

"WOWING" CLIENTS FROM ONBOARDING TO OFFBOARDING

slowerton
Wooten
EVENTS



the
ENLIGHTENED
CREATIVE

“Just having satisfied customers isn’t good enough anymore.

If you really want a booming business, you have to create raving fans.”

HI! I'M KAWANIA

30 YEARS OF CONFERENCE AND
EVENT PLANNING

15 YEARS OF PLANNING
WEDDINGS

I'VE OWNED AND MANAGED
HOWERTON+WOOTEN EVENTS
FOR 15 YEARS

7 YEARS AS AN ADJUNCT
INSTRUCTOR



WHY IS THIS IMPORTANT?

YOUR CLIENTS WILL FEEL HEARD

CLIENT RETENTION INCREASES

YOU CONNECT WITH YOUR
CLIENTS ON A PERSONAL LEVEL

YOU DEVELOP A BETTER
UNDERSTANDING OF YOUR
CLIENTS' NEEDS AND THEIR PAIN
POINTS



THIS IS WHERE THE MAGIC
HAPPENS

ONBOARDING YOUR CLIENTS

- Make sure your team and processes are in place.
- Send a warm welcome
- Host a kick-off; give homework; and host tutorials
- Surprise them with a little love
- Schedule milestone celebrations



YOU ARE THE ALPHA



COMMUNICATION TIPS

- Onboard Your Clients with a Kick Off Discussion
- Weekly Progress Reports
- Follow Up E-Mail to Each of Your Phone Calls
- Follow Up when Something Goes Wrong
- Pick Up the Phone
- Remember to Say Thanks



EDUCATE CLIENTS WITHOUT OVERWHELMING THEM

- Think of Your "Most Asked" Questions
- Quick and Easy Bullet Point Instructions
- Provide Them with An Educational Calendar
- Create Video Tutorials; Educational Webinars; and One-on-One Tutorials



**ASK
AN
EXPERT**

HOW TO LEAD SUCCESSFUL MEETINGS

- Avoid scheduling meetings that can be addressed with an email or a quick phone call
- Be mindful of the meeting time. Avoid meal times, and times that are too early or too late in the day.
- Be quick. Stay on topic. Save the chit chat for the end of the meeting or another time.
- Finish the meeting with a summary of the discussion and next steps.

SHOW THEM THE LOVE



GET TO KNOW YOUR CLIENTS – DO YOUR RESEARCH

- What's important to them?
- How do they communicate?
- How do they work?
- Check in Frequently
- Ask for Feedback
- Create Accountability



DISNEY'S SEVEN SERVICE GUIDELINES

- Be Happy...make eye contact and smile!
- Be like Sneezy...greet and welcome each and every guest. Spread the spirit of hospitality...It's contagious!
- Don't be Bashful...seek out guest contact.
- Be like Doc...provide immediate service recovery



DISNEY'S SEVEN SERVICE GUIDELINES

- Don't be Grumpy...display appropriate body language at all times.
- Be like Sleepy...create DREAMS and preserve the "MAGICAL" guest experience.
- Don't be Dopey...thank each and every guest!



SETTING BOUNDARIES

- Details your services in the proposal and in the contract
- Put systems and processes in place before you begin
- Have proactive conversations with your team and your client
- Determine and reiterate hours of operation in advance



SETTING BOUNDARIES, PT. 2

Identify scope creep. Address it immediately

Set and reiterate behavior expectations.
Follow your own rules

Say "no" when you need to, and be willing to walk away

Put a buffer between you and the client



WAYS TO MAKE IT EASY FOR CLIENTS TO SUPPORT YOU

- Make sure your clients know the best way to reach you.
- Give your clients a "suggestion box."
- Create positive relationships with your clients
- Try to remain on their "top of mind."
- Make it easy for your clients to help you



START STRONG; FINISH
STRONG



"IF YOU OFFBOARD YOUR CLIENTS AS WELL AS YOU ONBOARD THEM, YOU MAY BE ABLE TO TURN THEM INTO YOUR AMBASSADORS."

PROPERLY OFF-BOARDING YOUR CLIENTS

- Clearly identify the end of your service
- Make it easy for your couples to leave you.
- Give homework
- Give one more "wow" before you sign off.
- Send a final invoice and let them know If you gifted them with a "freebie"
- Send a thank you card and/or gift
- Ask for feedback, reviews and referrals
- Remind your client of your legacy services
- Stay in touch



THANK YOU!

Kawania Wooten
Howerton+Wooten Events
and the Enlightened Creative

