Do you know what your clients expect from you?

Everything you need to know about delivering a better experience

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Introduction

As a small business owner, you've most likely run into a situation with an unhappy client, and you know how frustrating it can be, especially if you rely on word of mouth and review sites like Yelp to acquire new clients.

While customer service is important, it's no longer just about customer service. Consumers have come to expect excellent service before they become a client and while they're a client. They pay attention to how you interact with them and the details that go into providing them with excellent service because they want to buy from people they feel like they can trust and develop a relationship with. In our 2018 Value Outcome Survey we found out that 70 percent of small businesses think clients are more demanding today than in the past, and 80 percent say clients expect small businesses to be available around the clock, online, and by phone.

The reactive customer service approach no longer works. These days, the proactive customer experience approach is the most important thing you can focus on to turn leads into loyal clients, close more business, and make your business stand out in a competitive market.

In this guide, you'll learn about:

- What clients are looking for and what they're saying about their experiences with small business service provides.

- Tips and strategies you can start using to help you turn leads into satisfied, loyal clients, and mistakes to avoid.

- Using the right software to help you deliver a better experience.
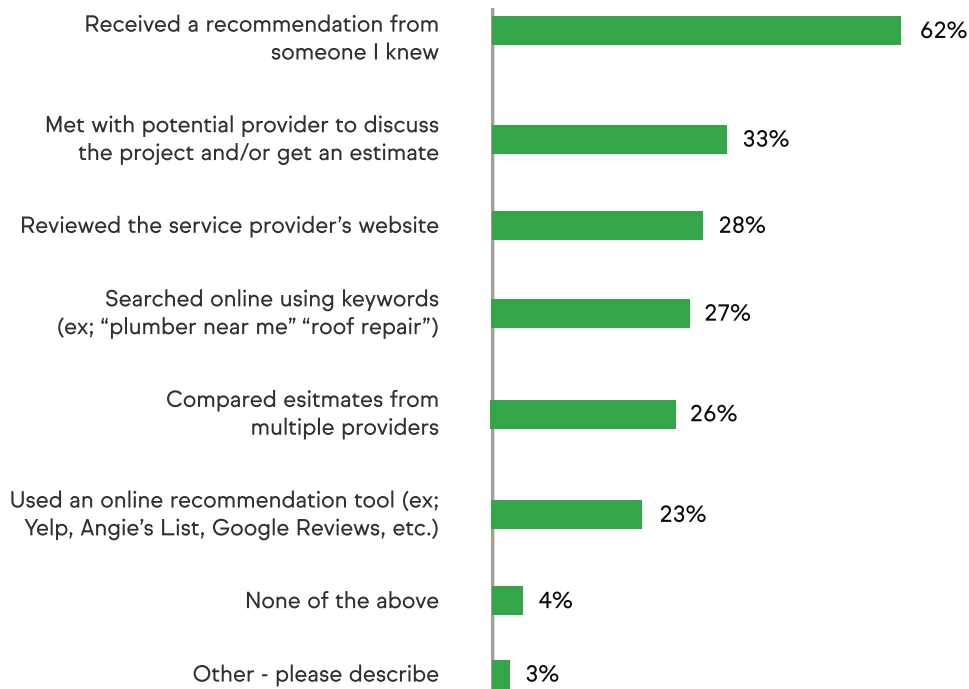
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What are clients saying and what do they want?

In December 2018, we conducted a Client Service Expectations Study and surveyed 3,000 people across the United States who hired a service-based small business to find out what they considered good and bad service, and how their expectations are being met or not met by small businesses.

