

Managing Your Customers

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3/5/2010

- **Customer Management Software**
 - Microsoft Outlook Calendar
 - Microsoft “Streets & Trips” has a map with little pins to show locations
 - Various types of jobs can be color-coded
 - Form fields are in “customizable files”
 - Go to “developer” and click “yes”
 - Create your form fields
 - These are good for mail merging and emails
 - In Microsoft Office 2007 you can save files & invoices to PDF
 - PowerPoint
 - Drawings, forms, photos
 - QuickBooks
 - QuickBooks Customer Manager
 - Outlook can be synched with QuickBooks
 - Click on names, and then click on the contact you want to pull up
 - Projects can be tracked, appointments can be scheduled, etc
 - Invoices
 - Appearance of invoice can be customized
 - Other software programs
 - Why pay money for a program that does basically the same thing that Office and QuickBooks already have?
 - The new off-site customer management program that charges a monthly maintenance fee is even more expensive and has glitches.
 - There are several customer management software programs that are very good, but all the data has to be hand-entered.
- **Customer Hand-Outs**
 - Information sheet/brochure of FAQ
 - Future service scheduling
- **Customization**
 - The default on Office 2007 does not have cut & paste
 - Click on the little arrow on the menu bar and add “cut & paste”
 - Where “tasks” are normally shown, this item can be otherwise applied
 - Run multiple calendars, like business, family, social, projects, errands
 - Carry your laptop with you. When they want to schedule again for six months later, copy that into your calendar.
 - Call a week before the future appointment to remind the customer.
 - If they forgot, reschedule for the next week. Otherwise, you have some extra free time.
 - Lay out your daily route in a loop
 - Punch in their zip codes

- Click on the arrow and look at the map
 - For distance tunings, charge more.
- **Back up**
 - Back-up your data on two or three different kinds of media
 - Tape drive
 - Another computer
 - Paper copy – schedule book/calendar/notebook
 - Carbonite
 - Discs
 - Off-location back-up service
 - Why back up?
 - What if your house or shop burned down and all records were stored in the same place?
 - Laptops & devices last only so long and can be broken
- **Advertising**
 - Home shows & street fairs
 - Display an action model and bench, or an actual piano
 - Book appointments on your laptop right there at the fair
 - Hand out cards
 - Mailing reminder cards
 - Expensive
 - Most people throw them out
 - Some people save them and call later
 - Telephone & email
 - Call between 5 and 7pm
- **Rates**
 - “If you want to improve your business, raise your prices.”
 - Double your price and business might drop only a fraction, and then will pick up. It might even increase right away.
 - In this economy, price raises have to be small, like by \$10. Most people don’t care about a \$10 difference.
 - Keep rates constant.
 - Reasons for raising rates
 - Gas
 - Insurance
 - Tax rates
 - In California, there is a charge for having a sign on the vehicle
 - Have the ability to take credit cards.