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CONSULTING

CREATING A “YES” CUSTOMER JOURNEY

Create and integrate marketing and customer service strategies, so you can always say yes to your customers (instead of wishing you could say no).





Hi there,

People see countless emails, ads, social media posts, and other marketing pieces every day, making it challenging for you to get noticed and establish and maintain relationships with people.

To grow, you must continuously review and improve your customer journey — from the moment they see your brand to post-purchase follow up — through their eyes.

People are also savvier and more likely to move on to a competitor if you say no to them — even to the smallest request. This means that marketing and customer service need to be more integrated than ever.

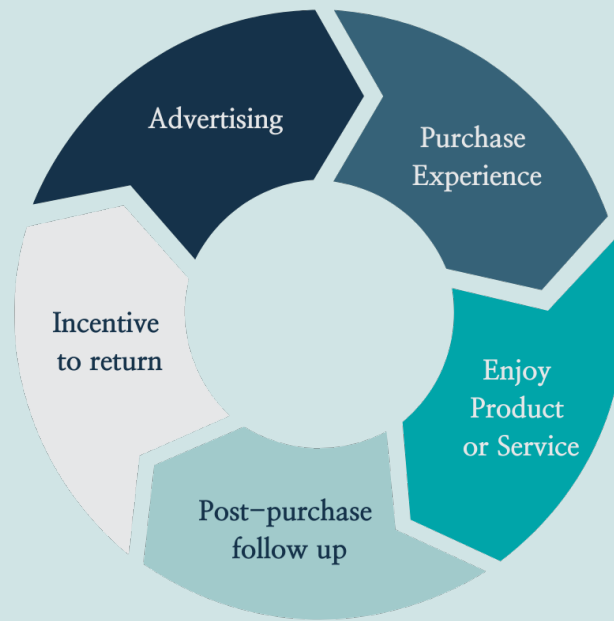
This guide is here to help you create strategies and a culture that empower you and your team to say yes to your customers enthusiastically.

Have fun with your happy customers!

Nicole Wetzell

Owner • Founder

FIRST, WHAT IS A CUSTOMER JOURNEY?



A customer journey is each touchpoint you have with people during their experience with your business or organization.

A “yes” culture is a **long-term strategy** that’s inclusive, kind, and equitable through every step of the journey. Your team strives to make people feel welcome and comfortable. From the top-down, everyone works together to create programs and policies that are people-focused and not so much on short-term gains.

Everyone says yes to requests as much as they can throughout your customer’s entire journey with you. You may think this is crazy because you need to pay the bills. Reviewing your policies to ensure they’re fair and in line with consumer behavior while balancing your bottom line is a part of this process. It’s also important to manage your customer’s expectations so you can sincerely tell your customers yes (instead of wishing you could say no).

WHAT IS A CULTURE OF “YES”?

YES! You won’t be able to accommodate requests because they’re not realistic, safe, unethical, or illegal. When this happens, try to offer solutions until the person is satisfied.



“

Above all words – a customer experience is defined by the customer, for the customer, at each touch-point, each time.

