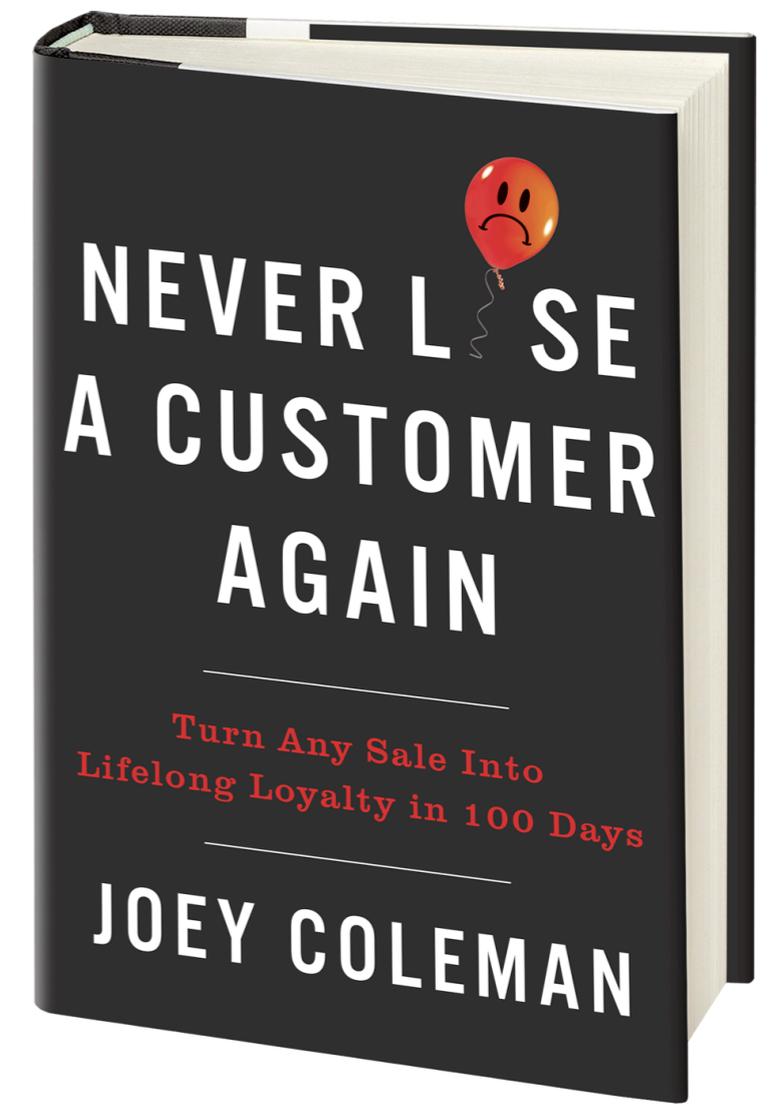


DAY  
100



**Audience  
Information  
Tracking**

[www.JoeyColeman.com](http://www.JoeyColeman.com)

# Thank you... and best of luck keeping track of your customers' information!

Thanks so much for purchasing my book, *Never Lose a Customer Again* - and for reading all the way to page 331 to see this offer for a PDF version of the *Audience Information Tracking Worksheet*! The worksheet is divided into two parts: (1) an assessment of your current efforts, and (2) a plan for tracking audience information in the future. As a reminder, I use the word “audience” instead of customer, client, etc. because I want you to think of “performing for your audience” - those people who give you their time, money, and attention when they purchase your products or services.

## **Part 1: Assessment of Your Current Efforts**

To see how much you know about your current customers, pick a favorite customer. Are you thinking of one? Great. Now go to pages 3-4 of this document and see how many fields you can fill in as you think about the customer you selected.

Don't feel bad if you get a few questions into the assessment and start to feel overwhelmed. This is why I recommend keeping track of your customer information somewhere other than in your mind. By writing customer information down and storing it in a database that is accessible by your entire team you not only keep the document growing with each piece of data you glean, but you also ensure that every member of your team has the information they need to make personal and emotional connections with your customers.

Once you've completed the exercise, objectively evaluate your results. How did you do? Did you remember many things about your customer, a few things, or hardly anything at all? The good news is that you probably filled in at least some information. The bad news is that I asked you to complete the worksheet about your “favorite customer.” Would it be safe to assume that you would have been less confident in your answers if I got to select the sample customer randomly from your complete customer list? Don't feel bad. We're going to address this in Part 2 of the process!

