The Definitive Guide to Client Management

How to turn one-time customers into loyal clients

Clientbook

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Clientbook

Introduction

As a retailer, you likely understand that there are [two types of shoppers](#) in this world: Casual customers and loyal clients.

Customers show up to your store, make a one-time purchase, and may never return to your store again. A client, on the other hand, is someone your sales associates have a personal relationship with because they interact with them often.

Rather than coming in and making casual, one-time purchases, clients come back to your store often, usually for high-end purchases —this is especially true in industries like jewelry, fashion, furniture, and music.

So how do you turn your customers into clients? Creating a personalized experience for your buyers is what will convert casual shoppers into loyal clients. Whether you're looking to build your clientele at a physical store, have an online shopping experience you'd love to drive repeat visitors to, or a little of both, clienteling is your answer.

Clienteling is a proven way to build customer loyalty, increase sales, and offer a personalized shopping experience for each of your clients.

In this guide, we'll go over everything you need to know about clienteling, its benefits, and how to make it happen at your retail store.

More of a visual learner?

Watch our webinar to see what clienteling is all about

Watch Our Webinar

What is clienteling?

[Clienteling,](#) or retail clienteling, is a technique used by retail sales associates to build long-term relationships with key customers.

Also known as relationship selling, clienteling involves sales teams keeping track of who comes into the store, noting customer preferences, and then making personalized offers and recommendations to build a personal customer experience.

Increased sales

Increasing customer retention rates by

5%

increases profits by

25%

Builds customer loyalty

80%

of consumers are more likely to do business with a company that offers personalized experiences

Sets you apart from your competition

Trusted companies outperform their peers by up to

400%

in terms of total market value

Sources: [Bain & Company,](#) [Epsilon,](#) [Harvard Business Review](#)

What is clienteling software?

Good retail sales associates keep track of their customers, but usually the process is manual. They'll record customer insights in notebooks, keep track of product preferences on sticky notes, or set up reminders on their phones to reach out after a few weeks to build their relationships with customers.

While these are all good practices, they're time consuming and leave room for error. [Clienteling software](#) automates these practices and houses all of your customer information in one place so it's easy for your associates to clientele.

Virtual clienteling tools—like Clientbook—allow you to create trackable client profiles, record important dates, keep track of clients' past purchases, set up automated reminders to follow up with your clients, and even allow your clients to make transactions via text.

Ready to see Clientbook's software in action?

Book a personalized demo today!

Book a Demo

Challenges to clienteling
and how Clientbook can help you overcome them

Clienteling is often something that most retailers know they should do, but often <u>fall short</u> on in reality. Retail sales associates will give a myriad of reasons why they don't have the time or ability to actively clientele.

Below are some of the most common reasons we hear and how clienteling software can help you overcome them.

Challenge #1 - It's unfamiliar

One of the biggest reasons clienteling doesn't stick with some sales associates is because they simply don't know how. They've never been taught what clienteling is and what is involved.

Oftentime this isn't their fault, but rather the store manager or sales manager who has neglected training sales associates on this critical way to build relationships with customers.

Solution

If sales associates are to do well, it's their leader's job to give them every tool and training they need to be successful. By giving them access to clienteling technology, it simplifies the process of clienteling and expedites the learning process.

Clientbook's software is meant to be user-friendly and easy to pick up, so everyone from beginner sales associates to seasoned pros can implement it into their sales process in no time.

"With Clientbook, getting the customer information we want is so easy because it feels like a natural step to providing good customer service."

—Jeff Corrigan, VP of Wilson Diamonds

Challenge #2 - It's time consuming

Most sales teams think they have to use notebooks or spreadsheets to keep track of each individual customer, which is tedious, time consuming, and honestly not worth the effort.

It's difficult to manage consistent customer communications when there isn't a good system in place to make clienteling easy.

When it's busy on the floor, the phone is ringing, and your team is struggling to keep up, they don't have time to worry about personalized service and keeping track of every single customer's name and birthday.

And who can blame them? Why would you do anything manually when there's a better way?

Solution

With clienteling software, your team can overcome the traditional challenges that spreadsheets and notebooks present and instead have instant access to customer data and helpful communication tools.

By utilizing retail technology, sales associates have access to real-time data on all of their clients, all in one place. With features like search, filters, and tags, your team can easily sort and categorize their clients to find the one they're looking for with ease.

What's more, with automated reminders, sales reps will never forget to follow up with a client again. By searching through a client's shopping history, associates can even make personalized offers based on what they know their client would like best.

"We used to run weekly and monthly reports for follow-ups. Sometimes they got done, sometimes they didn't. Our communication has improved drastically with Clientbook. We have already seen a huge change in sales based on follow up."

—Jessica Sagartz, Sales Associate at Clarkson Jewelers

Challenge #3 -
It's not being made a priority

Finally, a lot of sales associates aren't clienteling because store owners aren't making it a priority. This is largely because they don't fully understand the impact it can have on sales, client retention, and overall brand loyalty. All they see is extra work that takes time away from their team on the sales floor.

So when owners are telling their associates to focus on simply closing a deal and making a sale, they won't have any reason to prioritize developing a relationship with a shopper that goes beyond a single day.

Solution

When store owners embrace clienteling technology, sales associates can easily clientele without sacrificing a significant portion of their time or even leaving the sales floor.

With an app like Clientbook, sales associates can easily enter a client's contact information, important dates, and product preferences right from their phone or tablet while they're still with the client.

That way, when they're ready to reach out again, they'll have all the information they need to encourage their client to come and shop again.

"Clientbook has proven to be a great tool to get clients back in the store. We have seen an increase in every salesperson's client base and sales."

—Caroline Carney, Manager at Hemline

Challenges to clienteling
and how Clientbook can help you overcome them

If you're still not sure how clienteling software compares to manual clienteling, this comparison chart highlights the key differences.

Task	Manual clienteling	Clienteling software
Creating client profiles	✖ Information about each client is kept in various notebooks, spreadsheets, and sticky notes ✖ Finding the information you need is time consuming and labor intensive	✔ Information about each client is all housed in one place ✔ Finding the information you need is quick and easy with simple search, filtering, and tagging features
Tracking important dates	✖ Dates are manually entered onto a physical calendar or an individual's digital calendar and may be forgotten by sales associates	✔ Dates are tracked in a client's profile and sales associates get scheduled notifications so they never forget a date
Following up with clients	✖ Follow up communications are only sent if and when a sales associate remembers	✔ Follow up communications are sent consistently and at the right time thanks to automated reminders
Integrations	✖ None	✔ Integrations available

Conclusion

Clienteling is about trust. When sales associates spend less time trying to stay organized and more time with the client, it means casual shoppers are more likely to become loyal clients who keep coming back for more.

Clienteling software gives your team instant access to the important dates and events in a client's life, including their past product history, wish lists, and product interests. What's more, it helps your team know when to follow up and what to follow up on, creating a personalized customer experience—the key to client retention and loyalty.

Ready to see how Clientbookcan start help you team start clienteling?

Book a personalized demo today!

Book a Demo

About Clientbook

Clientbook is a platform and mobile app that facilitates easy clienteling by retail sales associates. By using Clientbook, retailers gain visibility and control over the customer experience, resulting in more store visits, better sales conversion rates, and higher sales. Clientbook also drives relationship building by keeping track of the details in a client's life so that the sales associate can focus on the relationship and give the guidance clients want. To learn more, visit clientbook.com.