

## LOYALTY ENGAGEMENT INVENTORY

### HOW TO USE THE LOYALTY ENGAGEMENT INVENTORY

Each of the loyalty categories are traits or outcomes you want to have in your current clients and build in your prospects over time, once they become clients. As you read the following statements in each category, how would you rate yourself?

On this scale, 1 means the loyalty factor is extremely low, and 5 means the loyalty factor is extremely high.

If you're evaluating a prospect and don't have enough information, this tool can be used to work with them, so you better understand what would make them raving fans and advocates.

CATEGORY	STATEMENT	RATING (1-5)
<b>Trusted Advisor:</b> I have trusted advisor status with this current client. If this is a prospect, I am firmly establishing myself as a trusted advisor	I proactively provide value, in the form of expertise, connections, or other resources.	
	This prospect/client consults with me early when issues arise. They don't wait until it's an even bigger issue.	
	This prospect/client turns to me for guidance within my area of expertise.	
	This prospect/client turns to me for guidance outside of my area of expertise, because they know I can connect them to the right resources.	
	I am continually learning and curious on a wide range of topics, so I can share that learning with this prospect or client.	

(continued)

# LOYALTY ENGAGEMENT INVENTORY *(continued)*

CATEGORY	STATEMENT	RATING (1-5)
<b>Creating Advocates:</b> This client is actively engaged and advocates on my behalf. The relationship has helped me to exponentially grow my book of business.	This client actively refers business to me.	
	This client provides testimonials for me and willingly talks about their experience to my prospects when I make the request.	
	This client actively seeks out ways for us to continue doing business together.	
	This client willingly uses their own social capital to open doors for me.	
	If my advocate at this client left their current employer, they would bring me into their next employer.	
<b>Overall Experience:</b> This prospect/client buys on value, they don't default to price.	This prospect/client is a value-based buyer. They place significant business value on my product or service.	
	This prospect/client doesn't typically try to negotiate down on price.	
	Our delivery experience after the sale is consistently strong.	
	I have a deep understanding of what my prospect or client values. That understanding is documented, and I review it regularly with my client.	
	I have created ways for my customers to provide feedback beyond my company processes. I regularly monitor and respond to that feedback.	
	How I deliver the product, service, or experience differentiates me from my competitor.	
<b>Getting to Yes:</b> This prospect/client sees us on the "same side of the table." They always look for ways to create a Yes situation.	I've successfully recovered from a past issue at this client.	
	The client will proactively tell me when something isn't working. They'll give me a true chance to resolve it, or we'll resolve it together.	
	I can openly tell the client when something isn't working. I'll give them a true chance to resolve it, or we'll resolve it together.	
	There's a high level of accountability in our relationship, and a very low level of blame.	

## LOYALTY ENGAGEMENT INVENTORY *(continued)*

### USING 100 POINTS, THIS SCALE WILL HELP YOU INTERPRET THE DATA.

**0-40 POINTS:** Your loyalty factor is low and could indicate a disengaged client. This is an opportunity to determine what level of investment you feel is worth making to improve the relationship. This score can also indicate the need for more information, or you could be in the beginning stages of the relationship and need more time.

**41-75 POINTS:** You likely have a satisfied but not fully engaged client. Look for any patterns to direct you on where to invest in improving loyalty. This is the widest ranging tier, so one thing to keep in mind is that the engagement level of a client with a score of 45 is likely very different from one that scores 75.

**76-100 POINTS:** You likely have a highly engaged client, a “29 percenter.” This is likely a cornerstone or flagship client, and one that’s worth the continued investment. Take what you’re learning from this client and apply it to other clients where you’d like to increase loyalty.