

# 100

PROVEN WAYS TO

# ACQUIRE AND KEEP CLIENTS FOR LIFE

The Path to Permanent Business Success

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TWO-TIME INTERNATIONAL BESTSELLING AUTHOR

FOREWORD BY  
BOB BURG

## TABLE OF CONTENTS

Foreword by Bob Burg, author of The Go-Giver !

Introduction

Chapter 1. What Clients Want and Why You Get Fired Without It

Chapter 2. How to Personalize Communications and Show Clients and Prospects You Care

Chapter 3. How to Make Clients and Prospects Feel Secure Emotionally

Chapter 4. How to Make Clients and Prospects Feel Secure Economically

Chapter 5. How to Know Your Clients and Prospects Better and Build a Rock-Solid Relationship

Chapter 6. How to Keep Clients and Prospects Engaged by Creating New and Memorable Experiences

Chapter 7. How to Be Sure Clients Always Know You Value Them and Their Relationship With You

Chapter 8. How to Implement These Tactics To Acquire Clients and Keep Them For Life

Afterword by Milton Pedraza, CEO, Luxury Institute, LLC

### [Feedback from your colleagues who read several chapters for editorial review](#)

**From Harry Hoopis, Hoopis Performance Network,** *“If you are interested in Rock Solid Relationships, this book is a must read!!”*

**From “Tom Hegna, Retirement Expert,** *“The proven actionable tactics he shares in this book can set your entire career on a new trajectory and will bring you permanent business success.”*

**From Joe Jordan, author of the book "Living a Life of Significance",** *“I have been in financial services for 50 years and if I were you, I would get this book and read it !!!”*

**From Bob Burg, Coauthor of the International Bestseller, The Go-Giver,** *“Read this magnificent book...and buckle your seatbelt, dear reader. You are about to take a very abundant ride.”*

# Chapter 1

## What Clients and Prospects Want and Why You Get Fired Without It

Most professionals and their companies are focused on and love the products or services they sell and service. That is understandable. Enjoying and having passion for what you create, sell, or provide is critical for success in any business today.

However, while you may love your *products and services*, the client is focused on, and cherishes, the *experiences* they have with you and your company.

Unfortunately, most professionals and companies do not realize the significance of the client (or prospect) experience, nor the need to consistently elevate it over their products and services.

A person's experience with you, your team, and your company affects their perception of your value and ultimately their loyalty to you.

Make no mistake, the elevated experience consumers seek now is far more than just delivering good service. Good service is a minimum expectation of all consumers today. If good service is good enough to retain a client, then why are people changing companies and professionals?

As an example, in Engati Digital's recent survey of 100 top advisors (known for giving great service) in the financial industry, 81% said client retention was now more important to them than client acquisition post-pandemic. They know that good or great service alone will not keep business on the books.

With very few exceptions, people have multiple choices when looking for a company or sales professional. While the purchase of a product or service is often perceived and functions as a “transaction,” it is the experience that people have around that purchase, and thereafter, that captures their ongoing spending and their loyalty.

Dozens of studies have been conducted by organizations such as U.S. Luxury Institute, PwC Research, Reuters, Pew Research, and Zendesk that clearly illustrate that people today are far more loyal to the experience they have and the resulting sense of relationship than they are to a product or a brand.

In just one example of many, in a recent study conducted by PwC Research’s Professional Services Group, 80% of respondents indicated that both real *and* perceived value is largely based upon their experience with the professional and by extension the company. It is an integral part of their received value equation.

You inherently know this based on your own purchase and loyalty behavior.

For example, you might stop going to a noisy restaurant despite the great food and service. If you stop and think about this, you will quickly realize that even when a brand is great in every expected way, one bad experience—like dining in a restaurant that is too noisy to have a conversation—can outweigh all the positives. So, given that value today is not just about product, pricing, and service but also the overall experience, you would probably decide to go somewhere else for dinner.

As another example, think of a financial professional you have engaged. Even if their expertise is clear, their attitude, or their condescending tone, or their lack of personalization could easily lead you to question, *Am I in the right place with the right professional?*

Or consider the repair technician who didn’t show up at the appointed time, then didn’t have the parts needed to do the repair and said you would have to call the shop to get rescheduled.

Or the call you made to an online retailer to get an issue resolved or a question answered, only to get the run around.

