



Charl Coetzee

James: James Schramko here. Welcome back to my podcast, James Schramko.com. This is episode 993. We've got Charl Coetzee back. Hey, Charl. Good to hear from you.

Charl: Hey, James, great to see you again. Love the shirt.

James: Thanks. Yeah. A bit of a story behind the shirt. Well, I like my Lululemon stuff, right, and I got switched on to that brand by a client of mine, Betty Rocker. She's like a fitness health guru in America. And she had this fantastic hoodie on some time I was talking to her on, back then, it was Skype. I said, I love that hoodie. Like, I love my hoodies. She goes, Yeah, it's Lululemon. You'd love this stuff. So I went to Lululemon.

Anyway, I really like this stuff. I talk about it quite a lot on the show, and I'm still waiting for my merch to be sent from them. One day, a fan or a listener is going to connect them to me and say, This guy just keeps talking about you.

The shirt that backfired

Anyway, I was in their store, and I found this shirt. And I thought, this shirt would be great when there is a cyclone swell. Because when the big waves come, and it gets pretty crowded around the points here at Noosa, there's a lot of people out there with photography and videography. And I thought it'd be pretty good to, you know, when someone takes pictures and puts them on Facebook, I'd like to find myself in that picture. So I'll wear the yellow shirt.

And the first cyclone came, I went out there, I went with our friend, John Lint, from Kleq, he was staying with me, this was one year ago. And I said, Mate, I'll be so easy to find. I'm the guy in the yellow shirt. How many people do you think had a yellow shirt out there that day? There was at least a dozen. I couldn't believe it, like how many people out here in the yellow - they've all had the same idea.

I'll wear the high vis shirt so that I can be - I think maybe some people also did it so they don't get run over. Because you know, drop ins, Oh, sorry, mate, I didn't see you. They can't say that if you're wearing a high vis shirt. So I don't normally wear it on my podcast, but I'm feeling a little bit high energy today. And also, there may have been an incident with a four-year-old and some butter on the other shirt that I was wearing, fairly recently.

So anyway, that's how it is, I'm actually a normal human and life happens.

What Charl brings to this discussion

So the reason I got you on, we want to talk about the idea of customer retention and break it down into steps over the customer journey. I like talking to you, Charl, because since I met you at Ryan Levesque's event, a high-level mastermind, you were paying him lots of money to learn at a high level, and we had people like Dan Martell in the room, and I came and spoke there as well, I knew you had a really good understanding of the marketing, but also the tech.

I know you're one of the world's first customers and affiliated service provider for Kleq, which is my preferred platform. So I've been making referrals to you for some of my clients who I want to get them looked after properly, because people say, Oh, is there a service provider who can just do the Kleq stuff for me. I know it's easy to use and everything else. But you've taught me to have a team or to hire a service provider, like don't get too bogged down. And I say, Oh, absolutely. I think Charl is the guy.

And I've sent them over, and you're just doing all your magic in the background. And you can integrate with other suppliers, which is great. Or you can handle most of it yourself, which is even better.

But in that, I want you to talk about from the perspective of the typical person listening to this podcast, already has an online business, probably has a couple of products or more for sale, may have a small team, is trying to do that balancing act between traffic, conversions, content delivery, etc.

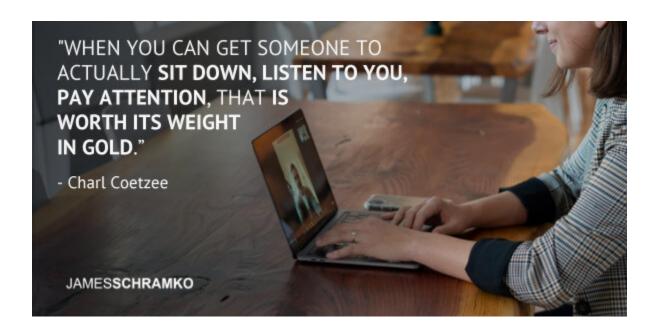
If we could break it down into the steps that you've seen as you approach it with a whiteboard, I mean, when you brief a client, you say, Okay, tell me what you got. What are you doing? Now you use this process to map out what has to happen next and what to build. And I'd love you to share that today.

Charl: Yeah, no, totally. Well, thanks for the warm intro. And yeah, it's great to connect with you again. And one thing I really value in this digital space of ours is when you actually have relationships that you've met people in real life and also that goes back a couple of years. You know, that's really amazing.