Study results

How people find service-based providers

We know referrals from friends and family are powerful, and the results of this survey confirmed it even more. It's the top method people use to find service-based small business providers. Sixty-two percent of people receive a recommendation from someone they know when they're searching for a service provider, and 89 percent hire someone who was referred to them. This shows just how important it is to create an experience that results in loyal clients who will refer people to your business.
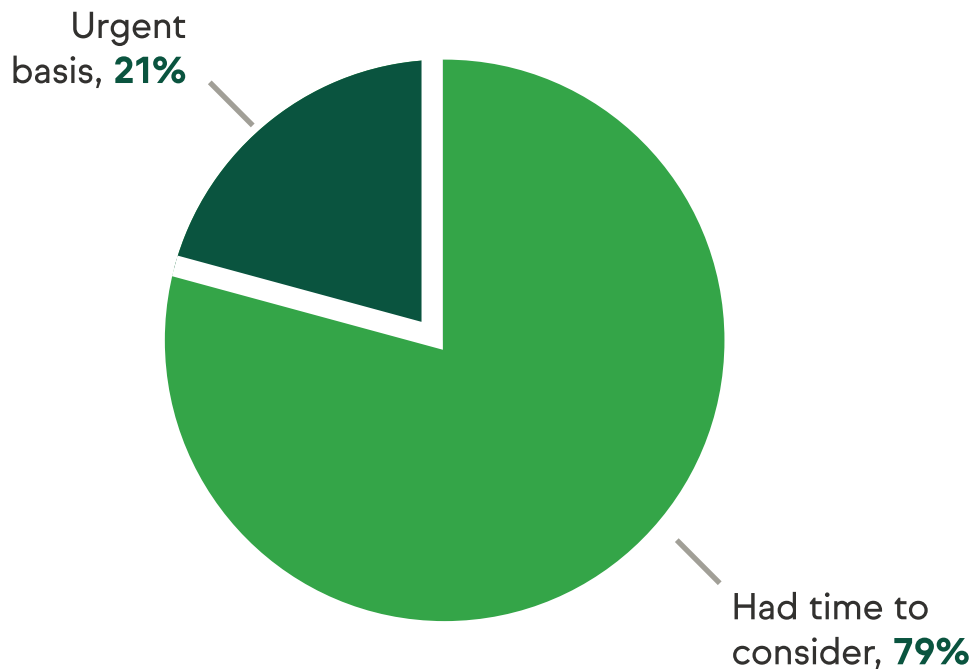
How people find service providers

Received a recommendation from someone I knew	62%
Met with potential provider to discuss the project and/or get an estimate	33%
Reviewed the service provider's website	28%
Searched online using keywords (ex; "plumber near me" "roof repair")	27%
Compared esitmates from multiple providers	26%
Used an online recommendation tool (ex; Yelp, Angie's List, Google Reviews, etc.)	23%
None of the above	4%
Other - please describe	3%

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Time people spend on choosing a service provider

When looking for a service-based business, the majority of people (79 percent) spend a sufficient amount of time considering service providers before making a decision, while 21 percent make a decision on an urgent basis. This is the time where it's critical for small business service providers to take proactive steps to develop relationships with leads and let them know they're not just trying to win their business for the money, but they're willing to earn their trust and confidence.

Decision timeframe

Urgent basis, **21%**

Had time to consider, **79%**

Number of service providers people consider before making a decision

There's no doubt about it. People "shop around" when looking for a service provider. More than half of the respondents (69 percent) will seriously consider one or two service providers before making

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their final decision while 29 percent will consider three to five. Small businesses have to differentiate themselves and stand out from the competition—even if the competition is one service provider. Rising above the competition and turning leads into clients requires quick follow up with leads and providing the same quality of care clients receive is necessary to make an excellent first impression.

