

CLIENTELING



A LOST TRADITION: WRITING CARDS

Reviving the lost tradition of writing hand-written cards adds a personal touch, fostering genuine connections in a digital age, and conveying sentiments with a warmth and authenticity that electronic communication often lacks.

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How to use Weekly Meeting Topic Guides

What are the Weekly Meeting Topic guides: One-page topic guides to help managers educate their sales team on sales growth topics and strategies.

Goal: BSPK morning meetings are designed for one simple purpose:
to modify behaviors in order to achieve a desired result.

Weekly Topic: The meeting is intended to be delivered daily for an entire week in order to ensure that all team members have fully absorbed the content before moving on to the next topic.

Sections: BSPK morning meetings are divided into 4 easy steps.

- Introduction
- Questions for the team
- Teach the topic
- Set the expectation.

Meeting time: A morning meeting should be no longer than 15-20 minutes.

Best practices:

- Review the content before morning meeting
- Deliver the meeting in your own voice without reading verbatim from the meeting notes
- Use guide as a reference but always make eye contact with your team
- After the meeting, be present on the sales floor and be prepared to provide in-the-moment coaching where needed

A lost art: hand-written cards

Step 1 Introduction

Good morning, team. This week we will be discussing best practices for hand-written cards. Sending hand-written cards used to be common but in our digital age, it's a rare gesture. When done properly, hand-written cards can be an excellent way to show your appreciation and stand out from the competition.

Step 2 Questions for the team

- Have you ever received a hand-written card from a business? How did it make you feel?
- When was the last time that you sent a hand-written card to one of your clients? How did they respond?

Step 3 Teach the topic

Let's review some best practices for sending hand-written cards.

- It's always a best practice to send a hand-written card to first time clients. For subsequent purchases by the same client you may send a thank you email.
- Always use brand approved stationery for writing your cards. If you are sending a card for a special occasion and wish to purchase a greeting card from the store, make sure to seek approval from management.
- Always use a rollerball pen. Rollerball pens produce a line that's thicker and more consistent than a ballpoint pen. Never use a pencil or markers.
- Make each card personalized to the recipient.
- Use proper grammar. Management is always glad to look over your cards to check verbiage and spelling.
- Make sure to document that you sent your client a card in their client profile.
- Lastly, don't forget your stamp!

Are there any questions?

Step 4 Set the expectation (this is how you can say it)

This week we are asking for a renewed focus on sending hand-written cards. I would like for everyone on the team to send a MINIMUM of 10 cards this week. Please leave your addressed cards on my desk unsealed. I will take care of sealing them and mailing them out for you.