

# The guide to effectively working with the 5 most common types of customers



Welcome!

This guide will take you through the 5 most common types of customers and what tactics and communications styles work best with each type of customer:

1. The Controlling Customer
2. The Indecisive Customer
3. The Enthusiastic Customer
4. The Overwhelmed Customer
5. The Disappearing Customer

Remember that at the end of the day, all businesses are run by people—people who have varying types of backgrounds, knowledge, work styles, and personalities.

Learning to communicate effectively with the different types of customers (and in turn businesses) is key to running a productive and professional business.

Use this guide whenever you add on a new customer to your portfolio or feel like your at a crossroads with any of your existing customers. It's your business and your responsibility to ensure you're customers are on the right track.

You got this!

A handwritten signature in black ink that reads "Hadas". The script is fluid and cursive, with the 'H' and 'A' being particularly prominent.

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# The Controlling Customer

This customer can be incredibly intimidating, usually very demanding, and more often than not tries to micromanage every aspect of your work. They know exactly what they want to do and how they want it done; however, their decisions are usually based on their experience and knowledge and not necessarily on the ultimate way to success.

The question is how to get them to shift strategies when they are not necessarily willing to listen, rather want things done their way...



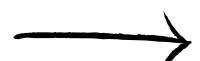
## **Set clear expectations & over-communicate**

Update this customer immediately on any changes in project scope, timelines, etc along with the reason behind the changes. Every meeting should have an agenda that is equally updated by the customer and you & each meeting should be clearly summarized in a shared document, along with action items and the person responsible for each task.



**Name-dropping** works incredibly well with this type of customer! "I saw that Nike just came out with a women empowerment campaign using X and think that based on your common target audience and business structure, that this type of campaign could fit well in your marketing."

more tips



# The Controlling Customer



## **Baby Steps**

If you want them to significantly change their strategy or processes, take them through the changes in baby steps. For example, run a new type of marketing campaign for only 20% of their customer base. Once you have proof of concept and can show them the ROI from the campaign, they will be more willing to act on your recommendations.



**Don't ever join them in a shouting match** or try to equal their aggression. Respond politely to them without raising your voice and never take their insults and criticisms personally. Try to understand why they are frustrated and wait for them to regain composure. Then, show them you understood their frustration by repeating back what you heard and offer a solution. If you don't have an immediate solution, tell them that you will look into possible solutions and get back to them. Set a very clear timeline, and make sure to stick to it!



**Be patient.** Once you've earned their trust, they will back off and let you do your thing....





# The Indecisive Customer

This customer is usually very polite and continuously asks questions, makes comparisons, and takes time to research every aspect of the project before moving forward.

They know what their ultimate goal is but don't really have an opinion on how they'd like to go about achieving their goal. The indecisiveness usually spans from the customer's fear of making a mistake or regretting their decision later on.

Although this type of customer is harmless and often enjoyable to work with, the question becomes how to make sure your work together is productive, while also giving the customer the support needed for them to feel comfortable in their decision.



## **Understand the background**

Work with the customer to understand why they are afraid of making a decision. Then, research and provide them with data-driven advice that will give them confidence when making the decision.



## **Be clear on what decisions will need to be made**

Make sure the customer knows in advance what types of decisions they will be asked to make at every step of the project so that they can plan ahead.

more tips →

# The Indecisive Customer



## **Speak to the audience**

Focus your talking points on what the customer's target audience needs/wants to see rather than making it a personal choice of the customer.



## **Give limited choices**

Limit the number of options you are asking the customer to decide on and try to communicate each option with the background of why you chose the option and how they can benefit the customer and their target audience.



**Put in the prep work** to discover the background of each project and what types of things this customer likes. Many times, indecisive customers actually have a clear type or preference but aren't necessarily aware of it. You will probably learn a lot about their preferences by work that they have already done.

# The Enthusiastic Customer

This is my favorite type of customer!

They are incredibly motivated to start doing the work, are filled with ideas, but are also open to hearing alternative ideas that they haven't considered.

Brainstorming with this customer is usually very enjoyable for both sides, and the decisions made are usually a combination of ideas from all parties.

That being said, due to their high level of enthusiasm and drive to get things done, this type of customer tends to be draining and rather needy of your time. They expect you to be available to them at all hours and tend to be a bit demanding of your attention.

Setting expectations and arming them with all the information they need to get things done on their end is crucial for your productivity.

Remember, you want to keep their enthusiasm high, but also to set boundaries so that your time is used efficiently.

All Tips →

# The Enthusiastic Customer



**Set clear timelines for the project**, as well as action items that will be required from each side. The customer needs to have a clear understanding of what you will be doing and when, and what they are expected to do and when.



