

Data Made Easy

Your Essential Playbook for
Capturing Customer Info

By the Cinch Customer Success Team



Hi there!

Welcome to your go-to guide for capturing customer information effortlessly and effectively. Collecting emails and phone numbers isn't just another task; it's the key to stronger customer connections, better service reminders, and more repeat business. We're here to help you turn this into a seamless part of your day-to-day operations.

Here's how you can make it happen, step by step.

01 Make Data Collection Part of Your Team's Routine

Your team plays a huge role in gathering customer information, and it's important they know why it's so valuable. Gathering emails and phone numbers helps with things like:

- **Building Customer Loyalty:** Personalized reminders and special offers make customers feel valued.
- **Boosting Revenue:** With regular follow-ups, you'll keep people coming back for more.
- **Job Security for the Team:** Higher sales mean a healthier business, which benefits everyone.



Talk about this in a team meeting and make data collection routine. Remind everyone that missing an email is like missing an opportunity for future business!

Keep It Fun with Incentives

No one can resist a little friendly competition or a reward for a job well done. Here are a few ideas to get everyone motivated:

- **Team Leaderboard:** Track who's collecting the most emails and phone numbers. Have some fun with it!
- **Bonuses to Aim For:** 70% capture rate → \$50
80% capture rate → \$100
90%+ capture rate → \$200
- **Small Wins, Big Smiles:** Hand out raffle tickets for weekly prize drawings whenever someone gets a successful email capture.
- **Celebrate Success:** Call out your top performers in team meetings or slap their names on a recognition board. Everybody loves a shoutout!

02 Make It Easy with QR Codes

QR codes are a game-changer! They make it effortless for your customers to sign up, and they work almost anywhere. Here's where to put them for maximum impact:

- **At the Front Desk and Waiting Area:** Have QR codes front and center in the lobby and on the checkout counter.
- **Receipts or Cards:** Add handouts with QR codes to bills or service receipts so customers can sign up at their convenience.

The quicker and simpler the form, the better. Ask for just the basics:

- Name
- Email
- Phone Number

Include a simple checkbox for customers to agree to receive offers and reminders. Bonus? Everyone who signs up can get a \$10 discount or possibly a free product or service.

03 Try High-Touch SMS Opt-In Campaigns

Here's the good news. You probably already have plenty of phone numbers collected. Now, you can use them to send out friendly SMS campaigns that encourage people to opt-in for emails and updates. Our recommended approach is simple but super effective.

1	<i>Right After Their Visit</i>	→	Thank you for stopping by! Opt in to receive special discounts and leave us a Google review. Here's the link: [Google Review Link].
2	<i>Three Days Later - Check-In</i>	→	Hi there! Stay in the loop on exclusive offers and free reminders. Tap here to opt-in today: [Opt-in Link].
3	<i>7-10 Days Later - Follow-Up</i>	→	Reminder! Don't miss out on updates and reminders. Opt-in here now: [Opt-in Link].
4	<i>After Their Next Visit - Sweeten the Deal</i>	→	Thanks for choosing us! Enjoy \$15 off your next visit when you opt into our exclusive updates here: [Opt-in Link].

04 Automate with Cinch

We get it. There's only so much time in a day and chasing after opt-ins manually isn't always realistic. Luckily, Cinch has you covered with tools that make it easy to keep your customer communications running on autopilot. Here's how Cinch can help:

- **Smart Segments:** Use our Segment Builder to figure out who hasn't opted in yet and send them a little nudge.
- **Automated Follow-Ups:** Set up workflows through Cinch Customer Journeys to send emails and texts automatically after a customer visit.
- **Ad Retargeting Made Easy:** With Cinch, upload customer lists to Google or Facebook and run targeted ads to encourage opt-ins and service reminders.



These tools do the hard work for you, freeing you up to focus on providing excellent service.

Quick Recap

To make capturing customer data a smooth part of your process, remember these key tips from your Cinch Customer Success Team:

- **Empower Your Team:** Train, motivate, and reward employees for collecting customer information.
- **Make it Easy for Customers:** QR codes and short, simple forms remove all the roadblocks.
- **Use SMS the Right Way:** Send friendly, value-packed messages that encourage sign-ups.
- **Put Cinch to Work:** Automate your communications to save time and stay consistent.



We're here to help you every step of the way. Start trying out these tips today and watch your relationships with customers (and your bottom line) grow.