## **Part 2: Tracking Audience Information in the Future**

Now that you've seen the level of information you're tracking now, and the potential information you could track in the future, complete pages 5-6 of this document by deciding which types of information you will *always* track, which information you will *never* track, and which information you will track sometimes - but not worry about doing so consistently.

Use your answers to further define the fields you track in your customer relationship management (CRM) database, as well as identify ways to gather the information you seek from customers via the various interactions you have with them in *The First 100 Days*®.

## **BONUS STRATEGY: Getting Your Team Involved**

The best way to build a robust database of information about your customers is to make sure that every member of the team is regularly gathering customer intelligence and putting it into your customer database. The last two pages of this document (pages 7-8) suggest a process whereby you can get your team members actively engaged in the collection of customer information. This is an evolving process and requires a little getting use to, but when done effectively and consistently, everyone on your team will be better prepared to create incredible personal and emotional connections with your customers. Best of luck as you work to track even more information about the audiences you serve!



# Audience Information Tracking - Part I

## BASIC INFO

Date Data Originally Acquired \_\_\_\_\_  
Date Data Last Acquired \_\_\_\_\_  
First Name \_\_\_\_\_  
Last Name \_\_\_\_\_  
Nickname \_\_\_\_\_  
Maiden Name \_\_\_\_\_

## PROFESSIONAL

Company Name \_\_\_\_\_  
Company Address \_\_\_\_\_  
Business Phone \_\_\_\_\_  
Business Email \_\_\_\_\_  
Business Mobile \_\_\_\_\_  
Position/Title \_\_\_\_\_  
Professional/Trade Association Memberships \_\_\_\_\_  
Other Key Professional Elements \_\_\_\_\_  
Sensitive Professional Elements \_\_\_\_\_  
LinkedIn Profile \_\_\_\_\_  
Twitter Profile \_\_\_\_\_  
Proudest Professional Achievement \_\_\_\_\_  
Long Term Professional Goals \_\_\_\_\_  
Short Term Professional Goals \_\_\_\_\_

## WORK HISTORY

Former Company #1  
Location \_\_\_\_\_  
Position/Title \_\_\_\_\_  
Dates of Employment \_\_\_\_\_  
Key Takeaways \_\_\_\_\_  
\*Attitude Toward Position/Company \_\_\_\_\_  
Former Company #2  
Location \_\_\_\_\_  
Position/Title \_\_\_\_\_  
Dates of Employment \_\_\_\_\_  
Key Takeaways \_\_\_\_\_  
\*Attitude Toward Position/Company \_\_\_\_\_

## PERSONAL

Home Address \_\_\_\_\_  
Home Phone \_\_\_\_\_  
Home Email \_\_\_\_\_  
Home Mobile \_\_\_\_\_  
Involvement within Community \_\_\_\_\_  
Clubs \_\_\_\_\_  
Hobbies \_\_\_\_\_  
Interests \_\_\_\_\_  
Favorite Sports & Teams (spectator) \_\_\_\_\_  
Favorite Sports & Teams (participant) \_\_\_\_\_  
Favorite Vacation Type/Location \_\_\_\_\_  
Political Affiliation \_\_\_\_\_  
\*Attitude Toward Political Affiliation \_\_\_\_\_  
Religious Affiliation \_\_\_\_\_  
\*Attitude Toward Religious Affiliation \_\_\_\_\_  
Other Key Elements \_\_\_\_\_  
Sensitive Personal Elements \_\_\_\_\_  
Facebook Profile \_\_\_\_\_  
Twitter Profile \_\_\_\_\_  
Drinker - Y/N \_\_\_\_\_  
If yes, Favorite Drink \_\_\_\_\_  
Smoker - Y/N \_\_\_\_\_  
If yes, Signature Brand \_\_\_\_\_  
Height (approximate) \_\_\_\_\_  
Weight (approximate) \_\_\_\_\_  
Shirt Size \_\_\_\_\_  
Technology of Choice \_\_\_\_\_  
Car of Choice \_\_\_\_\_  
Proudest Personal Achievement \_\_\_\_\_  
Long Term Personal Goals \_\_\_\_\_  
Short Term Personal Goals \_\_\_\_\_

