

## Synergistic Systems

By Kay L. Cross, MEd

# Keeping the Fires Burning & the Systems Churning

### Follow these tips to maintain the synergy and momentum you've created for your clients and yourself.

Creating synergistic systems—cleaning out, organizing, thoughtfully managing your work hours, planning, tracking, implementing and adjusting—requires time to think, plan and do. This has been a busy but productive column, and we will end it by addressing how to keep the fires of motivation going and the systems working through regular client contact and focused marketing.

### Regular Client Contact

We all see our clients on a somewhat regular basis, from several times per week to once every couple of months. However, that type of contact is not enough. We need to make extra efforts to build a connection and a relationship with the people we serve. Regular client contact outside of training sessions is critical. There are several ways I accomplish this task, through personal and general mailings:

#### Personal Mailings

- \* Birthday cards (and gifts to key clients).
- \* Training anniversaries. I send a card congratulating and thanking each person for “x” years of being a dedicated client. I often include a small gift card for coffee or other treat.
- \* Personal notes of encouragement or congratulation for progress made.

#### General Mailings

- \* Holiday cards—any holidays that you like to celebrate or that are important to the client.

- \* Monthly mailings. You can use a postcard-size mailer and mail it to former, current or potential clients. Include fitness tips, current important research and motivational thoughts. Decide on a frequency that is manageable for you and often enough to keep you in their minds. You can partner with another business to make it more affordable. Target the people who can afford your services and can meet your criteria of an ideal client.

- \* Educational articles. Provide your current clients with educational articles on a monthly or bimonthly basis. (IDEA members are free to copy and distribute the Fitness Handout that appears in each issue of *IDEA Fitness Journal*.) My clients prefer to receive paper copies they can carry with them or pass on. E-mail is overused, and people tire of too much junk mail. Ask your clients if they are reading what you give them. At one point I was providing one handout per week, which turned out to be too much for them to keep up with.

One of my coaching clients, a Keller Williams Realtor, uses their “33 touches” philosophy. She “touches” potential and former clients 33 times per year through various mailings. She has found this frequency to have direct correlation to the numbers of listings, properties sold and thus income earned—amazingly uncomplicated and very effective.

### Focused Marketing

One mistake that leads to the downfall of many businesses is lack of care and poor

customer service. If the customers do not feel cared for or feel they are just a step on the way to making a dollar, they will leave to get their needs met elsewhere. Another mistake is the failure to continue focused marketing. When business is great, it is easy to get lazy about marketing, or just to get too “busy” to do anything about it.

Compare the purpose of marketing to the purpose of exercise. The idea of regular exercise is to improve the quality of life and prevent or lessen your chances of disease in the future. Exercise is intended to be preventive. Marketing is also intended to be preventive. Marketing prevents the “disease” of dwindling client numbers and increased turnover.

Regular and focused marketing improves your likelihood of attracting new clients in the future. Its regularity is to remind people that you are there, what your service provides and that you are a solid staple in the community. But the key here is focus. Who can afford your services? Who needs your services? Where are the people who need you?

The monthly mailings described above are a great way to market, but not the only type of marketing you need. You must personally involve yourself in marketing. Get your own physical presence out there and meet people. As I sit here writing this article at my favorite coffee/tea place, I’m laughing to myself as I think of the dozens of contacts and friends I’ve made here over the last few years. By being out in the public, I met people on a regular basis and developed new relationships. As they learned more about me, doors for business began opening; doors that would never have opened from an impersonal direct mailer. How do you accomplish focused marketing?

- \* Determine which clientele you want to target.
- \* Find out where they live or socialize.
- \* Visit the places they frequent.
- \* Join an organization they are a part of and participate monthly.
- \* Speak to their groups.
- \* Mail them information about your services.

- \* Develop relationships with a few key people (whom I refer to as “Centers of Influence”).
- \* Call the people you have met and invite them out for coffee.
- \* Make your intention “building relationships and helping others” versus “getting new clients.”
- \* Get yourself out in the community once a month—luncheons, mixers, volunteer work.
- \* Create a simple marketing plan and stick with it, feast or famine.

### Maintaining Synergistic Systems

We all struggle with keeping the flow of life simple, calm and orderly, yet fun and spontaneous. It seems that the outside world tries harder each year to close in on us. There is more junk mail, more advertising that says: “You need this! This is such a deal you can’t pass it up! If you buy this car, it will change your life! Only people who spend over 300K on a house are truly fulfilled. If you are running 90 miles per hour every day, you are somebody.” Don’t fall for the delusion. It is a hype that will keep you on the treadmill of always needing more and feeling that nothing you have is ever enough.

I have discovered that there is very little in life that I really need to be happy and healthy: a good home, clothes, healthy food, sleep, regular exercise and lots of love from my friends and family. The rest is icing on the cake. Keep your focus on maintaining the progress you have made in creating systems to make your life easier.

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## 10 STEPS TOWARD SYNERGY

To maintain the momentum you created this year, keep these 10 steps of synergy fresh in your mind:

1. Clean out on a regular basis—keep, throw away and give away. Live a simple, uncluttered lifestyle.
2. Plan a filing system that makes sense to you, and file instead of “pile.”
3. Create functional spaces at work and home that “feel good” to you. Quit worrying about the spaces you cannot control (spouse’s office, teen’s room, etc.).
4. Manage your business hours: 70% client hours, 20% business administration, 10% business development and planning.
5. Create systems for client management: new client inquiry, forms and feedback, training program updates, assessments, etc.
6. If possible, limit your work hours to 40 per week. Keep a log.
7. Accomplish regular client contact through general and personal mailings.
8. Practice focused marketing by getting yourself out in the public eye.
9. Keep your personal needs and values in the forefront of your mind.
10. Re-evaluate your goals each year (personal and professional).

After months of working on systems and getting your life in order, your life manager peers in on your week of activities. In place of stress, rushing around and running late, does he now see peace, calm and harmony? Manage each day as if your life depended on it.