

# Daily Checklist - Client Advisors

## Know My Numbers

Sales	Day	Week	Month
Actual	\$	\$	\$
Goal	\$	\$	\$
Daily Average Needed	\$	\$	\$

Appointments	Day	Week	Month
Actual			
Goal			

Outreach	Day	Week	Month
Actual			
Goal			

## Know My Clients

<b>Am I setting aside 30 minutes per day to clientele?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
---------------------------------------------------------------------------------------------------------------------

**Pro Tip:** Consistency is the key to success. Make clienteling a daily ritual that always happens, without exception.

**Pro Tip:** Clienteling can take place on the sales floor or a back office. Just be mindful of floor coverage if you must step off the sales floor.

<b>Am I engaging with the clients who show up on my lists?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
-------------------------------------------------------------------------------------------------------------------------

**Pro Tip:** Whether you're new to clienteling or a seasoned pro, the lists on your home screen are a great place to start in order to grow your business.

- ✓ Reach out to unengaged clients
- ✓ Send out birthday messages
- ✓ Browse clients' wishlist and recommend similar products
- ✓ Browse clients' purchase history to recommend products

- ✓ Send follow-up messages to recent purchasers to activate them
- ✓ Reconnect with lapsed clients or top clients from last year

**Am I using small talk to build a rich client profile?**

Yes  No

**Pro Tip:** Asking the right lifestyle questions will help to build a rich client profile. The more you know about your clients, the better you will be able to connect and the more frequently you will be able to engage with them

**Pro Tip:** Relationships are built over time so don't expect to know everything about your client after just one visit. Try to discover at least one new thing about them during each visit and be sure to record it in their profile.

Excellent!	Needs work...
"Where do you like to vacation?" "What do you like to do on weekends?" "Which stores do you like to shop at?" "What ages are your children?" "What kind of pets do you have?"	"How can I help you today?" "What's your budget?" "Are you looking to buy today or do you need to think about it?"

**Am I effectively capturing contact information?**

Yes  No

**Pro Tip:** Remember that the only way you can clientele is if you take the time to ask clients for their contact information. Ask open-ended questions and explain the value to the client by providing you with their contact. Avoid words like "system" and "database." These have negative connotations.

**Pro Tip:** If you work for a store in California, be sure to follow your company's data collection policy to ensure compliance with the *California Song-Beverly Credit Card Act*.

Excellent!	Needs work...
"I'd like to add you to my personal client book so we can stay in touch" "What's a good phone number for me to text you at?" "And a good email address?" "What's your address so that I can send you a thank you card?" "And may I have your birthday so that I can send you a small gift when it's your birthday month?"	"Are you already in our system?" "Do you want to be in our database?" "May I have your contact information?"