

Kathleen Vallejos - Follow Up Profit Secrets

In this interview Kathleen talks about how to follow up to maximize your time and efforts to create a profit. You'll learn:

- if your business is a good fit for follow up
- the most common obstacle to following up
- the biggest misconception about following up
- the best strategy to begin following up in your business

Kathleen shares several examples from her own business to illustrate the importance of following up for success as small business owners or professionals.

The Interview

Ana R: *This is Ana Rosenberg and today we are here with Kathleen Vallejos to talk about following up.*

One thing that interests me is the fact that successful professionals and business owners make it a priority to build relationships and follow up with people. So let's talk about that first.

What types of clients do you work with? Who are the types of people that you are helping out there? What type of industries and businesses are they in?

Kathleen V: Thank you Ana, those are great questions. I primarily work with small business owners and professionals who have an established business and they probably have about 1-10 employees.

But mostly they're busy. They're often working *IN* the business instead of *ON* the business. They're constantly chasing after new business, as a result they often have an unpredictable cash flow and they're going through cycles of feast and famine.

What I do is use a strategic follow up system that helps professionals get in front of their perfect customer, client, or patient and create a constant flow of loyal customers, clients or patients who then will refer more folks to them for business

The kind of business itself could be a chiropractor, an accountant, interior designer, handyman service; they could be in insurance, real estate, a financial advisor, doctor, dentist, or contractor. Just about anything really.

Ana R: *I'm curious, what led you to this field?*

Kathleen V: Well interestingly enough, I believe I was born an entrepreneur but didn't know it.

As a kid I had the experience of my mom not really knowing how to make money, how to take care of herself, or how to run a business. And I'm not blaming my mom, she did what she could, but we experienced the reality of child support and food stamps. That proved an unpredictable financial situation and it was just not good. So it's no wonder I had the entrepreneurial spirit.

When I was young, around the age of 10, I quickly realized that the fastest way to making some money is to provide services to people. And so I started offering services to my family members. We all lived in the same area on the same road, so I would go from house to house talking to my aunts and uncles to find out if they needed help cleaning, organizing, or babysitting. In exchange they paid me. Sometimes my Gramma gave me a whole dollar to dust her entire house.

Ana R: *Wow*

Kathleen V: Consequently I don't dust my own house now, but...

Ana R: *I can understand that.*

Kathleen V: Yes, yes.

I basically understood that if I helped someone get what he or she wanted, they would pay for it. That's when I developed my caring for people that are business owners.

In college I studied human behavior and education, earning a Master's Degree in Human Development with a specialty in Leadership in Education and Human Services. I worked as a teacher for a short period of time after college and then also for several different small businesses.

While working for small businesses I developed great insight as to what made those businesses successful, as well as, what made some small businesses struggle all the time.

It was there it broke my heart to see that something so simple as following up - the fastest, most direct path to growth, more revenue, and more income, was severely neglected.

Later I spent several years as a volunteer firefighter. We got the same training as paid firefighters and did the same work, but we also had the added component of fundraising to support our work.

So while I was there I sold raffle tickets to raise money and I also went into burning buildings to help put out fires. It was crazy. It was a crazy courageous time in my life.

But...it doesn't really compare to the risks you take as a business owner.

As a business owner you are often providing some kind of service for customers, clients, or patients, but you are also responsible for the financial livelihood of your employees. They depend on you to bring in the business that writes the paychecks to feed their families and that takes a lot of guts.

It also takes some strategic planning and consistent implementation of systems to make your business run smoothly, effectively, and to create a profit. Without effective systems, several obstacles arise that can put your profits at risk and take away the freedom that you wanted when you started your business in the first place.

Ana R: *That's something that is so important and so common that people overlook. What are the problems that these business owners are having?*

Kathleen V: Primarily they're busy. Everybody's busy. But these business owners, they're busy. And commonly they're working **in** their business instead of being strategic and working **on** their business as the CEO.

They're running their business as if they are a freelancer - which is basically chasing after a new customer. They go get a client, do the work, and then go out to find another client again. This causes cycles of feast and famine because they don't have a pipeline full of customers, clients, or patients.

They're doing this instead of following up with the existing customers, client, or patients that they already have who are much more likely to buy from them again. They've already built the trust, like, and know factor with their current customers, clients, and patients.

Ana R: *So what's the most common obstacle that prevents business owners from effectively following up?*

Kathleen V: Well they don't really have a system. They probably have a system for answering the phone and handling a new business call. But they don't have a system for how to follow up with people and they are unsure of how to go about that process.