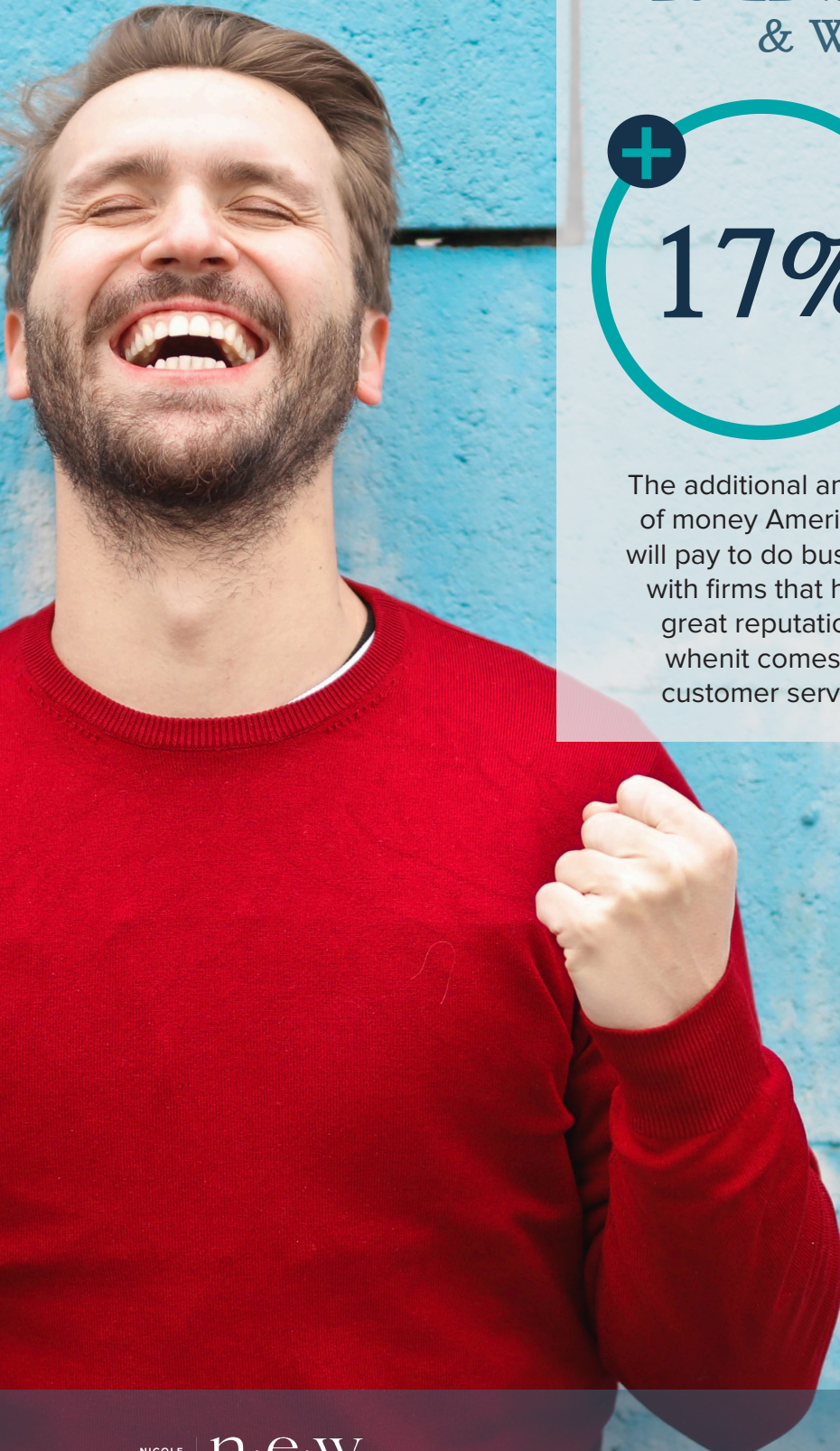
————— Esteban Kolsky, CEO of thinkJar —————

”

Your customers define what your value is to them and their own experience with you.

When they hear no, they're most likely to go to a competitor and even tell friends and family about it.

WHY CREATE A CULTURE OF YES?



PEOPLE WANT GREAT SERVICE & WILL PAY FOR IT



The additional amount of money Americans will pay to do business with firms that have great reputations when it comes to customer service



The amount of consumers who say they made an additional purchase from a company after a positive experience

POOR CUSTOMER SERVICE COSTS REVENUE & NEW BUSINESS

>50% • The number of Americans who say they've scrapped a planned purchase or transaction because of bad customer service

15 • The number of people Americans tell when they've had a poor experience

Source: American Express, "Customer Service Barometer" report

Always keep your customers'
LIFETIME VALUE
in mind before you say “No.”