So we met in Austin, I spent some time with John in Bangkok and as well as Puerto Rico. So it's just nice to meet in person. It's like the difference between a dial-up connection and like, high-speed broadband. That's the way I liken it. So awesome to be speaking again with you today. Yeah.

Well funny thing is I think your shirt is actually a great talking point because, you know, in today's day and age, so many people are pivoting, right, looking for a way is what I call this the wisdom economy.

Like, you can package your knowledge, experience, expertise, and services, and actually sell that and make a living out of that. And it's totally possible.



You coach a lot of people, some of the most successful people around. So we've seen all firsthand experiences, but as things kind of grow, it becomes more and more crowded, so the question is, how do you stand out to actually get someone to pay attention to you? And not just pay attention, but how do you take that attention, which is really the new oil, so to speak, in our current day economy? Because when you can get someone to actually sit down, listen to you, pay attention, that is worth its weight in gold. But only if you have a complete model for that.

So I always thought to myself, well, what would those four big steps be? If those are like your big stepping stones, you want to go from the one side of the river to the other side, what would that be? And it's actually quite simple. For the four phases, the way I look at it is awareness, consideration, conversion, and retention.

Stepping stone 1: Awareness - getting noticed

So if we were to break those down, awareness, that's our story in the beginning is like, how do people notice you? You've got an awesome yellow shirt. But if a bunch of other people have a yellow shirt, well, then it becomes a little bit more tricky, right?

James: Exactly, it becomes commoditized. And now you're just one of the many people in the yellow shirt.

Charl: Exactly.

James: Like a black wetsuit and a white surfboard in San Diego, one of a thousand.

Charl: Exactly. That's so true. And the fact of it is, that's kind of what the internet space is like, how do we stand out these days?

James: I reckon you just throw on a South African accent to start with, grow a bit of a beard, and wear a trucker cap, and you've got your thing? [laughs]

Charl: Totally, yeah. [laughs] That is definitely a point of differentiation. So the accent definitely gets a lot of attention, and people often joke with me, they say, If I lived in America, I'd be an African American, because I'm from Africa, but living in America. Well, I guess Elon Musk is an African American, for that matter. [laughs]

James: There you go.

Charl: Yeah. So it just comes down to that awareness at the end of the day, because you need to get people to pay attention. So that can happen in the old days, back in the day, you throw up Google AdWords, and you'd get a click, and you can immediately send them to your page and they'd buy your stuff.

Over time, traffic has become a bit more tricky. Obviously, you know, we all know Facebook, and you know, the way that you kind of have to jump through hoops, they're removing targeting options. So traffic is becoming harder and harder. But there's still a way to make it work in order to get that awareness, that attention.

And one thing that you see often if you look at some big YouTubers, millions of subscribers, great content, but they don't quite have the business model to actually turn that attention and that awareness into a proper business. Yes, they get ad revenue, they get brand deals and those kind of things. But you don't own the racecourse, to use your language.

And so I want to look at once we have that critical mass, or at least just some attention, you know, once people can find you, where do you send them? So that's job one, is you need to get your traffic source. Either you're going to pay for traffic, or you're going to do some content marketing, you look at someone like yourself, this is going to be Episode 993, how many people were able to sustain the podcast for that duration of time?

James: We'll find out. I've asked people listening to submit an audio or a video if they have been listening for the whole time, and to share their sort of memories, or highlights, or any thoughts, or reflection. There are a couple of people, I think I've counted about five, who say they've listened to every episode. I have to commend them. I've been there for all the episodes, and it's a pretty long run.

Charl: Yeah, well, that needs to be celebrated. Because if you just pick a niche, and you can show up and you can deliver value, and you can be yourself, because the James Schramko can't be commoditized, there's only one James Schramko.

James: Yeah, which is a big reason I went to my personal brand. And I think just to sort of leverage on what you were saying before, you've got the influencers, and the YouTubers, and the famous creatives who get a lot of attention, but then they don't know how to actually monetize it. So they have a lot of noise, but not a lot of signal when it comes to the monetization.

Then you got people like me, who came to it from the complete other end of the spectrum. I've got the thing to sell, but no one knows I exist. Right? I'm on the other bank of the river to them. But we're both on the other side of the river to where we want to be, we need to be able to join it. And so, whichever side of the river you're starting on, this is very important.

If you've already got the thing to sell, you need to know how to get the attention, and if you don't know what to sell, but you've already got the attention, you need to know how to move it. So this bridge, so to speak, will be a really interesting thing to piece together.

