

Samantha:	00:04	Welcome to Process to Profitability, a podcast all about the tools and strategies you need to serve your clients and grow your small business. Hosted by me, Samantha Mabe of Lemon and the Sea. Join me as I chat with creative entrepreneurs and small business owners about how they built and grew their businesses and how you can do the same in a way that fits you. Let's get started. Hi everyone and welcome to Episode Three of Process to Profitability. Today, it's just me and I am going to be talking about why serving your clients and customers. Is so important. Of course, this is the basis for the entire podcast, but I also want to talk about why I think it's important and how it came to that conclusion in my own business. I will be talking a little bit more about my business background and how Lemon and the Sea got started in another episode, but for what you need to know now, I'm going to give just a little insight into my business so that you can see where all of this focus on serving clients well comes in.
Samantha:	01:13	I started Lemon and the Sea in 2015 after I relocated for my husband's work and wasn't able to find a job and at first I had no idea what I was going to do, but over time I eventually came to offer graphic design services, which then morphed into packages for branding and website design, specifically, which I absolutely love as a way to serve my clients. But what I found so much in the graphic design world and in the online world in general, is that people are just not serving their clients well. There are way too many clients out there who have told me that their graphic designer disappeared on them, that they started a project. Maybe they signed a contract. Maybe they paid them. Maybe they even got started on the project, but then their designer either didn't follow through, didn't give them what they were expecting, and when that designer disappeared, they couldn't get all of the work that had been completed.
Samantha:	02:23	Or if the project was done and the final files were sent, it wasn't up to what the clients were expecting from the conversations that they had had. Now I am totally on board with those of you who are probably thinking that clients might have really high expectations for something like graphic design and don't want to pay what might be the highest and best designer, but I think that as an industry we are falling short in the customer service realm. I'm not really sure why that is. Other than that we are just overwhelmed and overworked, but we can't let customer service slide because of those things. Now, I also used to work in a quite a few different fields. I was a lifeguard for many years. I worked at a restaurant during college bussing tables. My husband was the manager at a local Chick-fil-A, so I'm very

familiar with customer service in sort of those jobs where people are on the front lines.

- Samantha: 03:39 You expect those people to treat you well or not depending on where it is that you're going in the atmosphere that they're providing, but in our own small businesses, we are the ones who decide what our customers think of us and how they perceive us based on what we are offering and how we're treating them. When I started Lemon and the Sea, I was doing everything by hand and it wasn't until much later in my business when I was starting to get a lot of clients and be a little bit overwhelmed by all of the work that had to be done that I looked into automation and I want to tell you this story, not because of the specific tool that I am talking about, but because why I thought the customer service experience was so radical. So I looked long and hard for a client management system that would work for my business and would allow me to really condense the number of tools that I was using both on my side and for my clients to keep things organized and really pulled together.
- Samantha: 04:49 I looked for almost a year. I tried out a lot of different things and some of them just weren't tailored to design the way that I do it and others I felt were missing tools and some were maybe too expensive. So it's not that those tools weren't useful and couldn't be used by you, but I found that they weren't right for me. So when I found Dubsado, which is a client management system, I was really excited. It was a low entry price. They had a lot of the features I was looking for and I could figure out really easily what it was that they were working on. So they had invoicing and contracts. They were going to create a time tracking system and a scheduling system and all of that would allow me to really put all of my work in one place so my clients could just have one login to everything they needed to do and wouldn't have to worry about remembering different addresses and logins to get to different things.
- Samantha: 05:50 But I wasn't sold on it right away. I knew that this was going to be a big investment of time to get all of my projects switched over to this management software and I was fairly happy with the system I had in place. But what sold me on Dubsado was the customer service they provided. So I signed up for their free trial, which is not limited to a number of months, but to a number of clients. And I signed up for a webinar or to just go over the basics of how to set it up. I figured this was going to be like any other webinar. It was going to be somebody who worked at the company, walking me through everything, but when I actually got on, it was the founder of the company

walking me through each and every step. She was accessible, answered questions, and they even had a Facebook group that I then joined that the founders are the ones in there answering questions every day.