69%

29%

2%

1-2   3-5   6 or more

Number of service providers service considered
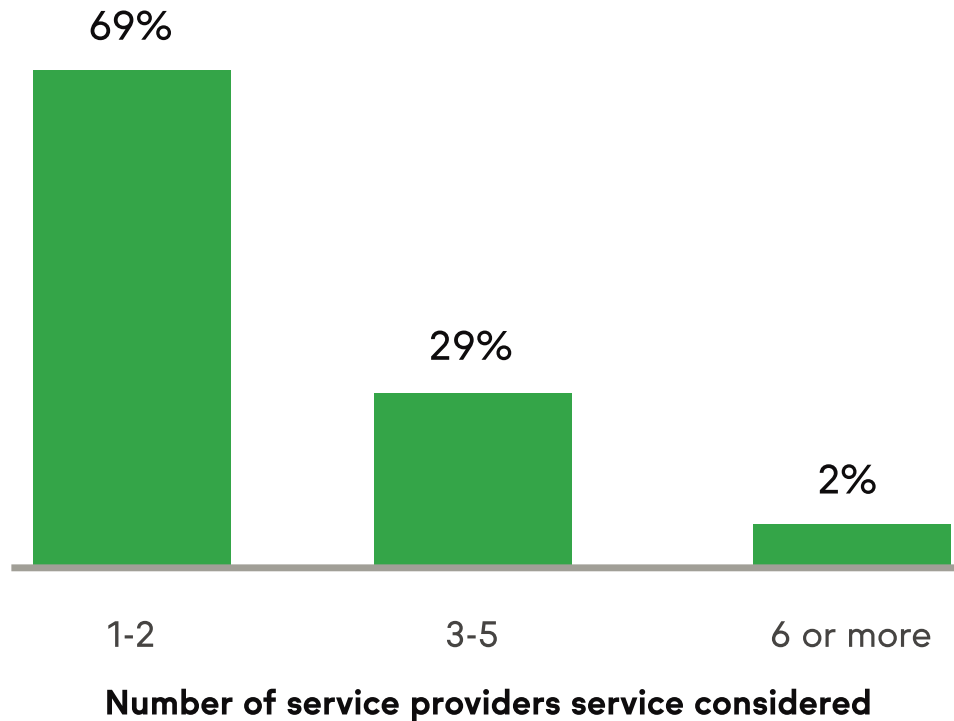
Top qualities people are looking for in a service provider

We asked survey respondents to choose the most important qualities they look for when choosing a service provider, aside from receiving the right service at the right price. The eight qualities they had to choose from were: dependability, pride/spirit, expertise, likeable, responsiveness, accommodating, professional, and trustworthy. Almost all respondents (97 percent) ranked trustworthy and dependable as the most important qualities in a service provider. Just like everything else in life, people want to work with people they can trust and rely on. When small businesses think of leads as people they're building a relationship with versus winning their business, that's when the magic starts to happen.

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Top 5 qualities people look for in a service provider

1. Trustworthy

- Straightforward and truthful information is provided at all times
- There's no hidden agenda or feeling like information is being left out
- There's no question I'm in good hands

2. Dependable

- A business I can count on to provide reliable and consistent quality service
- I can place my trust in this business during times of uncertainty
- They do exactly what they say they're going to do

3. Expertise

- They demonstrate knowledge of the problem I'm trying to solve
- We both are able to learn from each other
- I'm confident I'm getting value for my investment

4. Responsive

- They're there when I need them
- They quickly respond to requests and resolve problems
- They make me feel like I'm the only customer even though I know I'm not

5. Professional

- They show up professionaly at every interaction
- Every interaction gives me reassurance they're doing what they said they would
- They're respectful and open, even during times of conflict

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Top reasons why people don't choose a service provider

When making a purchase decision, it's not always about how much it's going to cost or one quote versus another. Almost half (44 percent) said they didn't hire a service provider because the provider either didn't follow up with them or was slow to return calls or emails.

With digital technology and real-time information at consumer's fingertips, there's no time for "I'll get back to you later" anymore. People expect an immediate response all day every day; otherwise, they'll move on to the next business—the competition. Following up at the right time is crucial, but that can be incredibly challenging for small businesses. Fortunately, technology has come a long way for small businesses and there are many helpful tools that can help small businesses meet consumer expectations.

Customer satisfaction

Of all the survey respondents, the ones who were most satisfied are people who:

- Took more time to choose a service provider

- Used a service provider on a recurring basis

- Were referred to a service provider

Eighty-six percent said they were satisfied with a provider who was referred to them or was a provider they use on a recurring basis.

The top five qualities we mentioned above directly tie in with customer satisfaction. Naturally, people are satisfied with someone they can trust, depend on, and view as an expert in what they do. As a small business owner, building trust and dependability while showing prospective clients you're an expert at what you do will help you close more business and get repeat business, while creating an experience that goes above and beyond client expectations.