Charl: Yeah, no, you're so right. And I think one way to kind of make it a bit more visual for people, if you think of that first stepping stone, which is awareness and attention, if we do have a graphic, just think of eyeballs. Your goal with that stage is to get eyeballs. You can either buy them or you can create content, you do a podcast, you write a book, whatever it is that you do in terms of value, that's your starting point. So eyeballs is the goal.

Now once you've gotten those eyeballs, our next graphic if you want to have in our mind is a little envelope, which is emails. To your language, own the racecourse. So once you've gotten all this attention of people that can see what you're about, what you stand for, what you can help them with, how you can articulate their problems, and they connect with you, right? Like we connected when we talked surfing in Austin, right?

So that's very important to connect with that initial connection, awareness. But once that is there, how do you stay in touch with those people? Number one, on a platform that you own? And that's where Kleq enters the party, because now you have opt-in pages that someone can go to and sign up to your mailing list, or for a lead magnet, or for whatever the case may be. But there's additional values that we can deepen this conversation.

Stepping stone 2: Consideration - deepening connection

So your goal for the consideration part is, when someone says, Well, I dig this guy, I like his book, I like his podcast, I like his YouTube channel, I'd like to get more, right, we all know when you have that feeling that when you caught your first open face wave, you're hooked, you want more, right, and that feeling, you kind of want to get a similar thing with your customers.

So now once you've gotten that email, Kleq makes it super easy for you. You can not only capture the emails, but you can tag people accordingly, like this person came from a video about traffic, or that person came from a video about content creation. So you can also be smart with adding some segmentation to the way that you capture emails, even as a quiz functionality built in, all those kind of cool things.

So now you've built your list, you've captured their attention to the next phase. So now what happens? Well, you've got to deepen that connection via email. And that's really just messaging, right? You've got this email address. Now, how do you keep delivering on your value? And that is kind of the marketing. And like Peter Drucker said, the aim of marketing is to make selling superfluous.

And if you can market to people and show them how you can help them by actually helping them, number one, show them that you understand their problems and so forth, they're going to keep paying more attention. You're going to pull them in, which then takes you to that third step, which is conversion.

Stepping stone 3: Conversion - value for money

This icon here will be your dollar sign, that's where we're going to exchange the value that I create for monetary value that you pay for that. And the value has to be lopsided in your customer, they've got to be feeling, man, I'd be a fool not to pay \$100 for this training that's going to help me get that outcome and solve that problem. Or I'd be a fool not to join this mastermind for X dollars, because I'm going to get way more value out of that.

But in that case, we need to understand two things. What do you offer? So what do you sell them? And then how do you sell it? So obviously, the how is, you can have a sales page, you can have a webinar, you can have a challenge, you know, any of these funnels. But at its core, that is where the automation gets leveraged again. So with Kleq, if you're going to run a challenge, you can build all of your pages. Man, I love that one click where you just click a button...

James: The campaign builder?

Charl: Yeah.

James: Brilliant. Yeah, you just decide what do you want to have made, and you just click on it. It builds it. And the difference between that and a lot of the other page builders is that it actually already links the pages correctly. And you can pre fill it with sort of a template that you just type over. And that's a great starting point.

It's like a lot of people are still on their starting point with the first iteration of their business and doing just fine. Later on, if you want, and this is where the customization is good, this is the yellow T-shirt part, a lot of course creators, they're just using all the same platform, right? They're all using, I won't even name them, but there are platforms where you can go and load your course up. But every single customer is getting exactly the same usability, and experience, and colors, and layouts, and fonts.

You can heavily customize with Kleq. So you can now turn it into your own version. I know that's where you have been specializing in taking someone's bog standard installation and then making it, like, doing the design or working in with their design, or their color palette, or brand guidelines, and making it special, which is also what we do with my own membership.

My team has done exactly what sort of stuff that your business does. And that's customize the look and feel, and the way that we want it laid out, and the way that we want people to use the membership. I'm so glad it does that because already, I think we're up to about six or seven months of the changeover for my membership. And I've already moved a couple of things around, some subtle changes.

I've asked for a few extra features, to be able to do the things that I need it to be able to do to get the results for my members. And a lot of them are just boxes. Like one of the best ones ever is the one where if your customers don't log in, you can say, Hey, after this many days, add this tag to somebody, and they'll start off on a sequence, which in my case is a follow-up sequence.

I'm like, Hey, I'm looking for my lost customer, right? Have you seen them somewhere? Like, is everything okay? And bring people back. And that one feature, that really helps probably as step number four, which we'll talk about in a minute.

