



A Customer Conversion, Retention and Growth Checklist

What you can do to convert more people into customers

- What can you customize for the customer?**
Your first communication with the customer sets the tone of the relationship going forward. Wow them by treating them not as just another buyer passing through your funnel but as a person. How can you show them that they are a special individual you would like to continue helping?
- Are you asking them to take the next step?**
That first interaction is wasted if all it is is a shoutout. Instruct your customer to do something by which they can benefit from your product or service. This will get the relationship rolling in the right direction.
- What are you giving the customer?**
When you give someone something, they'll be inclined to give you something back. And when you give something wonderful, you can usually hope for something wonderful in return. So give love, give meaningful interaction, and your prospects are more likely to reward you with their business.

How to retain the customer

- Remain personal.
- Deepen the relationship with multiple touchpoints, at least 7. It could be email, a phone call, a video, a tweet - whatever it is, hit them multiple times.
- Put in a system that lets you check in with the customer now and then for their entire lifetime that they spend with you.
- Update your customer - we commend [OTR](#).
- Encourage customers to reply to your email so you can interact with them.
- Have impact with physical mail. Handwritten notes and lumpy mail make an impression because few people send them. Be among that few, for example when onboarding or acknowledging milestones in your customer's stay with you.



Growing your customers

- Make multiple offers.**
If you are in regular contact with your customers, it will be a natural thing to bring up your other products.
- Get your branding right.**
When people buy more and more into your brand, they will trust you to solve their problems with your products.
- Get to know your customers on a deep, personal level.**
Meet up with them if you can. A close relationship is where they'll be open about their challenges and even provide ideas for your next service, software or course.
- Let your customers become advocates.**
When you've taken time to delight your customer above and beyond the value of your product, you needn't be shy about engaging their help recommending you and your product to others.

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