Fun fact: According to the respondents in our survey, pet care and beauty services are the industries with the highest customer satisfaction. Who doesn't love a freshly-groomed pet or a spa day?

Advice from service provider clients

When we asked survey respondents what advice they would give service providers, here's what they had to say:

- "Treat your last appointment like your first … they shouldn't feel rushed and end up with a lousy product."

- "Take your time. Treat each client like they are your best, even if they are your worst in terms of the amount of business they are doing."

- "Don't put pressure on the customer to decide quickly."

- "A more upbeat personality goes a long way."

- "Always listen to what your customer is really saying."

- "When you hire subcontractors, you should be accountable to the work that they do. It is your job to ensure that what the customer paid for is completed."

- "Keep business and home separate."

- "Focus on your client more, your staff less."

- "No shortcuts, do it exactly as you would your own home."

- "Explain things so I can really understand."

Deliver a better experience with excellent service

The term "customer experience" has become a popular term as businesses of all sizes start to recognize the importance of delivering an experience that goes above and beyond client expectations. But what is it exactly? Before we share the different things you can do to ensure a better client experience, let's go over some of the basics.

What is customer experience?

In a nutshell, customer experience is the complete journey of a client's interactions with your business. This starts from the moment the client discovers your business and continues throughout all the touch points the client has with your business, and is ongoing

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including after a client starts using your product or service and continues throughout the customer lifecycle. It focuses on truly understanding the emotional, physical, and psychological connections clients have with a brand or business.

How is it different from customer service?

Customer service is service or assistance a business gives its clients to use a product or service. The goal is to resolve any problems a client may have with your product or service. The difference is customer service is a reactive approach to keeping clients satisfied while customer experience is a proactive approach that strives to deliver an experience that meets the expectations and needs of the client to easily solve their problems.

Why is it important?

As we all know, businesses can't survive without their clients. They are the lifeline of every business. As a small business owner, you also know how important it is to win new business, and more importantly, keep existing clients happy and loyal so they willingly refer friends and family to your business.

Customer experience is a big deal. In fact, a [Bloomberg Businessweek survey](#) found that delivering an excellent customer experience has become a top strategic objective for businesses. Seventy-five percent of customer experience management leaders rated it a five on a scale of 1–5, with five being the highest. And according to a [Gartner survey](#), 89 percent of businesses expect to compete primarily on the basis of customer experience.

5 things you can do to ensure you're meeting the needs of your clients

1. Understand your clients

First things first. Make sure you truly understand your client needs and wants so you can empathize with their problems and provide the right solution. To do this, you need to determine your ideal client.

There are two important types of information you'll collect about your ideal client. Demographics, the quantifiable characteristics that describe who your ideal client is, and psychographics, the psychological information that tells you why your ideal client behaves the way they do.

Demographics include typical characteristics such as:

- Age

- Race

- Ethnicity

- Gender

- Annual income

- Education level

- Marital status

- Employment status

On their own, demographics only give you part of the information you need. To truly understand your ideal client, and the why that motivates them to make a purchase, you need to add in psychographics. This will help you understand the why that motivates them and drives their purchase decisions.

Psychographic information about your ideal client will tell you about their:

- Activities (work, hobbies, etc.)

- Interests (food, sports, etc.)

- Opinions (politics, culture, etc.)

2. Incorporate personalization throughout the experience

A personalized approach to serving clients adds value and is an effective way of building strong relationships with leads and clients. Client management software stores and organizes client information in one place so you can personalize the experience along every

touchpoint throughout the customer journey. Store necessary like their name, contact information, birthday, interests, pet's name, pretty much any detail you need to have on hand to connect with your client.

3. Go above and beyond standard procedures

Standard procedures are fine, but they merely get the job done without the perks or pizazz that will keep clients coming back for more.

Find ways to delight clients throughout the customer journey.

- Make appointment scheduling easy by offering convenient online scheduling that saves everyone from the back-and-forth hassles just to find a time that works.

- When meeting with clients in their home, take your shoes off or wear shoe covers to show your clients you care and respect their environment.