Charl: Yeah, no, totally, you're so right. So because the first sale that you're going to make is not really money.

The first sale is also not the email, the first sale is to pay attention. So you've got to sell someone, why should I give you my time? Then, why should I give you my email address so that you can, you know, stay in touch?



Only then the third phase is money. But that's still not the last sale, the last sale that you have to make is retention.

Stepping stone 4: Retention - getting people to stay

And that's one of the things I love about you, James. Being around for so long, you're one of those marketers, number one, you've been around, you get high praise from all the big guys out there. And you believe in integrity, and you want to deliver the transformation. That's why you've requested that feature, right? Because you want people, once they've bought, to be able to experience the transformation that your marketing and sales process promised.

James: Yeah, that's why I send an email every week to members to say, Hey, this is what you know, because I want them to use the thing they've bought, I don't want to hide and wait until they change credit card to discover what they've been paying for. This is an actual strategy of some membership owners, is pray that the customer doesn't remember this subscription. Right? And that doesn't sit well with my values. I want people to get great results. And I want them to feel good about it.

I like this saying that I've thought about, I think I heard it somewhere else. And I'm not sure where, but it was that retention is a function of relationship and results. And I really like that concept because I want the relationship, I want to have a great relationship with the people I'm working with. That's what fulfills me.

And if they get a result, that's really the yes or no answer as to whether I've done a good job or not. They get a result. Yes. They didn't get a result. No. And so I'll take that responsibility. And I want people who invest in me - or let's say, I want people who invest in themselves via me to get the result that they've invested in. That's very important to me. And so the retention is really the critical factor if you have any kind of membership.

But I will address this, there are people who sell one-time things, and they think, well, how could I possibly have retention? Like a flower shop, or someone selling guitar lessons or whatever, they might think, well, they've already bought my thing, I'll just give them lifetime access. And I'm not sure what else I could sell.

But there are certainly ways that you can build in repeat sales to those sort of businesses. Some things you don't realize could be on subscription actually can. Certainly anything in a moving market, or anything where it expires, like flowers, for example. Some people might like flowers delivered every single month.

I get coffee delivered every single month on a subscription, which normally I would have just purchased one at a time if I'm at a coffee shop. You can't get good coffee in the supermarket, or you couldn't until now, but those subscriptions just automatically happen, and they make your life just amazing when they work.

Is retention only for subscription businesses?

So what would you say to that point about step number four? Is it only for subscription memberships? Or do you see other angles as well?

Charl: No, I definitely see other angles as well. Obviously, number one, if you can do subscription, do it because now you can have a longer path that you can work with someone, which means you can deliver a bigger result. And that's why I love what you say, retention is relationship and results. So totally, that's obvious.

But if you only sell one-time things, first of all, once you have these customers, make sure that they get their result. And then you need to have an email in your sequence, number one, like you say, consume the stuff but once they've done it, your goal should be get the testimonial for two reasons.

Reason number one, to actually do a checkmark and be able to sleep well at night knowing that you receive money in greater value than what you've delivered, transformation. That's great feeling, number one. But number two, those testimonials now actually go back into the previous step, your conversion step, so then you actually don't have to be so salesy. You can just say, like John Carlton, our mutual friend, Here's what I've got, here's what it'll will do for you, here's what you've got to do next.

And you can just say, Well, don't take my word for it. Look at all these other people, what results have they received. So number one, if you never want to sell anything else, those testimonials will help you to get more sales, and it will make you feel good about your model that you're delivering results.

James: I guess you could also charge more or sell to people who pay for bigger solutions?

Charl: Yeah. I always think of like, do it yourself, done with you, and done for you. So that doesn't always work in those markets in all markets. But a do it yourself, you just buy a course, you go through it in your own time. A done with you can be a consultation coaching type of thing where we can do it together. And a done for you is we are just doing everything for you.

Now obviously, those prices can go from \$100 to \$1,000 to \$10,000. So there's an exponential growth in a way, more that you can charge. So that's one thing, you can increase your prices, which allows you as a business owner more leverage to deliver a result. And at the same time, if you have customers, ask them what else they need help with. Because now you can go ahead and make products based on they told you, Well, I love this result, you really helped me get great copy, if you can help me for my sales funnel, can you maybe help me to use the same copy but on traffic or whatever?

So you can see what else they are, number one, so that you can maybe create a product, or if you have another service provider, or a course creator, whatever, that you use the products yourself, you can go ahead and promote that, right? Like we use Kleq, we promote it for our clients, if someone buys it through our link, we get some money out of that.

