opinions matter most. |
|  |  | Invitation to Stay in Touch | Creating a community around your brand is a very effective and efficient marketing tool. Make sure though, that you have a well-conceived plan in place, preferably with options. Some examples:   * A regular newsletter or article by email with information of interest to your customers. * A regular blog on your website, with an email or message notifying of the post. * A Facebook page with photos of new items or volunteer work your company is doing in the community. * Twitter or other social media notices of flash sales, or exclusive offers. |