Samantha: 06:50 Now, not every business is going to be able to run that way. Of course, if you are serving your clients one on one, you probably aren't going to have a Facebook group for them all to come in and ask questions, but what sold me and what's sold so many other people on this particular product wasn't the tools and features and price point. Those are all great things, but it was the customer experience that we were getting from the very beginning. We felt like we were valued. We felt like we were important to these people and they would take our input seriously.

Samantha: 07:29 So whether you are running a service or a product based business, your clients are the reason that you're in business. They are the ones who see your talent and recognize that they need you to help them. They're also the ones that are going to help your business grow. They're going to give you referrals, reviews, testimonials, they are going to talk about you. We can put as much effort as we want to into running a business, but if we don't have clients there to support us and to hire us and to see our value, then it's never going to grow.

Samantha: 08:06 The reason I bring this up is because so many of us, when we're starting our businesses are afraid to put our services out there. We're not sure what it is that we should be offering or who it is that we should be talking to, and so we sit in this stage of procrastination and I have been there many times, but what you have to do is get out there, find some clients that you think might work for you. Find some people who are totally on board with what it is that you're trying to do and then get out there and serve them. Give them the best you have to offer at the time and then ask them for feedback. Learn from them. Those are going to be the people that support you throughout this business journey. Some of my best clients who started with me very early on and are still working with me because they know that I am going to be efficient. I'm going to communicate with them, I'm going to get them what they need in a timely manner and they don't have to worry about having a designer disappear on them.

Samantha: 09:10 But what this means is that your clients are also the ones that can bring your business down if you aren't delivering what you promise. Now, that may sound a bit scary, but I'm sure that you've seen in Facebook groups, people asking about how you

can remove one star reviews from your Facebook page. I'm not saying that all of those reviews are legitimate. I don't think they are. People out there can be really mean, but if you are not serving your clients well. They're not going to give you a good review. They're not going to share with their friends. If you've ever had a bad experience at a restaurant and a friend asked you about it in the future, you're not just going to pretend like it's OK. You're going to tell them about that experience because that is a person you care about and you don't want them to go through the same thing that you did. So we need to serve our clients well, not just because of referrals and reviews and sharing with other people, but because that's the way we would want to be treated and it's a whole lot of fun to be able to be friends with your clients through the way that you're serving them.

Samantha: 10:23 In my business, my clients are so important and that's why I'm passionate about serving them well; even more than I am passionate about making a big profit. Now, I would love to tell you that I have a six-figure business, but I don't yet and I am becoming OK with that because what I am doing in my business is serving the people that are supporting me really well. I would much rather have my clients come to me at the end of a project and say, thank you so much. You have been so efficient. You communicated so well, and that is why I loved working with you. Then have them pay me big bucks so that I could claim that I have hit some kind of profit mark.

Samantha: 11:12 Now there are companies out there who make a lot of revenue with not so great customer service, but they're usually short term gains, especially online when there are so many service providers to choose from. You know what I mean by this. There are companies out there who have built a huge business and people think that they're never going to fall because there are big and booming, but over time as people see that they are not following through with their customers or that they are having problems behind the scenes. We're going to stop supporting those businesses. There are quite a few that we have seen with this just recently. Sharing client information or siding with customers instead of their service providers. That is a choice that they're making and maybe it makes sense for their business, but it doesn't serve their clients. You and I who are spending our money there well, and so we're going to go and find someone else.

Samantha: 12:17 Now, the good news is that great customer service is going to lead to profitability in your business as long as it isn't the main focus; because what happens when we take our eye off of

serving people well, of creating a great experience of doing our best work and change that mindset, so all we're focused on is making a profit that becomes the basis of what we're doing. We want to make that money so badly that we might cut corners or start treating our employees or our customers badly and I've seen this personally in quite a few businesses that I've worked for or that I know people who were involved in and it's devastating and it might not look that way from the outside. Those clients or those stores might be doing really well. Those businesses might still be growing, but there's a difference to those who experienced it before and those who are experiencing it now.

