



How to Build a VIP Client Loyalty Program That Drives Referrals and Repeat Business

Most aging-in-place professionals and other business owners too, spend time chasing new clients, but overlook the goldmine they already have. In this session, you'll learn how to build a simple, sustainable VIP loyalty program that keeps you top of mind, deepens trust, and naturally generates more referrals and repeat business.

You're Sitting on a Growth Goldmine

Did you know? Acquiring a new customer costs 5 to 7 times more than retaining an existing one.

The related ideas that often get bundled with this are:

- Existing customers are more likely to buy again and spend more per transaction.
- The probability of selling to an existing customer is around 60–70%, versus only 5–20% for a new prospect.
- Even a small increase in customer retention (like 5%) can significantly boost profits, sometimes cited as 25–95%, from a [Harvard Business School study by Reichheld and Sasser](#).

Let me ask you this...

"When was the last time you reached out to a past client?"

If you're like most aging-in-place pros, it's been a while. Not because you don't care, but because no system exists to make it easy.

What's Actually Happening

→ Clients forget you

Even clients who loved your work lose touch over time without follow-up.

→ Referrals slip away

Every week without contact is a missed opportunity for a warm introduction.

→ Relationships fade

Trust that took months to build quietly erodes without nurturing.

The Mindset Shift That Changes Everything

Old Thinking

"I provided a service. My job is done. If they need me again, they'll call."

New Thinking

"I'm a long-term resource and trusted guide. My job is to stay present, even between appointments."

i Stop thinking **"one time transaction"** → Start thinking **"relationship over time."**
This single shift is the foundation of every referral you'll ever earn.



Why a VIP Program Matters

Your Industry Runs on Trust, Timing, and Relationships

Aging-in-place decisions are deeply emotional and rarely happen on a predictable schedule. Families often don't need you, until suddenly, urgently, they do. Humans are naturally reactive vs. proactive.



Emotionally Driven

These decisions follow a fall, a diagnosis, or a scary moment, not a calendar. Families are overwhelmed and reach for whoever feels most familiar.



Delayed Decisions

Clients may go months or years without needing you, then need you immediately. A VIP program keeps you top of mind during the quiet periods.



Referrals Are Relationship-Based

Families refer the professionals they remember and trust. Consistent, caring contact ensures that professional is you, not a competitor.

A past client calls you 2 years after her mother's home modification, her neighbor just had a fall. Who does she call? The person who stayed in touch.

The Simple VIP Framework

Introducing the C.A.R.E. System

You don't need complicated software or a big budget. You need four consistent behaviors, built into a simple system you can actually stick with.

C

Consistent Contact

Monthly or quarterly touchpoints that keep you visible and relevant, even when clients don't need you right now. The key? Show up to *teach*, not to sell. Every touchpoint should leave them thinking, "*I learned something useful today*", not "*they want my money*."

A

Added Value

Give without asking. Share helpful tips, guides, and resources that make their lives easier and establish you as the expert they trust. When you lead with education, selling becomes almost unnecessary, clients come to you already convinced.

R

Recognition

Make clients feel remembered. Birthday notes, service anniversaries, and "*thinking of you*" messages create emotional connection that drives loyalty. These moments aren't about business at all, and that's exactly the point. Use the fun holidays like the ones at funseniorholidays.com.

E

Easy Referrals

Make it simple for happy clients to spread the word. Give them the language, so they never have to think about how to introduce you. Clients who've been educated, not sold to, refer with genuine enthusiasm, because they're sharing someone they actually trust.

Breaking Down the C.A.R.E. System

What Each Step Actually Looks Like



Consistent Contact

A short email, a helpful seasonal tip, or a quick safety reminder. **"Just checking in"** messages go further than you think, they signal that you care beyond the invoice.



Added Value

Share a fall prevention checklist, a **"What to watch for this winter"** guide, or a local resource list. You stay relevant even when clients don't need a paid service right now.



Recognition

A birthday card. A note on the anniversary of their home modification. A simple **"Thinking of you"** message. People refer people who make them feel *seen*.



Easy Referrals

Don't ask awkwardly. Instead, give them language: *"If you know someone who's starting to worry about a parent's safety at home, I'm always happy to help."* Simple. Natural. Effective.

What to Actually Include

Your VIP Program, Month by Month

Keep it simple, or you won't do it. Here's a practical structure that takes less than an hour a month and delivers real results over time.

1

Monthly (or Quarterly) Email

One useful tip. One timely reminder. One short story or client success. That's it, keep it under 200 words and it will get read.

2

Quarterly Personal Touch

A handwritten card, a quick phone call, or a personal text. This is what separates you from every other service provider in their inbox.

3

Annual Check-In

A simple, warm outreach: *"How are things going at home? Anything changed that I should know about?"* This one question re-opens conversations and surfaces new opportunities.



Do This Right Now

Write down the names of **10 past clients** you could reconnect with this month. Don't overthink it, just write the names.

Real-World Win

An OT sent a simple **"Winter Fall Safety"** email to her past clients. Within one week, she received **2 warm referrals** from families who forwarded her email to friends.



You don't need 100 people. You need consistency with a few.

Common Mistakes to Avoid

What Breaks a VIP Program Before It Starts

Mistake 1: Overcomplicating It

Fancy CRMs and automated workflows sound great, but if they're hard to maintain, they don't get done. A simple spreadsheet and a calendar reminder beats a complex system you abandon in week two.

Mistake 2: Only Reaching Out When You Need Something

If every message is a sales pitch, clients feel used, not valued. The goal is to give value consistently, so that when they DO need you, you're the only person they consider.

Mistake 3: Forgetting to Remind People What You Do

People don't refer what they can't clearly explain. Every touchpoint is a gentle opportunity to remind your network who you help and how, so they can describe you to others with confidence.

Mistake 4: Inconsistency

"Out of sight, out of mind" is brutally true in this industry. One email every six months won't build trust. A steady, predictable presence, even quarterly, makes all the difference.

Putting It All Together in 5 Steps



Choose Your Audience

Start with past clients, referral sources, or both. Pick a focused list of 10 people, not 100.



Pick Your Frequency

Monthly if you can, quarterly at minimum. Commit to one cadence and protect it like a client appointment.



Decide Your 3 Content Types

Choose a **Tip**, a **Story**, and a **Reminder** for each outreach. Rotate them so your messages stay fresh and useful.



Create a Simple Calendar

Block time on your calendar for outreach, even 30 minutes a month. What gets scheduled gets done.



Start With Just 10 People

Don't wait for a perfect system. Reach out to 10 people this week. That's your VIP program, it's already running.

Your Takeaway

Your Best Marketing Is Already in Your Contact List



Consistency beats complexity

A simple system you stick with outperforms an elaborate one you abandon. Start small and build the habit.



Small touches create long-term trust

A birthday card. A seasonal tip. A quick check-in. These moments compound over time into an unshakeable reputation.



Your existing relationships are your goldmine


The clients who already know and trust you are your most powerful referral source, they just need a reason to remember you.

Think of It This Way

Your VIP program is like watering a plant. You don't water it once and expect it to grow forever. You show up consistently, and over time, it flourishes.

Your One Action This Week

Reach out to **just one past client** before Friday. A short email, a card, a text. You don't need a perfect system.

 You just need to **begin**.