"Joey Coleman reminds us that the **true, lasting path to profitability** is building customer relationships for life—and in this book, he shows you **exactly how to do it.**"

—Dorie Clark, author of *Stand Out* and *Entrepreneurial You*; adjunct professor, Duke University Fuqua School of Business

"Joey's work and expertise in the customer space are **bleeding edge**. *Never Lose a Customer Again* is a **must-read** for anyone growing a company, or wanting to grow in their role inside a company."

—Cameron Herold, founder of COO Alliance; author of *Double Double* and *Meetings Suck*

"Whether you're a solo entrepreneur or a Fortune 100 enterprise, this book is the **ultimate road map for making your brand stand out**. It's **guaranteed to become a classic**—not only in the genre of customer experience, but among business books in general. Implementing these revolutionary techniques is the best gift you can give your customers, your business, and yourself!"

—John Ruhlin, founder of Ruhlin Group; author of *Giftology*

"The techniques outlined in this book are **the absolute best way I know to keep your customers**. *Never Lose a Customer Again* is **directly applicable, funny to read, and filled with great examples**. By learning how to better care for your customers you will dramatically improve your bottom line. Read this book!" —UJ Ramdas, cofounder of Intelligent Change

"If you believe as I do that customer experience is the last true brand differentiator, and you're wondering how you can differentiate your business in a sustainable, competitor-proof way, then you have picked up the perfect book. There is **no one on Earth more passionate about the customer experience than Joey** Coleman (trust me, I've tried to match his passion!), and he translates that passion into an **actionable guide** to treating your customers right and taking your business to the next level. So many companies make the mistake of focusing all of their resources on acquiring new customers; instead, Joey's approach is to focus on keeping the customers you already have. And when you treat your customers and clients with the respect and consideration they deserve, they will pay you back with loyalty and a willingness to share their great experience with the world."

—Dan Gingiss, senior director of global social media, McDonald's Corporation; author of *Winning at Social Customer Care*

"Joey's **step-by-step guide** will show you how to wow your customers so that you'll never lose one again." —Vanessa Van Edwards, author of *Captivate*

"*Never Lose a Customer Again* provides a **gold mine of ideas, examples, and ready-to-implement action steps** designed to hook your customers early in the relationship and turn them into lifelong fans!"

—Nir Eyal, author of *Hooked*

"I was in the audience at the conference where Joey first tried out his First 100 Days® philosophy and watched it ripple through the crowd of seasoned entrepreneurs and business executives. He received a **standing ovation**. Since then, Joey has become an **incredibly in-demand speaker and writer**. *Never Lose a Customer Again* is the next step in that journey."

—Ryan Holiday, Wall Street Journal bestselling author of *The Obstacle Is the Way* and *Ego Is the Enemy*

"*Never Lose a Customer Again* is a roadmap for the most practical marketing strategy you can employ: creating an exceptional customer experience."

—John Jantsch, author of *Duct Tape Marketing* and *The Referral Engine*

"Joey is **top of the field** when it comes to customer experience design. I have called on his counsel through most of my career. When he showed me his model in this book, **my jaw dropped** because I realized—**it usually takes years to develop world-class customer service**. But **this process can get a company there in weeks.**"

—Robert Richman, former culture strategist at Zappos and author of *The Culture Blueprint*

NEVER LOSE A CUSTOMER AGAIN

Turn Any Sale into Lifelong Loyalty in 100 Days

JOEY COLEMAN

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Portfolio/Penguin
An imprint of Penguin Random House LLC
375 Hudson Street
New York, New York 10014



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Library of Congress Cataloging-in-Publication Data

Names: Coleman, Joey (C. Joseph), author.
Title: Never lose a customer again : turn any sale into lifelong loyalty in 100 days / Joey Coleman.
Description: New York : Portfolio/Penguin, [2017] | Includes bibliographical references.
Identifiers: LCCN 2017052226 | ISBN 9780735220034 (hardcover) | ISBN 9780735220041 (epub)
Subjects: LCSH: Customer relations. | Customer loyalty. | Marketing.
Classification: LCC HF5415.5 .C6144 2017 | DDC 658.8/12—dc23
LC record available at https://lccn.loc.gov/2017052226

Printed in the United States of America
10 9 8 7 6 5 4 3 2 1

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NEVER LOSE A CUSTOMER AGAIN

CHAPTER SEVEN

The Eight Phases of the Customer Experience

The eight phase model takes customers from the first interaction to the point where they are raving fans. Every customer has the *potential* to travel through all eight phases, yet most businesses fail to guide the customer all the way through to the end. In fact, most stall out somewhere between phases 4 and 6, missing out entirely on the benefit of loyal customers and raving fans.

Each subsequent chapter of this book will dive deep into each individual phase, showcasing companies that are creating remarkable customer experiences and outlining a series of steps you can take to make your customer interactions incredible in each potential phase of the customer journey. Before that, allow me to offer an overview of the eight phases.