Samantha: 13:26 I found that there is a problem with serving clients well though, and that's how do I serve my clients well and still set boundaries. Now, I talked about this a little bit in Episode Two with Maggie when we're talking about where you can set up those expectations, but I want to reiterate it here because this can be such a stumbling block, especially if you're like me and you are a people pleaser and you just want everyone to be happy. So what can happen is we are trying so hard to serve our clients well, we want our customers to have the best experience possible, is that we then give up some of the things that we should be holding onto it really tightly. This might be going outside of the office hours that we set or giving them extras that we didn't mean to and while that may look really great to the customer who is hiring us or the person who is buying our product, it hurts us in the end because we have set ourselves up to be drained by our business instead of to be f

Samantha: 14:40 So how do we draw the line between serving well and going above and beyond and creating that magical client experience and being taken advantage of? Let me tell you this, good customer service sets boundaries so that you can do your best work and your client knows what to expect. Boundaries are there so that you can provide the best service possible and when you are going outside of those boundaries and you are tiring yourself out or you're working too hard or you're serving too many people at once, you're not able to give your best work. So you can start by setting these boundaries early and often, continue to reinforce them throughout your time with the client so that you can avoid big issues down the road. If you put everything out there up front about how working with you is going to look, then they are not going to be able to come back to you later and say they didn't understand because you can just refer them back to that information.

Samantha:	15:45	Here's a couple of really important places to set these expectations. First is on your website. Start setting expectations the first time a client is interested in hiring you, this can be a little bit on your services page where you talk about your process, it can be on your contact page, where you're setting office hours and how quickly you reply to emails. It can be on your about page. Maybe you can talk about how you like to take weekends for family. It doesn't have to be so explicit on your website, but make it apart of how you run your business. The next place that you can include these expectations and boundaries is in your contract. This is a great place to include that because this is a legally binding document that your client has to see and sign before they start working with you, and this is also where you can put information about the consequences of what's going to happen if these boundaries are not honored and met.
Samantha:	16:45	Now, that might seem really scary and it might seem harsh to have a contract, but if you don't have one in your business, you really need to get one. We have an episode coming up with lawyer Autumn Witt Boyd, who's going to be talking about how you can create contracts that protect both you and your clients and I think that's going to be a really great episode to show you why contracts are so important and why they're not scary. Now, the last place I like to enforce these boundaries consistently is in my emails and this mostly has to do with contact and office hours. I include that in my email signature, so that in every email I send clients or whoever is reading it is going to know these are my office hours and this is when you can expect to hear back from me on something.
Samantha:	17:34	They might not read it, but as long as it's there, I can refer them back to it in the future. Now, if you're not sure what kind of boundaries you should set, these are a couple of places you can start; first, pick your hours of availability and you want to leave yourself some time on the front end and back end of the hours you're actually going to be in your office working for personal time and catching up on emails, but then tell your clients and anyone who is interested in contacting you which hours you work. So for example, on my website it says my office hours are nine to four, Monday through Friday. I'm usually sitting at my desk during that time, but even if I'm not, I'm consistently checking my emails and I'll get back to people very quickly. You also want to tell people how quickly they can expect a response from you.
Samantha:	18:27	For my website, I do this after someone submits a contact form, I say you could should hear back from me within 48 hours. For

my clients, they know that they can expect to hear back from me from 48 hours to a couple of days depending on what it is that we're working on. You also want to make it clear, with your clients especially, what type of communication you want them to use, so don't give out your cell phone number if you don't want to receive text messages in the middle of the night. Figure out the best type of communication for you and make sure your clients are aware of that and can use it. On my projects, I like to use Asana so I can assign my clients due dates. They can see how things are progressing and they can share comments with me and files and anything else so that we can be in constant communication and nothing gets lost in my inbox. You might want to do every communication through email and that's totally fine. Just make sure you are condensing things into as few places as possible so things don't get lost, and so your clients know the best way to get in contact with you, so that you will reply and can make sure that you are serving them well.

Samantha: 19:43

You may also want to have information if you have a non-refundable deposit, which most of us as service providers do, explain that the deposit is non-refundable and what that means and what happens if a project is cancelled. This is going to hopefully prevent people from coming back to you in the future, having to cancel a project and asking for money because they already know that that isn't something you offer. If you are a designer like me, you will want to include information about the number of revisions that you give and remember that these boundaries are guidelines and they are rules that you've created so you can break them. But for me this means that in my welcome packet, in my contracts, I say you get three revisions for each stage of the project. So you get three revisions on your logo concept before you have to pick a final design. Depending on the client and how we've worked together and how far we have come along. I might change that up a little bit. I might give them a couple of extra revisions, but by having that boundary set in place, I can always stick to it and refer back to it in the future if there are questions.