## PREFERENCES

Preferred Name \_\_\_\_\_  
Preferred Mailing Address \_\_\_\_\_  
(business, home, other) \_\_\_\_\_  
Preferred Email (business, home, other) \_\_\_\_\_  
Preferred Phone (business, home, other) \_\_\_\_\_  
Preferred Day of Week to be Contacted \_\_\_\_\_  
Preferred Format of Communication \_\_\_\_\_  
(mail, email, phone, in person) \_\_\_\_\_  
Preferred Frequency of Communication \_\_\_\_\_  
(daily, weekly, monthly, quarterly, etc.) \_\_\_\_\_

## BACKGROUND

Date of Birth \_\_\_\_\_  
Birth Place \_\_\_\_\_  
Hometown/Home State \_\_\_\_\_  
Siblings (names, ages) \_\_\_\_\_  
Other Key Background Elements \_\_\_\_\_  
Sensitive Background Elements \_\_\_\_\_  
High School \_\_\_\_\_  
Location \_\_\_\_\_  
Year Graduated (\*if) \_\_\_\_\_  
Activities \_\_\_\_\_  
Honors \_\_\_\_\_  
\*Attitude Toward Not Graduating High School \_\_\_\_\_  
College \_\_\_\_\_  
Location \_\_\_\_\_  
Year Graduated (\*if) \_\_\_\_\_  
Activities \_\_\_\_\_  
Honors \_\_\_\_\_  
Fraternity/Sorority \_\_\_\_\_  
\*Attitude Toward Not Attending College \_\_\_\_\_  
\*Attitude Toward Not Graduating College \_\_\_\_\_

# Audience Information Tracking - Part I

## FAMILY

**Spouse/Partner/Significant Other**  Yes  No

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Occupation \_\_\_\_\_

Education \_\_\_\_\_

Interests \_\_\_\_\_

Anniversary \_\_\_\_\_

**Former Spouse/Partner/Significant Other**  Yes  No

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Occupation \_\_\_\_\_

Education \_\_\_\_\_

Interests \_\_\_\_\_

\*Attitude Toward Former Spouse/ \_\_\_\_\_

Partner/Significant Other \_\_\_\_\_

**Child #1**  Yes  No

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Age (date) \_\_\_\_\_

Education \_\_\_\_\_

Interests (Hobbies, Activities, Etc.) \_\_\_\_\_

**Child #2**  Yes  No

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Age (date) \_\_\_\_\_

Education \_\_\_\_\_

Interests (Hobbies, Activities, Etc.) \_\_\_\_\_

**Child #3**  Yes  No

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Age (date) \_\_\_\_\_

Education \_\_\_\_\_

Interests (Hobbies, Activities, Etc.) \_\_\_\_\_

Pet Breed/Type \_\_\_\_\_

Pet Name \_\_\_\_\_

## MILITARY SERVICE

Branch \_\_\_\_\_

Discharge Rank \_\_\_\_\_

Duty Postings/Stations \_\_\_\_\_

\*Attitude Toward Being in the Service \_\_\_\_\_

## CUSTOMER INFO

Customer Number \_\_\_\_\_

Closest Customer Persona \_\_\_\_\_

Customer Segments \_\_\_\_\_

First Customer Purchase Date \_\_\_\_\_

Item/Service Purchased \_\_\_\_\_

Stated Reason for Purchase \_\_\_\_\_

Actual Reason for Purchase \_\_\_\_\_

Results Achieved \_\_\_\_\_

Overall Disposition \_\_\_\_\_

Next Customer Purchase Date \_\_\_\_\_

Item/Service Purchased \_\_\_\_\_

Stated Reason for Purchase \_\_\_\_\_

Actual Reason for Purchase \_\_\_\_\_

Results Achieved \_\_\_\_\_

Overall Disposition \_\_\_\_\_

Next Customer Purchase Date \_\_\_\_\_

Item/Service Purchased \_\_\_\_\_

Stated Reason for Purchase \_\_\_\_\_

Actual Reason for Purchase \_\_\_\_\_

Results Achieved \_\_\_\_\_

Overall Disposition \_\_\_\_\_

## OTHER

Other Key Notes and Information

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Audience Information Tracking - Part 2

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## BASIC INFO

- Date Data Originally Acquired
- Date Data Last Acquired
- First Name
- Last Name
- Nickname
- Maiden Name