LIFETIME VALUE FORMULA:

(Revenue/Purchase) x (Gross Margin/Purchase) x (# of Purchases)

Say you own a restaurant and a couple dines with you three times per year for five years:

$$\$150 \times 5\% \times 15 = \$112.50$$

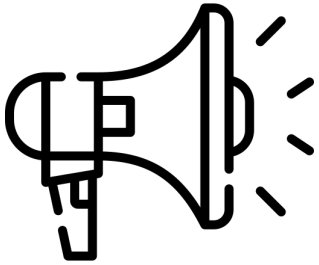
The couple asks for a couple of free drinks because they feel that they waited too long for a table, and the server says yes. Now, they're dining six times per year for two of those five years, and they pay \$175 for their dinner.

$$(\$150 \times 5\% \times 9) + (\$175 \times 5\% \times 12) = \$172.50$$

**That's an increase of \$60 or 53% in Customer Lifetime Value for just one couple.
Imagine this on a larger scale.**

HOW TO OPTIMIZE THE CUSTOMER JOURNEY

1



ATTRACTION: MARKETING & ADVERTISING

First, take some time to figure out who your current customers are and who you'd like to see as new customers.

You can have different target audiences or buyer personas.

Then, do some research on each target audience. Consider their other interests, what they're reading, websites and social media channels they visit, and so on. Although potentially pricey research like appending your mailing list with consumer insights is always helpful, you don't need to spend a lot of money. You can send a survey and even talk to a couple of your current customers to learn this information. Tell your staff to ask people where they heard about your brand. Even simply Google searching your desired audience(s) will give you a better idea of who your customer base is or who you're trying to attract to your product or service.

Tailor authentic strategies, messaging, and visuals that would appeal to each audience based on your data points.

Example:

If you're an orchestra building a new audience of young people, a social media post that's very formal and advertises a \$200 ticket will not appeal to them.

HOW TO OPTIMIZE THE CUSTOMER JOURNEY

2



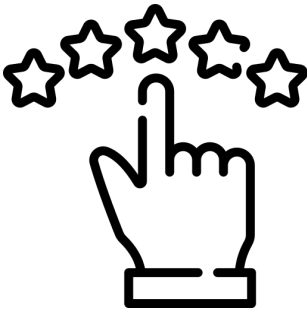
PURCHASE EXPERIENCE

Audit the online purchase pathway on your website at least once per quarter by going through it yourself and asking some members of your staff to review it. Here are some questions to ask yourself or ideas to consider:

- Is this pathway easy to use and understand?
- How can I reduce the number of steps or clicks needed to complete the order?
- Does my audience have to hunt for information?
- Download Hot Jar, which records how your customers are using your site, so you can see how your customers are using your site and adjust accordingly.
- Ask your staff about areas people are calling about because they're confused.
- This is an important place to manage expectations. Make sure that you're telling people about anything important, so you don't have to say yes when you want to say no later.
- Review your confirmations and make sure everything is correct. If you're not sending confirmations and shipping notifications, start sending them.
- If you and your staff interact with your customers in person or over the phone, your strategy comes down to your customer service and communication style. I give some advice on this on page 11.

HOW TO OPTIMIZE THE CUSTOMER JOURNEY

3



ENJOYING PRODUCT OR SERVICE

Someone noticed your brand and decided to purchase your product or service. Hooray!

At this point, you'll want to do everything possible to provide a great experience to your customers, so they want to come back or recommend you to other people.

Go through this process through the eyes of a customer:

RETAIL, RESTAURANTS, OR SERVICES

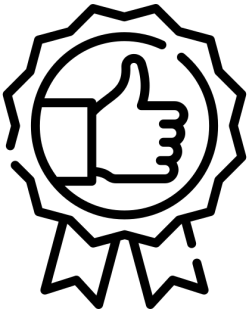
- What is it like when people walk in the door? Is it welcoming? Does it reflect the colors and vibe of your brand?
- If your staff is greeting people in person, are they doing so in a way that's in line with your brand? Note—you don't want your staff to give robotic greetings. You want to provide them with guidelines so that your customers will hopefully leave feeling cool, excited, sentimental, cared for, or whatever feelings you hope that they'll feel when interacting with you.

ONLINE & E-COMMERCE

- If you're shipping products, are you adding any personalizations or delightful surprises like a free sample?
- How does your packaging look? How do you want your customer to feel as they're opening your product?
- Is your customer new-to-file (aka never done business with you before)? Give them a special gift or discount just for being new.