Samantha: 20:58

If a client isn't going to follow through on something like a deadline or really anything, you want to let them know what the consequences of that are going to be. So if a client misses a deadline, you might want to say this is going to delay your project by so long and there's going to be a late fee because you are pushing back other client projects or maybe you say if you have missed all of these deadlines or you didn't show up to the meetings, I have the right to cancel the project and this is what that looks like.

Samantha:	21:29	But in addition to consequences for your client, you also want to outline consequences for yourself. So what happens if you are the reason that a project is delayed, does the clients still have to be responsible for a late fee? They shouldn't and you want to lay that out saying something like, if the project is delayed for health reasons or anything behind the scenes that's going on, I will do my best to get you in the schedule as early as possible, but if you decide to go with someone else, this is how you can do that and this is what's going to happen.
Samantha:	22:04	You also want to outline how and when you get paid. This is a really big thing in your contract which we are going to be talking about in another episode and a couple of other guests are going to speak about getting paid, but it's a boundary you want to set in place so that your clients know up front that yes, you want to be friends with them and yes, you want to serve them well, but this is a business and they do need to honor that and pay you within the terms of the agreement. You also want to outline the scope of work, so what is it exactly you are doing, what are you giving them, what do they get in the end, and how are you going to work together? That's a great way to set expectations up front so that your clients aren't expecting something from you that you aren't prepared to give them or that you should have, you know, bumped them up to a higher package for.
Samantha:	22:58	Then, you can also include information on how to hire you for additional work. This may depend on your industry and what you're doing, but if you offer retainer packages or ongoing work for previous clients, you can let them know, if our project is over or if things get extended, this is how you can continue to work with me. Doing all of this upfront just makes it really easy for clients to know and be able to reference this information in the future. If they have questions and helps you to avoid having to send some really awkward emails. You're going to add your own boundaries as you work with clients and find the areas where your business really needs to have some solid boundaries, where you can be flexible, what it is that your clients might struggle with.
Samantha:	23:53	The next part of creating a great client experience is being able to focus on one part of what you're doing. Now. The service you're providing should be of a great quality that is going to set your business apart as well, but we cannot do it all, unfortunately. So you might need to pick one thing to focus on that's like an extra for your client. Examples of this might be giving really great client gifts or working hand in hand with your clients. Having one on one phone calls as often as they need or giving really great education after a project is over. Those are all

ways that you can set yourself apart and things that your clients in the future can reference to other people because it wasn't just that you gave them a great logo design or their wedding went fantastically. It's that you went above and beyond in these certain areas and they're going to tell their friends and their family and whoever else about that, and those are things that you can repeat if you're not trying to focus on doing them all at the same time. Now there are areas in your business that everyone needs to be focusing on. This is imperative to being able to grow a business. That's efficiency, communication, knowledge, leading your clients, meeting your commitments. Those are all things that businesses have to be able to do to stay in business. If those aren't ways that you're serving your clients then you really need to evaluate how you can make that part of your business.

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| Samantha: | 25:53 | So as you become known for customer service, people are going to want to share your work with their friends and the bonus here is that if things get tough, if you fall behind on work or you drop the ball on an email that got lost. If you've been providing great customer service along the way and can go in and say, I am so sorry. This is what happened. This is not normal. People are going to know that that's the case and they're going to have a lot of grace for you. |
| Samantha: | 26:24 | So if you are growing your own business and are working on creating a really great client experience, I would encourage you to evaluate your current customer experience and see what areas you might be able to improve and then find ways to automate and create templates so that you can your clients well and give them the best experience possible. Now, a lot of the things we covered in this episode are going to be covered more in depth in either interview shows or more solo episodes that I'm going to be doing in the future, but I thought it was really important to start off talking about why customer service is so important to your business and how you can get started on that path today as we're just starting off the Process to Profitability podcast. I'm so glad you've been joining me as we have been going on this journey and I hope that you will continue to listen every week. I've got some great guests lined up and I am super excited to continue to share with you. |
| Samantha: | 27:26 | Thanks for listening to Process to Profitability. Please take a minute to leave an honest review in iTunes so that I can help more small business owners and creative entrepreneurs. Find the show. |