You don’t need me to list more unpleasant experience examples—we all have had them and continue to have them, and as result those professionals and their companies have lost our business.

In the introduction, I wrote about how “satisfied” individuals are loyalty neutral. You prove this repeatedly when you capture new business by moving a client from their current professional and firm to your business.

People today are not just buying the product or service you are selling. People are buying the experience they have with you and the relationship and emotional bond that it fosters.

Client experiences also affect the perception and decisions of others more than you know. Client socializing and social media have become the true centers *for* influence, not just *of* influence.

In this digital social media world, Zendesk studies have shown that up to 87% of clients share good *and* bad experiences with others. Like it or not, shared experiences of every kind become linked to you and your “brand.”

Regardless of whether your business is large or small, when clients do business with and work with you, your name is on the experience they have, and you own it.

And like it or not, every single client and prospective client will have an experience with you, and you get the privilege of deciding what that experience will be.

People have so many choices that the crucial cornerstone of a sustainable, growing, and profitable business is unquestionably the elevation of every client’s and prospect’s experience. And to make this even more of a burning platform issue that must be addressed, some clients will leave a brand, a professional, or a firm after just a single bad experience!

When you consistently elevate the client’s experience, you will build a strong relationship with them, and those relationships will drive ongoing revenue.

Furthermore, the buying population has moved well beyond the often-used phraseology of corporate speak around this topic.

Phrases such as “*client-centric*” and “*customer-focused*” enjoy widespread use. However, they are typically addressed and demonstrated by efforts to “*smooth out*” the so-called “*client’s/customer’s journey*” by using technology, improving responsiveness, and other strategies.

I suggest a reset of this thinking and lexicon. Thinking of the customer or client as being on a journey may imply that journey has an ending. God, forbid it has an ending, given the lifetime value of a client relationship! It is alarming how few people in business understand, or perhaps more accurately realize or calculate, the lifetime value of a client and how critical their retention is.

# What Experience Do People Want and How Do THEY Define It?

People seek an experience with you that is far more personalized and humanized than smoothing out transaction rough spots or giving responsive service. While those things are important, what is most important in this ultra-competitive environment is very clear if you ask them.

Through our consulting work in many industries interviewing clients and customers of widely diverse companies, what people want and how they define an elevated experience has been consistent.

At the core, people today want a level of personal engagement that is not happenstance or just some magical fairy dusting of special offers made by marketing. While loyalty programs and preferred pricing and offers have proven to be useful, what people seek now is far more and deeper than that.

They seek a relationship with you and your company.

They want to feel they are part of your community—a community that you respect and appreciate.

What they seek is an experience that is: *consistently thoughtful, kind, empathetic, and caring, with interactions and moments that create invaluable lasting impressions.*

Large companies balk at this and say, “Well, front line workers can’t be expected to gather information and demonstrate that for customers or clients, as that slows down the service and transaction process.”

Others who do much of their business online say that personal engagement and being thoughtful, kind, empathetic, and caring is difficult if not impossible, even with AI and upgraded chat. Yet Amazon and even Walmart and Target have demonstrated that online interactions can still be personalized and elevated.

And it is not just large companies and online providers that balk—individuals and small firms do as well. They, too, are so focused on their products, processes, platforms, plans, and positioning that they do not realize they need to be focused on the one thing that will sustain and grow any and every business: treating prospects, clients, and customers as individual *people*.

Their merchandising mindset is exactly the problem and the reason they can’t see the way forward. Even when companies and professionals see themselves as relational, this focus equates to a transaction mindset. This merchandising mindset and lack of awareness eventually lead to the loss of clients and potential ongoing revenues.

Unfortunately, some merchandisers will refuse to change. They will continue to believe their product or service will keep them in transactions and clients. However, they will learn from their own painful experience why the client is the *final* arbiter of loyalty.

When some of their best clients have left, revenue slumps, and they're in business repair or resuscitation mode they will then have the time to reconsider and finally focus on their remaining clients as "people."

Make no mistake, Chewy thrives, as does Amazon, Airbnb, The Ritz-Carlton, Freddy's Frozen Custard and Steakburgers, Chick-fil-A, Wynn Resorts, and many, many others, because their professionals take a personal interest in knowing how to elevate their clients' experience. They are laser-focused on developing a relationship with clients and a client experience that develops true advocacy for their brand which results in even more business.

