



Wowing Clients

From Onboarding to
Offboarding



“Just having satisfied customers isn’t good enough anymore. If you really want a booming business, you have to create raving fans.”

Hi there!

I'm Kawania (kah won nee ah) Wooten, and my hospitality industry experience comes from:



- 34 Years of Conference and Event Planning Experience
- 17 Years of Wedding Planning Experience
- 8 Years as an Adjunct Instructor
- Native of Atlantic City, New Jersey

Why is this so important?



- Your clients will feel heard.
- Your client retention increases.
- You can connect with your clients on a personal level.
- You develop a better understanding of your clients' needs and pain points.

This is
where the
magic
happens.



Onboarding Your Clients

- Make sure your systems and processes are in place.
- Make sure your team is informed and trained.
- Send a warm welcome to your clients immediately.
- Host a kick-off; give homework; and host tutorials.
- Surprise them with a “little bit of love.”
- Schedule milestone celebrations with your clients.



You are the
ALPHA



*“You teach people how
to treat you.”*

Communication Tips

- Onboard your clients with a “kick-off”
- Submit weekly/monthly progress reports
- Send a follow up e-mail to each of your phone
- Follow up when something goes wrong
- Pick up the phone
- Remember to say “Thanks”



Educate Your Clients

- Think of your clients' "most asked" questions
- Quick and easy bullet point instructions
- Provide them with an educational calendar
- Create video tutorials; educational webinars; and one-on-one tutorials



Leading a Discussion

- Avoid scheduling meetings that can be addressed with an email or a call
- Be mindful of the meeting time or the time of day.
- Stay on topic. Save the “chit chat” for the end of the meeting or another time.
- Finish the meeting with a summary of the discussion and next steps.



Setting Boundaries

- Detail your services in the proposal and in the contract
- Put systems and processes in place before you begin
- Have proactive conversations with your team and your client
- Determine and reiterate hours of operation in advance.



Setting Boundaries

- Identify scope creep. Address it immediately
- Limit your desire to “gold plate” services
- Set and reiterate behavior expectations
Follow your own rules
- Say “no” when you need to, and be willing to walk away
- Put a buffer between you and the client



Show them
the Love!



*“Good customer service is
a transaction.*

*Good hospitality is an
experience.”*

Get to Know Your Clients

- What's important to your clients?
- How do they communicate?
- How do they work?
- Check in with your clients frequently.
- Ask for feedback. Do you offer a “suggestion box?”
- Create accountability



Some Service Guidelines to Keep in Mind

- Keep the client experience in mind regardless of the service level of that client.
- Provide a little magic whenever and wherever you can.
- Greet and welcome each and every participant
- Be mindful of your body language at all times.



Some Service Guidelines to Keep in Mind

- When communicating with clients, always make contact and smile.
- Be mindful of your body language at all times.
- If you feel a challenge is brewing, provide assistance with an immediate recovery.
- There is power in the word, “Thank you.”



Make it Easy for Clients to Support You

- Try to remain on their “top of mind.”
- Make sure your clients know the best way to reach you.
- Make it easy for your clients to help you.
- Give your clients a “suggestion box.”
- Create positive relationships with your clients.



Start Strong;
Finish
Strong



“If you offboard your clients as well as you onboard them, you may be able to turn them into your ambassadors.”

How to Properly Offboard Your Clients

- Clearly identify the end of your service.
- Make it easy for your couples to leave you.
- Give homework.
- Give one more “wow” before you sign off.



How to Properly Offboard Your Clients

- Send a final invoice and inform them of gifts and “freebies.”
- Send a thank you card and/or gift
- Ask for feedback, reviews and referrals
- Remind your client of your legacy services
- Stay in touch



Thank You!