**Provide all necessary resources in advance**

If the customer has action items to do on their end, make sure to arm them in advance with all of the necessary resources and/or information they will need from you to complete their action items.



**Providing the customer with any templates and/or examples** of things they need to complete will be incredibly helpful.



**Pro Tip:** video tutorials are perfect and can be reused for future customers. You may also consider creating playbooks with guidance & FAQs that you can reuse with your customers. You can use systems like Loom and Vidyard to record an explanation or tutorial, and both platforms offer free versions of their software.



# The Overwhelmed Customer

This customer is the customer who feels like they need you the most.

They are lacking in resources, background, skills, or experience in the service(s) that you're providing, and they know it! They are looking for you to do the work for them, rather than consult and help guide them to make their own decisions.

Getting time on their calendars can be a challenge, and their slow response times will usually cause delays in your work timelines.

Small changes to your project management style, along with learning to balance between the customers' schedule and your needs, is key!



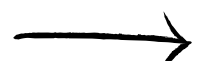
## **Prepare in advance**

Get all necessary background information from these customers before starting the project.



**Be diligent in your background research** and make sure you understand exactly what the customer is asking you to do by asking a lot of open-ended questions and summarizing all answers in a shared document with the customer.

More tips



# The Overwhelmed Customer



## **Pre-schedule all meetings**

Make sure that you schedule your periodical update meetings in advance so that you have a definite time to meet with the customer. Let them know in advance what you plan to cover during the meeting and what you will be asking of them. It's ok if the schedules or agenda items change overtime but it's easier to reschedule than to schedule with this type of customer.



## **Limit the actions items you request**

This type of customer is not usually responsive to having to complete multiple action items. So... baby steps... Provide the customer with no more than 2-3 action items for them to complete after every meeting. If that means you need to have one 30-minute meeting every week (rather than one 60-minute meeting every 2 weeks), do it! In the long run, you are spending the same amount of time with the customer, but they will be much more productive in-between meetings.



## **Offer outsourcing options**

If the customer has the financial bandwidth, try suggesting they work with additional service providers, such as a VA or freelance marketing coordinator who could complete the small tasks you ask of them.

# The Disappearing Customer

You're not really sure why this customer took on your services. The money (or part of it) is coming through, but they aren't really showing an interest in the project and/or interacting with you.

These customers are dangerous in nature because one day they will wake up and notice that they signed a contract and possibly paid you money but didn't get anything in return. And it won't matter that you tried to email them 50 times or called them 100 more.

You need to catch their attention and understand the reasons behind their disappearance.

**Important Note:** Due to the current world situation with COVID-19, unexpected health issues, family and caregiver dependencies may affect your customers' availability and/ or response times. Please be empathetic and sensitive to these issues and consider that your customer hasn't "disappeared" but is dealing with more urgent personal matters that may prevent them from responding to you.



## **Investigate the current situation**

Make sure the customer is still relevant. If they have a business, are they still active or maybe had to close down? Did they move States or Countries? Understanding if there are larger factors at play will help you determine next steps for moving forward.

More tips →

# The Disappearing Customer



**Return to the roots of the relationship.** Is your point of contact the same person who signed the contract?

- If not, reach out to the decision maker and ask for their advice on how to progress with the project. These situations are delicate, so it's important to word your email in a way that doesn't hurt your point of contact, since you will mostly likely need to work with them later on.
- If so, how did this customer originally contact you? Try contacting them in the same manner, and if they still don't answer, try: LinkedIn, Facebook, Instagram, Twitter... anywhere they are active. You would be amazed at how many people I got to respond once they understood that I would use any platform to get their attention.



**Send an email** explaining the terms of your contract, the timelines that are being affected and the work that still needs to be done. Try not to overwhelm your customer but rather excite them and remind them why they saw the need originally to take on your services.



**If all else fails**, send one last email with a catchy subject line that communicates very clearly why you have been trying to reach them and that if you do not receive an answer within X amount of days, you will see their contract as being forfeited and any sums paid will be kept by you. Disclosure: this may need to be a more formal letter, so please discuss with your attorney.

# In summary...

I hope you found this guide helpful and that you were able to gain new perspectives on how to approach and work with the different types of customers that you currently have in your portfolio (or will in the future).

Remember that you were hired because you hold expertise that your customers need. Don't be afraid to politely disagree and/or push back on the demands of your customers. There may be aspects that they are missing or overlooking that can make them successful in what they are trying to achieve. Believe in yourself and what you offer!

To learn more about managing your work with your customers, setting expectations, handling crisis situations and so much more! Please visit [www.thecustomercompass.com](http://www.thecustomercompass.com) or email me directly at [hello@thecustomercompass.com](mailto:hello@thecustomercompass.com).

Looking forward to hearing from you soon!

*Hadas*

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