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## PROFESSIONAL

- Company Name
- Company Address
- Business Phone
- Business Email
- Business Mobile
- Position/Title
- Professional/Trade Association Memberships
- Other Key Professional Elements
- Sensitive Professional Elements
- LinkedIn Profile
- Twitter Profile
- Proudest Professional Achievement
- Long Term Professional Goals
- Short Term Professional Goals

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## WORK HISTORY

- Former Company #1
- Location
- Position/Title
- Dates of Employment
- Key Takeaways
- \*Attitude Toward Position/Company
- Former Company #2
- Location
- Position/Title
- Dates of Employment
- Key Takeaways
- \*Attitude Toward Position/Company

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## PERSONAL

- Home Address
- Home Phone
- Home Email
- Home Mobile
- Involvement within Community
- Clubs
- Hobbies
- Interests
- Favorite Sports & Teams (spectator)
- Favorite Sports & Teams (participant)
- Favorite Vacation Type/Location
- Political Affiliation
- \*Attitude Toward Political Affiliation
- Religious Affiliation
- \*Attitude Toward Religious Affiliation
- Other Key Elements
- Sensitive Personal Elements
- Facebook Profile
- Twitter Profile
- Drinker - Y/N
- If yes, Favorite Drink
- Smoker - Y/N
- If yes, Signature Brand
- Height (approximate)
- Weight (approximate)
- Shirt Size
- Technology of Choice
- Car of Choice
- Proudest Personal Achievement
- Long Term Personal Goals
- Short Term Personal Goals

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## PREFERENCES

- Preferred Name
- Preferred Mailing Address  
(business, home, other)
- Preferred Email (business, home, other)
- Preferred Phone (business, home, other)
- Preferred Day of Week to be Contacted
- Preferred Format of Communication  
(mail, email, phone, in person)
- Preferred Frequency of Communication  
(daily, weekly, monthly, quarterly, etc.)

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## BACKGROUND

- Date of Birth
- Birth Place
- Hometown/Home State
- Siblings (names, ages)
- Other Key Background Elements
- Sensitive Background Elements
- High School
- Location
- Year Graduated (\*if)
- Activities
- Honors
- \*Attitude Toward Not Graduating High School
- College
- Location
- Year Graduated (\*if)
- Activities
- Honors
- Fraternity/Sorority
- \*Attitude Toward Not Attending College
- \*Attitude Toward Not Graduating College

# Audience Information Tracking - Part 2

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## FAMILY

Spouse/Partner/Significant Other  
     Name  
     Date of Birth  
     Occupation  
     Education  
     Interests  
     Anniversary  
     Former Spouse/Partner/Significant Other  
     Name  
     Date of Birth  
     Occupation  
     Education  
     Interests  
     \*Attitude Toward Former Spouse/  
     Partner/Significant Other  
  
     Child #1  
     Name  
     Date of Birth  
     Age (date)  
     Education  
     Interests (Hobbies, Activities, Etc.)  
     Child #2  
     Name  
     Date of Birth  
     Age (date)  
     Education  
     Interests (Hobbies, Activities, Etc.)  
     Child #3  
     Name  
     Date of Birth  
     Age (date)  
     Education  
     Interests (Hobbies, Activities, Etc.)  
     Pet Breed/Type  
     Pet Name

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## MILITARY SERVICE

Branch  
     Discharge Rank  
     Duty Postings/Stations  
     \*Attitude Toward Being in the Service

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## OTHER

Other Key Notes and Information

ALWAYS  
SOMETIMES  
RARELY  
NEVER  
N/A

## CUSTOMER INFO

Customer Number  
     Closest Customer Persona  
     Customer Segments  
     First Customer Purchase Date  
     Item/Service Purchased  
     Stated Reason for Purchase  
     Actual Reason for Purchase  
     Results Achieved  
     Overall Disposition  
     Next Customer Purchase Date  
     Item/Service Purchased  
     Stated Reason for Purchase  
     Actual Reason for Purchase  
     Results Achieved  
     Overall Disposition  
     Next Customer Purchase Date  
     Item/Service Purchased  
     Stated Reason for Purchase  
     Actual Reason for Purchase  
     Results Achieved  
     Overall Disposition

# Getting Your Team Involved in Tracking Customer Information

Now that you've identified the types of information you want to track and have set up your systems to be able to effectively and efficiently record the data, it's time to start "filling in the blanks" to create a complete and accurate record for every customer you serve.