Ana R: *A lot of people when they think about following up they might start feeling uncomfortable. What do you think is the biggest misconception about following up?*

Kathleen V: I think a lot of folks falsely think that when they follow up with someone that they are pestering them. That's just simply not the case.

There have been many times in my own life when dealing with businesses that I've wanted to do business with but simply got busy myself. When they did follow up I was glad they had because I had simply forgotten.

Just to give you an example, I've worked with an Accountant and set up several campaigns for her, and 2 of them included - a follow up when taxes were done and then a fall notice regarding preparations for the end of the tax year.

Think about a CPA or an accountant like a farm. A farm has different seasons, so does a CPA. People want to hear from their CPA in season so that she can let people know when their taxes are ready and when it's time to prepare.

You know you're going to hear from your accountant in January to start getting ready for filing your taxes in March or April depending on if you're a business or you're doing your personal taxes with her.

But the most important thing here is the fall campaign that we did. It was based on adding value. When people need to know about their tax incentives and deductions, they need to know about it before the end of the year so they can still take action.

So when she's following up with them in September or October they still have time to take any actions they need that's going effect their taxes for that year. If she waited until the following year they would not be able to make any changes.

So she didn't have to feel like she was pestering people, people actually needed to hear from her and were grateful to have her reach out.

Ana R: *I see. It's all about adding value. So what is the biggest pitfall for business owners and professionals?*

Kathleen V: This comes from constantly chasing the new customer. They are leaving money on the table from their current customers because they aren't doing any follow up with them.

Ana R: *So how can the business owner and the busy professional avoid or overcome this obstacle and follow up effectively?*

Kathleen V: That's a great question and I'm going to share an example from one of my clients to help answer that.

One of my clients is a farm. Before I started working with them their problem was reaching their customers in a timely manner. They had a friend of the family doing their website and this person was often unreachable to make the updates needed, and the farmers were sending personal emails out when they needed to give notice to their customers on what produce was ready.

This was a pick-your-own farm so it's essential that they get in contact with their customers when things are ready and ripe to be picked.

When I met with them they were definitely ready to hand everything over to a professional instead of trying to do the work themselves, because after all, they are in the farming business not in the marketing business.

As a farm kind of business they have an urgency factor because food goes bad. If the strawberries are good this weekend they need to contact people this weekend.

They can't wait a week. They can't wait until someone feels like it. It's got to be taken care of now.

So we put together a system to collect contact information from people that were eager to hear from them when the strawberries, or the apples, or the peaches were

ready. It was great. People would actually refer them to their friends and family who live nearby.

One of the tools that we did use with them is Facebook to follow up and to keep people up to date.

We put together a whole system for the year that keeps their customers up to date on what's happening, when it's happening, and what's ripe and ready to go. So now they can get customers on demand.

If the strawberries are ready on Tuesday, they can send a notice out on Tuesday to let folks know.

Having this system in place provided the opportunity for them to add other premium services and events that had a bigger profit margin.

This system allows them to communicate about all these premium services and events they have added, which have significantly contributed to their increase in income.

They shared with me that they haven't been able to keep up with customer demand. They have grown from a \$75k season to over \$200k season in just a couple of years and they'd have an even bigger season if they could keep up with the customer demand!

So, you just have to do it!

Ana R: *Wow, I guess that's a good problem to have, a high quality problem to have. So what would be your best piece of advice to a small business owner or professional about considering putting a system in place?*

Kathleen V: It's really very simple. You just need to work with a professional to create a strategy that works for your specific type of business and the needs of your customers, clients, or patients.

You just need to do it.

Having this system in place prevents you from spending your personal time trying to get it all done. The system does it for you. This gives you the chance to work on your business and not in it.

You don't cut your own hair and you wouldn't try to do your own root canal, you pay a professional to do that. The same principle applies here.

Ana R: *Okay, so we're aware as business owners that the fortune is in the follow up. So what keeps professionals and business owners from doing it?*

Kathleen V: There's three primary factors that keep business owners from effectively following up.

The first one is pretty simple, it's just time. Again we've already mentioned several times that business owners are busy, but with a clear strategy and the proper system in place, it won't take up personal time.

The second factor is money. There's often a misconception that it's going to be expensive to put a system in place but you'd be surprised just how affordable it really is. Depending on the kind of business you're in, often gaining just 1 or 2 new loyal customers is enough to cover the costs of implementing the process. And in some cases it pays for itself and then some.

When you use the strategy you're going to stop wasting money and will get more efficient in your business because you will be continuing to talk to those customers that you already have, that you've already spent the time and the money and the effort to get.