So I now know, I can, with full confidence, recommend that to somebody. So they get value ongoing. The Kleq owner, as you know, gets value and money and we get a commission on the back end.

James: You know, I feel a lot more comfortable with a recurring subscription software than when I pay a small fee one time, I'm very skeptical that they'll support it, that they'll stay around. So I know that that's how it works. And I'm okay with that. Because almost anything useful, you know, like a phone subscription or an internet thing that I plan on continuing to use, they're going to keep getting paid.

Also I need to know this, this is very important. I'm asking this on behalf of my team. What is the icon we want for step number four? What's the visual icon?

Charl: Yeah, there's actually two visual icons. So visual icon number one is just like a smiley face with the hearts as eyes, right? Your customer's happy, they got the result. And then that \$1 sign becomes \$2 signs, right? So now you can actually go ahead and just, that's how you build a business.

James: Because I know they'll will be wondering, how am I going to illustrate this? I haven't got the icons. So I'm sure they're going to very lovingly edit this video up on, you know, we put it on YouTube and on our site at episode 993, with the icons, and we'll do a little transcription as well.

For the Kleq user wanting help...

Also, I need to know, Charl, if someone was listening to this, and they think, oh, this guy knows what he's talking about, and I use Kleq and I feel like it'd be great to have someone do some stuff for me, where do they get in touch with you?

Charl: Yeah, no, we'd love to chat with those folks. So there's two ways that you can go and get in touch with us. You can go to JBayStudios, which is short for Jeffrey's Bay, jbaystudios.com. That's our current site, you can get in touch with us there. And then we are actually creating a new site where we're going to demo all the glory that Kleq can provide for you and show you, and also give some training to show you actually, how do you do all these things.

So you know, if you just want to go and learn about that, and then apply them to Kleq, you can do that. So we're making a new brand for that with my partner, which is called bringcashandcoffee.com, which is a little fun brand, just bringcashandcoffee.com. And then that's where you can go ahead and just get all these things taken care of and really build a business that you know, you can sleep well at night, that you're making an impact in people's lives. You're helping folks out.

And ultimately, we're going to look at those four steps. But then that thing that makes you stand out is that building a brand around that throughout all the steps, and that you've got automation, and you've got all the four customer journey steps, but you're building a brand, and that's why I love that you went to James Schramko as your brand. Even SuperFastResults spoke about your value of getting people results.

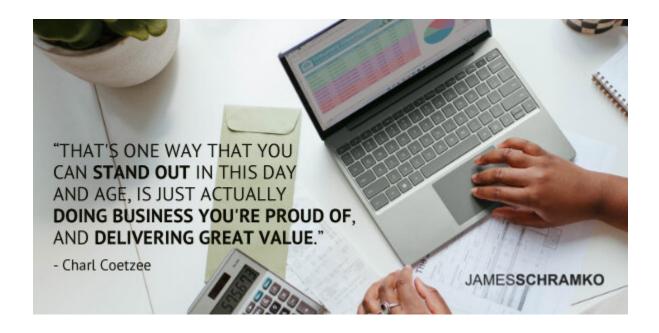
But now when you say James Schramko, and I see your podcast logo, the microphone, the surfboard, and the waves, it makes it easier to connect, because your brand has a voice, which is both visual and verbal. So we're looking at all these kinds of things. That is how you build a business that will last, a business that makes an impact.

What gives, Facebook?

James: And mostly hard to replace, except for these bandits on Facebook that keep stealing my pictures and setting up as my name, and then contacting my customers, sending them private messages with special gifts and offers and bitcoins and stuff. I'll never do that. Right? If you're listening to this, and you got an email from someone that looks like me, that's not me. And you can see they've got zero posts. They started in January 2023.

I have reported this account five times. I've asked anyone who tells me about these messages to report it. Yet Facebook have still left it up, now it's going on for seven weeks, and I can see their latest activity like minutes ago, hours ago. So what gives, Facebook, Meta? Get on it. That's outrageous.

But, you know, if you slap our account and stop us running ads with no reason, and then we go and set up another account, you shut it down before we finish the last digit of our credit cards. It seems like, Oh, but coincidentally, you can pay a subscription now and get a blue check and not get cloned.



Charl: Yeah, I think that's the one, it's worth paying that because we have another client that we do like social media stuff for and they run giveaways, then these guys create fake accounts with like, one letter misspelling. And they tell people, you want, you've just got to pay, yeah. So we'd happily pay that money just to avoid that sort of reporting all those people. But you know what, that's one way that you can stand out in this day and age, is just actually doing business you're proud of, and delivering great value. No one else can copy you.