As Jeff Bezos reportedly said, *"We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better."*

As far back as 1999, this was his focus. When asked, *"Are you a pure internet play?"* he replied, *"Internet smernet what matters is we are solely focused on the customer experience."*

His answer was very telling and serves as a signpost for all of us. While Bezos is not the final arbiter of the customer experience, his answer was part of the beginning of what is unmistakably the experience revolution.

Others have noted the importance of elevating the client experience and the resultant loyal relationship. They offer similar insights.

For example, in a 2018 interview with *Vanity Fair*, Mark Cuban brilliantly said, *"One of the most underrated skills in business right now is being nice."*

Sibel Terhaar, author and critically acclaimed Kindness Activist, said, *"Kindness is more valuable than your job title. People won't remember your job title, but they will remember your kindness."*

Best-selling author Steven Covey said, *"When you show deep empathy toward others, their defensive energy goes down, and positive energy replaces it. That's when you can get more creative in solving problems."*

Regardless of what you are currently doing or how you perceive the strength of your prospect and client relationships, be mindful that consumer expectations are continually evolving.

## **Value today is solely defined by the consumer and based upon every touchpoint they have with you, your team, and your company.**

When you continually elevate their experience through your actions, the results are nothing short of remarkable.

As a research-based consulting firm, we have been blessed to capture the input both before and after an elevated experience becomes THE strategy for client retention and growth.

People have said that their professional's consistent ongoing interactions that demonstrate thoughtfulness, kindness, empathy, and caring motivate them to be grateful, delighted advocates for the professional and their offerings. WOW!

Specifically, those we interviewed across many industries said about their professional:

1. **They feel a deeper emotional connection with you.** They feel that no matter what, they can count on you for the direction and advice they need in your area of expertise. This finding is solid gold.
2. **They feel their relationship with you is strengthened.** They feel as though they are significant to you and to your company instead of just another buyer of your product or services. Most importantly, they said they feel secure that you will be there for them when needed.
3. **They feel motivated to do more business with you.** They feel comfortable with you because they feel you have taken the time to know them and understand them at a deeper level. As a result, they don't feel *any* desire or need to shop around.
4. **They feel it makes you distinct from others.** They feel that your efforts to relate to them and know them sets you apart from those who are stuck in and reliant on the transactional past.
5. **They will advocate for you and what you do for them.** They feel that many could benefit from working with you because you make them feel valued. *Specifically, they feel people they know in their network should know you and would benefit from you and your work.*

These findings illustrate how you will be able to withstand the competitive pressure from other professionals and firms that attack your client base and even the technology offered by chatbots, AI virtual assistants, and ongoing tech innovation.

### **How is this possible?**

The answer is that by focusing on the experiential, relational side of the business, you will be able to orchestrate your client and prospect interactions in many media.



However, to move forward successfully requires an adjustment. You can no longer think just as a merchandiser—just a plan processor, a product advocate, a process devotee, or a provider. Rather, you must adjust to focusing on and thinking about every current and prospective client as a *person*.

Not a transaction, not a buyer, but a person who, when treated with thoughtfulness, kindness, empathy, and caring, will become an advocate for your brand.

Does this mean everyone will respond to your efforts to elevate their experience and build a relationship with you? No. But then, do you really want to do business with people who don't value those traits?

That said, most people almost desperately want to feel appreciated and connected. However, given their many choices, they are both discerning and quick to judge.

Asking your new clients why they left their previous professional and firm provides actionable insight.

The important question is not “*Why did you join us?*” but rather “*Why did you leave them?*”

Understanding this gives you real insight into their expectations as well as the competitive messaging you can use. Their answers will illustrate the remarkable opportunity you have to win more business by consistently elevating every client relationship and consequently bonding with them emotionally.

Here are a few of the answers our clients have heard when they asked their new client “*Why did you leave the professional or company you were with?*”

- *We didn't feel a sense of connection.*
- *We didn't feel welcome, and they weren't nice.*
- *We didn't have a sense we were anything more than a buyer to them.*
- *We felt like they were just going through the motions and showing us property above our price range.*
- *They always had their agenda with no consideration for what we really needed as a couple.*
- *We got tired of not getting regular updates.*
- *They were so into themselves; they were always talking at me.*
- *They always said how busy they were, and we felt rushed. We finally decided they were too busy for us.*
- *And the worst in my view was: They were rude to my wife.*

Some of you might say that these are just sales training and presentation issues. I disagree. The problem is less about sales training and more about how prospects and even clients are not being graciously treated as people.