- If clients come to your place of business, make sure the environment is comfortable and inviting. Freshly brewed coffee or tea is always a nice touch.

- Don't keep them waiting. Stay connected with leads and clients throughout the journey by following up frequently, and respond to questions quickly.

- Share useful information with them, like an ebook, blog, or FAQ you've written. Not only will this show your expertise and help you earn their trust, but it can answer questions they may have before they even ask them.

- Make it easy for them to pay you. More and more people are moving away from cash, checkbooks, and even wallets. They prefer using credit cards, debit cards, digital wallets, and mobile payments.

- Reward them with incentives or discounts for being loyal clients or when they refer friends or family.

These are just a few ideas, but the possibilities are endless. Get creative and find ways to wow your clients so they're more willing to return and become loyal, referring clients.

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4. Think of the client experience as an asset instead of an expense

Putting in the time and expense to build relationships and deliver a better experience can be challenging. It's difficult to not think about the costs you incur on your end when you have a client who can't make up their mind or changes their mind—after you've started the work, and it ends up costing you money out of your pocket because you want the client to be happy. However, viewing the experience and relationship-building as an expense, rather than an asset will only hurt your business.

Small businesses rely on loyal client referrals and word-of-mouth to survive and thrive. Fortunately, with the help of software like Keap, building client relationships can be done in less time, which will save you both time and money, because the functionality built into the software makes it possible.

5. Capture client feedback and act on it

Client surveys are an essential tool for helping you ensure you're delivering excellent service and gauging how your clients are feeling. Plus, it shows your clients you care, and you're making an effort to earn their business by addressing their needs and providing them with the level of service they expect.

Conducting a survey is easy. The majority of surveys are now conducted online. You can choose from a number of affordable, easy-to-use online survey tools—such as SurveyMonkey, Typeform, or Google Forms—to set up and administer your survey.

After you've completed a survey and reviewed the feedback, take action and make the necessary business adjustments to improve or make it more convenient for clients to solve their problems with your product or service.

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Tip: Net Promoter Score (NPS) is a metric for measuring customer satisfaction. It calculates how likely a client is to recommend a business to friends or family. Make sure your survey asks, "Based on your experience with (Business), how likely are you to recommend us to your friends or family?" with a zero to ten scale with ten being most likely to recommend your business.

Addressing customer service issues when they arise

Even with a plan in place, there will always be an unhappy client that surfaces now and then. And when they do arise, businesses need to be ready to respond and resolve them quickly. When a client is unhappy these days, the first place they'll turn is Yelp, Twitter, and Facebook to tell everyone about their bad experience.

When you're dealing with an upset client, use these six skills to resolve the problem and turn things around quickly.

6 important customer service skills

Skill 1: Patience

When a client is upset, it's vital you keep your cool and listen to what the client has to say because at that moment, what your client wants is to be heard.

Skill 2: Respect

Excellent customer service requires respect. Show your clients respect at all times, even if they're not respectful. Simple ways to show respect are, saying their name, active listening, and waiting until they're finished speaking before responding.

Skill 3: Adaptability

Be flexible and adapt to each situation. Each client is different. Adapting to each situation gives you the power to control the

situation without taking the power away from the client so they still feel like they're understood and receiving the service they deserve.

Skill 4: Clear communication

Clients come to you seeking answers. Make sure you're speaking to them in words and phrases they clearly understand. Avoid using jargon or industry-specific terms whenever possible and keep explanations simple. Keep in mind your client may not always fully understand the way you talk about something related to your business the way you understand it.

Skill 5: Take ownership

If a client has a question or problem that you don't have the answer to, take ownership of the situation. Get the answer and follow-up with your clients as soon as you have the answer.

Skill 6: Sense of humor

When the situation gets tense, sometimes a little humor can remedy the situation. Of course you'll only want to use humor when it's appropriate and will lighten up the situation.

5 customer service mistakes to avoid

Mistake 1: Not being organized

When a client complains, it's important to take notes and keep track of the issue, especially if it requires following up. Tools like a [customer relationship management (CRM)](#) are handy for keeping notes and setting automatic follow-up reminders. Trying to keep track of things in your head, on sticky notes, or in different apps is messy and difficult to track. Important information can easily be forgotten, like following up with the client or recalling details about the issue.