PHASE 1: ASSESS

In the Assess phase, the customer is deciding if they want to do business with you. They are learning what to expect from your organization and

sharing (explicitly and implicitly) their expectations for the relationship. The customer is hopeful that you'll be able to help, but it's cautious optimism at best. If you don't position yourself as fulfilling their needs while wrapping them in a great customer experience, they won't choose to work with you. If you can convince them that you are the best choice, they will move forward with the purchase. This dance between the customer and the organization is what most people would refer to as "sales and marketing." The potential customer is *assessing* their options.



PHASE 2: ADMIT

The Admit phase begins when the customer admits they have a problem or a need and believe you—the company or organization—can solve it. As a result, they buy your product or sign up for your service. This is often referred to as "the sale," and sadly, in most businesses, this is where any customer-focused initiatives end. At this point, the customer is feeling joy, euphoria, and excitement that the search is over. If you fail to acknowledge this, you miss the chance to strongly associate this emotional high with your product or service. If you meet the customer's emotional state in this moment, you can prolong these positive feelings. This person transitions from prospect to customer when they *admit* that they need your product or service.



PHASE 3: AFFIRM

The Affirm phase is more commonly known as "buyer's remorse." The customer begins to doubt the decision they just made to work with you. Almost every businessperson has heard of the buyer's remorse concept, yet few businesses do anything to counter their customer's feelings of

fear, doubt, and uncertainty. If you don't address these feelings, you will need to work overtime to get back to the state of joy, euphoria, and excitement the customer felt in the Admit phase. If you focus on these temporary feelings (before they become permanent), you can quickly shift the customer back to positive feelings. You must quickly *affirm* the new customer's decision to do business with you.



PHASE 4: ACTIVATE

The Activate phase begins with the first major postsale interaction, when the relationship between customer and organization first materializes in a meaningful way and the business begins to deliver on the promises made during the Assess phase. The Activate phase can be marked by the receipt of a purchased product, the start of a service, or an initial kickoff meeting to get things rolling. The customer is excited to get started but somewhat anxious about whether everything will go as promised. If you don't start things off on the right foot, it will be hard to overcome that first impression. If you do start things off strongly, you can build momentum to carry you deep into the relationship. This phase's title and associated icon should prompt you to energize the relationship and propel it forward. You need to *activate* the new relationship in a significant and meaningful way.



PHASE 5: ACCLIMATE

In the Acclimate phase, the customer learns about (and hopefully grows comfortable with) an organization's way of doing business. Too many businesses that have delivered their product or service dozens, hundreds, thousands, or millions of times assume that everyone in the

world knows their particular process. For the customer, this is most likely the first time they've ever experienced this particular way of doing things. They are at best unsure and at worst frustrated by the lack of familiarity. If you don't properly onboard the customer and get them bought in to your approach, they will never become a long-standing, loyal customer. If you do hold their hand along the way, you can ensure a smooth transition as they embrace your approach. You must *acclimate* customers to your way of doing business.



PHASE 6: ACCOMPLISH

The Accomplish phase of the customer experience occurs when the customer achieves the result they were seeking when they decided to do business with you in the first place. This may be the time they use the product and achieve the desired impact, or the time when your service delivers on the hopes they had at the beginning of the relationship. If you don't deliver, the customer's emotions can range from unsatisfied to angry. If you do deliver (and the customer agrees), they will vacillate between happy and ecstatic that everything went as planned. In order for the relationship to advance, the customer must *accomplish* their original goal.



PHASE 7: ADOPT

In the Adopt phase, the customer takes ownership of the relationship, leading the charge on deepening and strengthening the bond. In this phase they proudly show their support and affinity for your brand and are thrilled to be associated with your reputation. If you don't make them feel like they're part of an exclusive tribe, receiving unique rewards and participating in a special, shared language, you will never

have their complete loyalty. If they do feel compelled to embrace you, you will have a customer for life. You want the customer to *adopt* your way of operating and take an ownership stake in the relationship.



PHASE 8: ADVOCATE

In the Advocate phase, the customer becomes a raving fan, zealous promoter, and eager referral engine all in one. In this phase, they develop into a built-in, unpaid, uncommissioned marketing representative, singing your praises far and wide to other potential customers who might benefit from your product or service. If you don't persuade them to promote you by making it worth their while, they will likely continue as a customer but will never help you grow the business. If they are motivated to promote you, your business will grow in unimaginable ways. The ultimate customer is one who becomes an *advocate* for your business or brand.

YES, ALL EIGHT PHASES APPLY TO YOU

All eight of these phases are the same for *every* business. They show up in the same order, regardless of the type of customer you serve, the industry you operate within, or your product or service offerings.

All customers go through the initial phases. If you help them along the way, they will continue through the process, eventually arriving at the final phase where they become advocates for you and your business.

If you don't guide them along the way, customers can get stuck in a phase, revert backward, or in the worst case, exit the journey altogether.