However, this book is not about focusing on what you or anyone else is doing wrong. Rather, it is about focusing on what you can do better.

When you solidify your relationships with clients and prospective clients by elevating their experience with you it engages them emotionally, they will know unequivocally they are in the right place with the right professional.

Here is an example sent to me by an audience member after I spoke at a conference he attended. Only the names, occupations, and location are omitted for his and his client's privacy.

*Richard, I loved what you had to say at the summer conference and really started to think about how I could "elevate the client experience to stand apart from the competition."*

*So, I had a meeting with a young professional yesterday morning for whom I recently did a financial plan. She was bringing in her father-in-law to essentially listen in and critique. He's the owner of the firm she works in and the patriarch of the family. I thought I would take some of your advice and elevate this early morning meeting with some fresh-baked pastries on a nice tray and serve them on small plates.*

*I went to Target the night before and bought a full place setting set with silverware. It was \$70+, and this box was HEAVY. I take it home and wash everything for the next day. Then here I am, at 8am, in a full suit, lugging a huge box out to my car. I stop and buy an assortment of fresh French pastries and drive to the office. Now I'm lugging my bag, a box of plates, and a box of pastries across a parking lot. I get in, unpack everything, and set the table. At this point I am sweating and thinking to myself "what am I doing? If this doesn't work, Weylman owes me \$100!"*

*Clients arrive, I greet them and tell them I brought in fresh French pastries. Richard, I kid you not, they both said, "We appreciate you for being so thoughtful," and then dove into those pastries like they had never had any before!*

*I end up signing the father-in-law up for a plan AND he wants to "consolidate" all his investable assets with us! I'm bringing my plate set and fresh pastries to every meeting now. Thanks for the inspiration!*

I was impressed with his commitment to implementation on apparently very short notice.

## Where Do You Go from Here?

Throughout the remaining chapters, I will detail for you the tactics *that people have said* increase their perception that you are thoughtful, kind, empathetic, and caring toward them. These actions will result in you standing apart from the competition and being a valued professional.

They will deliver the 4 “E”s—an Elevated Experience that creates Emotional Engagement and the relationship people seek.

Delivering the 4 “E”s will make it hard for clients to leave you because of their emotional connection and the way they are treated. When you engage with prospects in the same way they will also be drawn to you.

To assist you as you read, consider what you are doing now and what needs to change. What can you and/or your team do to elevate the client and prospect experience and relate more effectively with every individual? Consider also how much more business you will acquire by improving the experience people have.

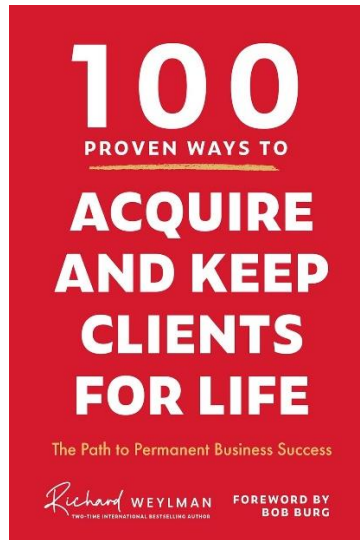
*The experience and relationship they want with you is very clear:*

- They don’t want to be taken for granted.
- They don’t want to be referred to as “an account” or as part of your “client or customer base.”
- They want to be treated as an individual.
- They want to be remembered.
- They want personalized and humanized communications.
- They want an elevated experience, not just “expected good service.”
- They want to feel significant to you.
- They want an emotional connection.
- They want economic security.
- They want proactive, understandable, meaningful communications.
- They want to build a portfolio of great memories about their experience with you, your team, and your company.

I will address each of these needs and many more in detail with a specific tactic to ensure you are meeting each one. In Chapter 8, I will provide several action steps you can use to implement these tactics into your business.

As you read, be mindful that, after all is said and done:

**Relationships Drive Revenue. Build Them and You Will Thrive.** Or, as my good friend and fellow Hall of Fame speaker Patricia Fripp says so well, *“Don’t celebrate closing a sale, celebrate opening a relationship.”*



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