The third factor is often who. Who is going to handle getting the system put in place? Who is going to handle the follow up?

In most cases I implement the system and the ongoing follow up for my clients. Most clients choose this option so that the team that they already have working in their business doesn't have to learn one more thing to do.

But if that doesn't suit your needs I can always train an assistant on how to use the follow up system. Or you can, as a business owner, try to learn how to do it yourself.

But again, here I would state that, if you need a haircut you're not going to go to beautician school to learn how to cut your own hair or you're not going to go through tax and accounting courses to learn to do your own taxes. You are going to have your CPA do it.

There are \$20 tasks and \$200 tasks, as the CEO of your business you need to determine what you're going to spend your time and money on.

People might often think that their business is different and so this doesn't apply to them, so let's take a look at who this might not be suited for.

I thought long and hard about this and I've worked with all kinds of professionals – farms, accountants, financial advisors, interior designers, and insurance.

Ana R: *Are there any businesses that this would not work for?*

Kathleen V: A business I think that this is not really suitable for is people in the funeral business. For the rest the principles are the same, the strategy is just different.

So for business professionals it's a question of developing a strategy for the business that you have but the principles still apply. Remember the seasons we discussed? In season for a farm is different than in season for a CPA; so it's the same principle, the follow up is still going to occur, but it's going to be a different strategy.

If you are a business owner or a professional, you really need to ask yourself HOW will this apply to my business NOT WILL this apply to my business.

Ana R: *Let's talk about newsletters a minute. How effective are they really for the small business owner?*

Kathleen V: I know some people might have had bad experiences with newsletters because they tried to write one and then they sent out one once and never again. But once they have a system in place, it would be very easy to make the newsletter part of the system.

Ana R: *What do newsletters do for a business owner or professional?*

Kathleen V: Newsletters allow the business owner to add value to strengthen the relationship with clients or prospects. They help keep your business top of mind for when a potential client becomes ready to buy.

Newsletters make it easy to forward something useful to a friend or an associate, in this way the business owner or professional can get referrals.

They even allow busy professionals to make offers.

Most importantly, let's look at the positioning. A newsletter, if done properly and regularly, gives you instant credibility because you are a person who keeps your word. If you said once or twice a month you'll be sending the newsletter and once or twice a month you are in their inbox, you become the expert who keeps their word.

The fact that you write and publish your newsletter differentiates you from everybody else. The word authority comes from the word author. Articles, blog posts, newsletters all work together to position you as an expert with a perspective who goes beyond their expertise.

Ana R: *Can you give us some final tips of what to include in a newsletter?*

Kathleen V: A personal message from the business owner or professional allows you to address different concerns people have and provide solutions to problems

your reader might need help with. That would help to establish you as an authority in your field.

Write something they will find useful, inspiring, or funny that answers a question they have. Your use of variety is good – share tips or your opinion on something, share a different point of view than the mainstream about your topic of expertise.

You could also share some results you helped someone else get – make it a case study or a story, not just a testimonial. A story is more personal and will connect with the reader.

Newsletters also provide an opportunity to keep the reader informed about your business, about you, what makes you different, and it showcases your personality.

Best tip – it's all about your reader, it's not about you.

The newsletter has the capability of turning someone into a client, a client that buys again and again, and a client that refers you to others.

Ana R: *How can the reader find out more about how to follow up?*

Kathleen V: Again that's a great question and I have prepared a free report that professionals can download that will be with the other bonus materials from the book.

It's over 25 campaigns or opportunities that allow you to get in touch with past clients, present clients, or for following up. These are basically 25+ reasons people will be delighted to hear from you.

Ana R: *What about your system? How can people learn more about your system?*

Kathleen V: On my website I put together this free report called the Business Success Blueprint, it explains my whole process and shows you how to never have to look for a new customer again.

Ana R: *Wow, that's actually very, very clever. Well I certainly appreciate that and we certainly appreciate the interview too, Kathleen. I want to thank you for sharing the things that most professionals and business owners don't hear about from follow up experts. So I really want to thank you for sharing that.*

Kathleen V: You're welcome.

Kathleen Vallejos - Creator of the Business Success Blueprint – shows small business owners and professionals how to get more customers, clients, or patients; make more money, and keep their regular customers coming back for more.

Kathleen has been recognized as a Top Professional in Marketing and Consulting and international media such as ABC, NBC, CBS, and Fox have cited her saying, “Presenting yourself as an author or speaker with media authority establishes your credibility as the obvious choice in an indistinguishable sea of options. Hard work and referrals are simply not enough to launch your business to the top.”



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