Knowing your customers, playing the long game

James: Well the thing that stood out for me is I actually know most of my customers. I send an email offering my clients a free session with one of my partners who's doing some research right now and will actually listen to them. They'll tell him the problem, and he'll give them a solution. And I sent the email out and his calendar just got booked out, like, brrrr, like booked out. And he said, Right, I've got these calls coming up, can you give me some background to help me help them better? And I know all the names. I know all of them.

I know where they live, I know what they do, I know what their business is, I've dealt with them for years. And I love that level of relationship. So I think if people were less obsessed with step number one, and trying to get vanity metrics, and more focused on step number four, which is where I've always been focused, I really measure everything by retention, like how long, and I have had customers for 12 years. I could always improve number one, that's true. I've just had somebody join my program, who saw me speak 14 years ago.

Charl: Wow!

James: How's that?

Charl: Yeah, that's good.

James: I spoke at an event. He was on the sound desk. And there was two people on the sound desk, one person joined and has been in my program for about eight or nine years. So he took a couple of years to join, his wife or partner joined. And he's in a high-level program of mine. But the other sound desk guy has finally just said, Okay, yeah, I'm in. Fourteen years is my record.

Charl: Yeah, that's amazing.

James: So play the long game. That's a big lesson there. All that says to me, is maybe I could market a bit better, like Peter Drucker said, we should do better marking. So I've changed it to my personal brand. I'm putting myself out there more on the socials. I'll absolutely use those social platforms to let people know I exist, and to share education, and to hopefully get them a result in advance of even payment.

If you listen to enough of my podcasts, you'll get a result somewhere. You listen to Charl, do what he says, go and map out your four steps. He said it there, what is it, eyeballs, it's email symbols, it's dollar signs, and then it's happy customers with a heart and double dollar signs. Is that right?

Charl: That's right, pretty much. Exactly.

Pushing a great product forward

James: So you just do that. And you've got the system. You do it on a good platform that's supported. I tell you what I do like, Charl, is that we have power users now. We've got me on the platform, we've got some of my heavy hitting clients, we've got you've been on that platform for way longer than all of us, and your clients, and as a developer, as well, when you and I find things that people need, and then we ask for it and it gets done, that's what pushes this program forward.



Just a few solid users who have a great relationship can move the product forward faster than catering to the masses. And it should be worth saying, this product that we're talking about, Kleq, it's not designed for the masses. There's plenty of programs out there for the masses. This is the Mercedes-Benz product in the market, the high quality, does a good job, and it's got all the things you need.

So I'm glad that you're supporting it. I appreciate it. I hope your new website goes well. We'll put links to it in Episode 993. Also, I'd be interested if you want to come back and share some more insights that you've learned along, you know, working with clients, where you've already described the first one.

So now I know if a client comes to you, you're going to say, Okay, well tell me about how you get customers. Tell me about how once they find out about you, how do you communicate with them? Then tell me about what you're selling with these people, and then tell me how you're nurturing and growing that sale into a future sale and extra sale or additional sale.

Are you catching testimonials? Are you building an email database? Are your funnels streamlined? Show me your in-funnel analytics, which obviously the platform can do. Show me what's coming in the front door and how it progresses through to the different products. Do you have automations in place to capture people who don't log in anymore? Because it's all able to do that.

Do you ask people to refer people for, you know, an extra bonus download? Because it can do that. Do you split test two different offers? Because it can do that. Do you use the app function so that people can use your site on the phone? Because it can do that as well. I mean, hiring people who know how the platform can work, in the best case scenario, is the fast track to success. So thank you for everything you're doing, Charl.

Charl: No, that's awesome, James. Thanks so much for having me. And yeah, I love talking about this stuff and even more doing this stuff, because when you see the results, not just your Stripe notifications, or PayPal notifications, but getting heartfelt testimonials from people, man that feels good. Because ultimately, we know that if you keep doing good, you're going to be rewarded for that. And that ultimately, like you said, the long game, that's how you're going to build a brand. And that's how you're going to build something that people cannot copy, because they can't copy that process and that attention to detail, and the fact that you care about your market.

So I love that you represent all those values. And yeah, thanks so much for having me, and I look forward to coming back and chatting about more of these awesome things and building a brand, building a business, and really just making a difference, and making waves. Let's call it like that.

James: Love it. Great way to end. Thanks, Charl.

Charl: Awesome. Cheers, James. Bye, guys.