Mistake 2: You're hard to get a hold of

If a client can't get a hold of you by phone or email, or after they've left a comment on your website or Facebook page, their frustration builds up, and it only makes the situation worse. If they don't get a quick response, they'll move on without hesitation.

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Being accessible and responsive is critical. Simple things like an automatic email response when you're not available can help keep an upset client's frustrations at bay—but make sure you get back to them as quickly as you can.

Mistake 3: Talking too much

Listening is critical. Let the customer talk and be heard. Remember, it's all about the client.

Mistake 4: Not taking immediate ownership

By taking ownership of the mistake, you can diffuse a frustrated client. It removes the tension from the conversation and makes it easier to reach a solution.

Mistake 5: Not using this as an opportunity to build a relationship

When a client reaches out with questions or a complaint, it's a good opportunity to use that time to build a relationship. Be kind and empathize with your client. Take your time to resolve the issue or answer their questions. Think of it as an opportunity to build customer loyalty.

Customer loyalty

Customer loyalty can be one of the biggest challenges small businesses face. More than half, [61 percent](#), of retailers say customer retention is their biggest obstacle. On the other hand, [68 percent](#) of consumers leave a business, because they're upset with the treatment they received.

Why is it so tough? Well, clients are more informed and pickier than ever. They won't settle for second-rate product and services, even if it means going to another business. That's why customer loyalty is so important. Interestingly, an increase of just five percent in [customer loyalty can increase the average profit per customer by 25%–100%](#).

If you haven't set up a loyalty program, then you're leaving a lot of opportunity on the table because [83 percent](#) of customers say loyalty programs can influence them when they're making a purchase decision.

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Almost any small business can implement a loyalty program. While setting up a loyalty program requires some work, it's well worth it. These programs can help improve brand recognition, increase growth, and improve the customer experience.

Loyalty program ideas for small business

There are many different types of loyalty programs. Choose one that works well for your business. Some of the most popular reward programs are:

Rewards program

Keep regular clients happy by offering them special offers and incentives. Little perks like a discount on their next purchase or service, or even free valuable information you've put together in an ebook or video. When you reward loyal clients, they'll be more likely to use your services again and refer friends and family to your business.

Punch cards

Punch cards have been around for decades and have proven to be highly effective. They're simple to use and people love them. You can use a card, similar to the size of a business card like the example shown here, or go with the increasingly popular mobile approach—a digital punch card. More and more businesses are using mobile punch cards because they work, and they're convenient for businesses and their customers.

Scannable membership cards

Scannable membership cards have also been around for a while and proven to be effective at increasing return customers. Similar to a punch card, but these cards are part of an electronic system. They're loaded with useful client information like a client's email address so you can reach out to them and ask them for their permission, or opt-in, to receiving emails from you so you can share promotions and other information that will entice them to come back. Something to keep in mind, though, is an increasing number of businesses are switching to mobile reward cards so customers no longer have to carry a physical card.

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Mobile app loyalty programs

These days, just about everyone owns a smartphone and uses it to store everything, including loyalty apps for the businesses they frequently visit. According to a study by 3Cinteractive, 64 percent of shoppers in the U.S. make more visits or purchases thanks to mobile loyalty programs.

You can work with a customer loyalty technology provider to help you implement a rewards app that's customized for your business. Most clients prefer using mobile reward apps because they're convenient— no reward or punch cards to carry around, and they can easily log in to see their rewards and how far they are from receiving their next reward.

The strategies and skills we shared can help you build long-lasting client relationships that will result in loyal customers who refer new business to help you grow your business.

Software can help you create the experience

> "This all sounds great, but I don't have time to add more to my busy schedule."

Having started out as a small business ourselves, we completely understand. We realize juggling the day-to-day tasks that come with running a business and delivering a better experience are a lot to take on. But the good news is there's help. With the right software in hand, you can avoid customer service problems and create experiences that go above and beyond expectations and turn your leads into satisfied, loyal clients.