## **Step 1(a) - Existing Customers - Filling in the Gaps (Missing Data Fields)**

- 1) Select a small group of "pilot" customers (depending on the size of your organization this could be a handful or up to 100).
- 2) Determine the "missing data" in each customer record.
- 3) Divide your team into small groups to begin gathering the data. It is recommended that everyone in your organization participate in this exercise as it sends a clear message about the importance of customer experience and how everyone plays a role in delivering a remarkable experience.
- 4) Assign specific customers to each small group until all customers in the pilot program are assigned.
- 5) Set a deadline for filling in the gaps on all of the customer records.
- 6) Announce a competition with prizes for things like: the most fields completed, the most completed records total, the most interesting data found, the most creative idea for using found data, etc. By making it fun and giving out prizes, you increase the likelihood of participation and engagement.

Once you've completed the above tasks with the first group of pilot customers, select another group of customers and repeat the process. Continue this until you've filled in the gaps on every customer record.

## **Step 1(b) - New Customers**

In addition to your efforts filling in the blanks for current customers, make sure to update your new customer intake process to gather the relevant customer information at the outset of the relationship. This will allow you to continue to build the database in realtime with your new customers so you don't need to go back and get information on these customers in the future.

## **Step 2 - Use New Data to Create Wow Moments (and reinforce the importance of gathering customer data)**

Once you complete the missing data fields on all of your customers, and you have a system for getting complete data early on in the customer relationship for any new customers, you can begin to use the gathered information to create "Wow" touchpoints that strengthen personal and emotional connections. There are a number of ways to create "Wow Moments" including:

### ***Personal Wows***

The easiest way to create a "Wow" touchpoint is to use points of personal and emotional connection when communicating with individual customers. This can be as simple as asking them "how their son Billy is doing at UNLV" (where your records track the names of your customers' children and the schools they attend) or as complex as finding the perfect celebration gift based on a piece of data you discovered using your own research (e.g., a rare, first edition comic book for a client who loves a particular superhero).

# Getting Your Team Involved in Tracking Customer Information

## **Wow Groups**

When multiple customers have a similar interest, you can design communications that allow you to create a personal and emotional connection with all of them at the same time, using the same data points and ideas. For example if several of your customers are fans of a particular musician or band (e.g., Maroon 5), when that group releases a new record you can send it to each of your customers.

## **Customer Appreciation Events**

As you begin to notice trends within your customer base, you can start to plan customer appreciation events that are built around their interests. If 40% of your customers love to play golf, a group golf outing at a difficult to access golf course could be a great way to build rapport within your customer base.

## **Step 3 - Keep It Going**

Once you've completed the data collection effort on the first group of customers, keep things moving by selecting another group of customers to research. To make things interesting, and to build connection between your own employees, consider "permanent" teams and "shifting" teams.

### **Permanent Teams**

By retaining the same groups of employee customer research teams from task to task, you can build camaraderie and connection within specific groups of employees. This helps strengthen bonds between team members and drive overall participation and engagement within the organization.

### **Shifting Teams**

By switching up the teams after each task, it allows you to cross-train (building strengths across different research techniques), cross collaborate (build relationships across the team as individuals have the chance to work with everyone else in the organization), and cross pollinate (discover new and different ways to do the research and to use the research to Wow customers).

### **Competition**

Fostering healthy competition amongst the teams is yet another way to keep the energy and enthusiasm high. Always consider multiple awards or prizes to help incentivize different levels of creativity, participation, enthusiasm, etc.

## **Step 4 - Don't Forget Your Employees**

It's very difficult to ask employees - especially more junior members of the team and those in entry-level positions - to create remarkable experiences for your customers when they haven't had many remarkable experiences in their own lives. The typical CEO of a company has flown first class, stayed at the Ritz Carlton, enjoyed a 7 course meal, and traveled via limousine. The typical receptionist or even junior account manager probably hasn't done any of those things (going to prom in a limo doesn't count). As a result, when the CEO says "create something remarkable" for our customers, the average employee doesn't even know where to begin. Make sure you are treating your employees to remarkable experiences so they have a context for what you're asking them to create for your customers.