HOW TO OPTIMIZE THE CUSTOMER JOURNEY

4&5



POST-PURCHASE FOLLOW UP

Now's the time to keep your relationship going while they're still excited. Reach out to say thank you and ask:

- For feedback—you can do this by sending a survey. Or, have the owner or a manager working at a higher level call the customer and ask them if they have some time to give you feedback.
- Once people give you feedback, really listen, even if it's critical. Sometimes, the feedback isn't realistic. Try to think about how you might incorporate that into your marketing or customer engagement plan.
- If they're enthusiastic about you, ask if they'll take some of their time to write an online review.
- Thank them again for their time.

INCENTIVE TO RETURN

Now, it's time to welcome them back. You can send an e-blast, direct mail piece, or target some ads to them:

- Depending on your pricing strategy, you can always offer the tried and true discount.
- Offer a gift
- Let them know that they're the first to know about a new or limited product or service

HOW TO CREATE YOUR “YES” CULTURE

FIRST, TAKE SOME TIME TO REFLECT

As the leader, you're responsible for setting the tone.

Ask yourself these questions:

- How do you treat your staff, especially when you're stressed out?
- Could they be providing bad service because you're short-staffed?
- Are you paying them well?
- Do you hold them to double standards?
- Do you let customers be abusive to them?



IF YOU'RE ANSWERING
“GREAT, I'M GREAT TO MY STAFF,”
ASK YOURSELF AGAIN.

A Gallup poll says that employee engagement is at 38%, and this is a record high.

There's a good chance that at least 62% of your team are disenchanted with your business—even your best employees.

As a leader, there are also power dynamics at play and you have the upper hand. People, especially your staff, treat you differently. Even in the best work environments.

If you create an environment that's uncomfortable for your team, they won't be honest, think of new ideas, or do their best. They're also most likely planning their exit strategy.

EMPOWERING YOUR STAFF TO SOLVE PROBLEMS

Inevitably, you'll have an unhappy customer or your staff will need to troubleshoot with a customer.

Empower them to solve problems on their own by providing some guidelines on what actions they can take without asking for approval. A simple example is telling them that they can solve the customer's problem within \$50.

TIPS FOR CREATING YOUR COMMUNICATION STYLE

A disappointing experience is often caused because the person's expectations before their journey with you have not been met. You and your team can manage expectations by giving as much information as you can to someone **before** they purchase your product or service and use it.



NAMES MATTER

People **LOVE** to hear their own name. Train your staff to use people's names as much as possible to establish a personal connection.



WRITTEN COMMUNICATION

Make sure your team provides the correct information clearly. Encourage them to **read what they're writing out loud or backwards**—you'll always catch something that way.



MAKE THEM COMFORTABLE

People may not purchase from you very often, or at all. Even though you're the expert, they're not and may feel intimidated. **It's your job to make them feel comfortable and inspire your team to do the same.**



KNOWLEDGE IS KEY

Make sure you and your team set aside time to read reviews and information about your product and service. If your staff works with customers over the phone or in person, require them to **always have your website up on their web browser** so they can quickly find the **RIGHT** answers to questions.



BE KIND & LISTEN

Be kind and empathetic when you're explaining policies. Listen with interest if your customer doesn't agree. Your staff members are both your brand and your customer's advocate. If someone comes to you because they think a customer **"has a point,"** listen to them and help them come up with a solution.



REPEAT INFORMATION

If you sell online, start sending order confirmations if you're not already.

If you or your team works with people over the phone or in person, get in the habit of **repeating all information about their order or request to them so everyone's on the same page.**

WORDS MATTER

Great Words and Phrases to Say Often

"I'd be happy to..." • "Please" and "Thank you"
"We can..." • "Let me check if we can..."
"I hear you and I can offer..." • "Yes"

Negative Words and Phrases to Avoid

"I can't..." • "Sorry, there's nothing we can do..."
"That's our policy..." • "I have no idea..."
"No"

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THANK YOU

If you have any questions or want to schedule a free consultation so we can talk about marketing and customer engagement strategies that work for you, please contact me.

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Schedule your consultation: NEWConsultingFirm.com/talk

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