Smart client management software like Keap, which is designed specifically for small business, uses automation so you can work smarter, not harder. It automatically organizes day-to-day tasks so busy business owners have the time to provide clients with above-and-beyond experiences that will turn leads into loyal, referring

clients. And the best part is you don't have to be tech-savvy to use automation and discover the benefits it has to offer.

How automation can enhance the customer experience

For starters, automation allows you to treat clients as you would if you did have more time. Top-performing businesses—big and small—are using automation to create better customer experiences, get ahead, and maximize their performance to efficiently serve their clients.

It makes it keeping track of client information easy

Using client management software to capture and organize lead and client information and schedule appointments is a lot easier than managing it and keeping track of it in your head, in a spreadsheet, or on sticky notes. Once a lead or client is entered—either automatically after they fill out a webform on your website, or after you meet them at an event and enter their information, you'll no longer worry about where it is or keeping track of it. The relief of that alone will decrease stress saving you time to focus on what matters most—leads and clients.

It sends the right information to the right person at the right time

The last thing a lead or client wants is to feel like you don't understand their needs and wants. Not only will that hurt your business' reputation, but it will quickly send them running into your competition's hands. Remember, expectations are high. People expect you to know what they want and what they don't want.

Leads and clients are organized within the CRM (customer relationship management) and classified based on their demographic and psychographic information—behaviors, characteristics, preferences, etc. When targeted, automated emails are sent to leads and clients, it enhances the customer experience because they're getting information they care about and want to receive.

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It automatically stays in touch with leads and clients throughout the customer journey

A CRM with built-in smart automation, like Keap, will automatically follow up with leads and clients every step of the way throughout the customer journey—from lead to satisfied, loyal client. It's a tool you can use to provide a better customer experience every step of the way so your leads and clients won't feel like you've forgotten about them or you're not responding fast enough.

Here's an example of an automated follow-up email series with someone who just signed up for more information on your website and checked the box on the webform giving you permission to email them offers and information:

Email 1: Make a great first impression by sending a welcome email.

Email 2: On day two, another email is sent with a valuable message and a request to set up an appointment.

Email 3: After the lead sets up their first appointment, an email is sent confirming the appointment.

Email 4: Shortly after meeting with the lead, a follow-up email is sent with information you quickly enter about the meeting, along with a quote, based on the services you discussed.

Email 5: One day later, if the lead hasn't responded, a reminder email is sent asking them to review the quote and get back to you.

Email 6: After the lead accepts the quote, an email is sent confirming their acceptance along with details you include on next steps.

This example shows a portion of what the experience would look like. You can set up automation so it automatically keeps you in touch with a person from the moment they start to engage with your business and continues throughout the relationship they develop with your business.

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It helps you close more business

When you have a lead who's interested in your business, smart automation can step in and help you "seal the deal." From organizing their information, scheduling the first appointment, to accepting payment (and every step in between and after), automation simplifies the day-to-day tasks so you can efficiently serve your clients and deliver the personalized service they're expecting.

The payoff is in the loyalty

Customer experience is about truly understanding your clients and creating a plan for delivering a better experience.

Get started by reaching out to your top 20 percent of clients who are loyal to your business and ask them how they're doing and if you're doing everything you can to help them solve the problem your product or service solves. Take their feedback and use it as an opportunity to revitalize your business.

Next, take a look at your day-to-day workflows and see where you can simplify and incorporate automation into your business to free up your time to develop relationships with leads and clients. It'll pay off in the end when your clients are raving to friends and family about your business and you're noticing positive results in your business reputation and sales.

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About the author

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Besma Bihnam is the senior content creator at Keap and has a passion for writing effective educational content for a wide variety of audiences. Besma started her business writing career with Arizona Federal Credit Union. She transitioned to writing for the software industry for a few years and then shifted to the financial sector where she wrote content for some of PayPal's most critical services. Besma joined Keap in July 2018 and has written both in-product and marketing content. When she's not writing, Besma spends time with her music-loving family and enjoys listening to her husband or kids play guitar, saxophone, cello, and drums just about every day of the week.

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