

# Client Goodwill and Retention

*Creating a Professional Practice*

# The Value of Goodwill

*“On the average it costs 6x as much money and takes 3x the effort getting a new client as retaining one.”*

- Cherie Sohnen-Moe



# What is Goodwill?



- The standing a business has with its customers
- Kindly feeling, friendly attitude
- Effective use of resources to maintain clients than to constantly seek new ones

# Goodwill through Relationships

- Building relationship establishes rapport & trust
- Relationship => intimacy
- Intimacy => more access for holistic care
- Requires time to build



# Client Retention

- Clients return for...
  - Personal growth
  - Health maintenance
  - Continuing education of themselves
  - Issues requiring continuity of work



# Customer Service

*Exceptional*



*Good*



Baseline



*Which characterizes your practice?*

# Pre-Session Conduct

- Set tone for initial contact via outgoing message
- Be prepared when returning calls
- Focus on client, establish rapport: **listen**
- Return calls promptly (24 hours)
- Be directive with next steps
- Maintain integrity with follow-through



# Session Conduct

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- Initial
  - Rapport-building: open-ended, inviting questions
  - Intake
    - Feeling, location, intensity, acute/chronic
    - Expectations, session description
  - Summarize information given by client and *ask for confirmation* of chief request



# Session Conduct (2)

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- Ongoing
  - Session environment
  - Client comfort (position, temperature), initially and throughout session
  - Personal hygiene
  - Time: respect boundary of session
  - Check-in at session end, update notes

# Follow-up

- After initial session
  - Contact within 3 days
  - See if desired benefit was achieved
  - No pressure, not “selling” what neither individual wants
  - Client is helped in a manner which his valued by him/her



# Follow-up (2)

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- During and after regular sessions
  - Greeting: remember & acknowledge personal items, health aspects
  - Confidentiality
  - Respect for state of being
  - Remember client preferences (use system)
  - Call 2-3 days after profound sessions

# Personal Boundaries



- Ethics of conduct
- Scheduling to remain attentive & fresh
- Personal problems/catharsis
  - Keep yours to yourself
  - Heal with receptivity, non-judgment
- Communicate clearly and keep agreements
  - Be honest, approachable, and LISTEN

# Client Appreciation

- Be genuine, authentic
- Special events
  - Birthdays
  - Thank-you notes, small gifts
- Develop rewards for referrals
  - Provide discounts (\$ or %) based on number of referred clients



# Documentation

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- Maintain adequate records; be complete while neither intrusive nor excessive
- Initial intake material
  - Contact, personal/family information
  - Health, bodywork, and injury/trauma history
  - Medications, activities, life style choices
  - Referral source
  - Client signature, liability release

# Documentation (2)

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- Ongoing session record (SOAP notes)
  - Subjective and Objective presenting traits
  - Assessment of work to be completed and effect
  - Plan for ongoing treatment; focus for next time
  - Review *chief complaint*; response card
- Use your **System**
  - Notebook/binder, database, pictures/diagrams

# Client Education

- Provide articles for special interests, areas of growth, or health concerns
- “First Massage” handout
- Recommendations
  - Water, bathing/Epsom salts
  - Stretches, what to expect in next 24-72 hours
  - Nutritional/supplemental recommendations
  - Complementary therapies from referral base