Depending on the type of business, the amount of time a customer stays in each specific phase differs. But the goal is always the same—keep moving your customer through the phases to *stop losing customers and make every customer a customer for life.*

THE SIX WAYS TO COMMUNICATE IN EACH PHASE

When interacting with your customers, there are six key mediums of communication that, when used together, create a comprehensive and remarkable experience: in-person, email, mail, phone, video, and presents. Each medium creates a different emotional experience. The impact on customer engagement depends on which phase the customer is in and how the medium is applied. I am not suggesting you must use each medium in each phase—only that it's possible. At the end of each subsequent chapter, I'll share suggestions and examples for incorporating each medium into that specific phase.



IN-PERSON

In-person interactions are the oldest medium of human communication. Sitting across the table from a customer, speaking to them directly, and looking them in the eyes is the most effective way to create and build rapport in a relationship. In-person interactions allow you to show your level of commitment to the customer and their importance to your business. These interactions also eliminate any of the misunderstandings that can arise in other forms of communication.

In addition, the ability to read the customer's body language in the moment lets you know whether the points you make are heard and understood. It also gives the customer the opportunity to read your body language and see your sincerity.



EMAIL

In a world where communication is 24/7, email has become the primary medium businesses use to interact with customers. Email is inexpensive and easy to track. With current technology tools, you can see when the customer reads the email, how many times they read it, and at some point in the hopefully not-too-distant future, whether they understood the content and intention behind the email.

Because email is so inexpensive as a medium, nearly every business uses it as their primary method of customer communication. Because it's so prevalent in business communications, email overwhelm is increasingly common.

Very few people are sitting in front of their computers or their phones right now, saying, "I wish I were receiving more email!" But email can still be a valuable way to interact with your customers, provided it feels personalized and purposeful.



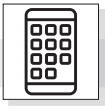
MAIL

With the proliferation of email, physical or direct mail (sometimes referred to as "snail mail") has almost disappeared from the scene.

As a result, the empty mailbox is now an even better place for reaching customers. Because there isn't nearly as much competition in the physical mailbox as there is in the electronic inbox, interacting with customers using this medium cuts through the noise quickly.

In an increasingly digital world, physical communication is more valuable today than ever before.[1] We've all experienced the emotional difference between receiving a handwritten thank-you note in our

mailbox versus a form-filled thank-you note delivered to our inbox (or more likely, captured by a spam filter).



PHONE

The phrase "Reach out and touch someone" was coined in reference to the use of a phone as a medium of communication that was as close to "in person" as possible.

Today, not only is the average customer personally accessible via a phone, but most likely you can reach them at any given time of the day, in any location. Morning, noon, or night, 91 percent of people keep their phone less than three feet away from their body (within arm's reach) at all times.[2]

Picking up the phone and having a conversation with your customer, or sending a personalized text message, allows you to communicate in a tailored way that almost guarantees you will reach the customer immediately. Consider the impact of Dr. McCann's phone call to me the day after I had my new crown installed (discussed in chapter 2). The communication reached me immediately and allowed for a meaningful and thoughtful connection. In terms of speed of response, text messages are replied to faster than email. According to the trade association CTIA (which represents the wireless communications industry in the United States), it takes ninety minutes for the average person to respond to an email—but only ninety *seconds* for the average person to respond to a text message.[3]



VIDEO

Attached to your cellphone is a video camera that is more powerful and capable than the best video cameras on the market just twenty years ago.[4]

Customers are increasingly consuming information via video on

YouTube, Facebook Live, and other online video platforms.[5] Most businesses haven't even begun to take advantage of using video as a medium to communicate with their customers, despite the fact that Facebook CEO Mark Zuckerberg believes "[w]e're entering this new golden age of video. I wouldn't be surprised if you fast-forward five years and most of the content that people see on Facebook and are sharing on a day-to-day basis is video."[6]

Creating personalized, customized messages for customers is an opportunity most businesses overlook. The average business or business owner assumes they must first set up a video studio in the office, prepare a green screen, get the lighting just right, write a script, film the video, have it edited, add in sound and animations, and then send or post the video to a specific customer. This belief around the use of video couldn't be further from the truth.

Research shows that a handheld video, shot using the video camera on your mobile phone, with little to no script, and without much concern for the background or the setting, has a higher likelihood of not only getting through to your customer, but converting them to take the action you desire. In short, the informal video often works better than the more polished version.



PRESENT

The final communication medium, sending or giving your customer a present or gift, seems obvious, and yet it is one of the most overlooked ways to trigger positive customer emotions.

While some companies worry about rules and regulations, and considerations around gifting (which, depending on your industry and compliance rules, may be legitimate concerns), those that find creative ways to acknowledge their customers with presents build relationships

and emotional connections with their customers that the other mediums don't allow.

The best presents are meaningful and personalized. They exhibit a level of care and consideration commensurate with the relationship. In fact, it's better not to send a gift if you're planning to give a standardized, "bulk" gift that feels sterile and common.

Worse yet, sometimes companies give "gifts" that aren't really gifts at all. Giving a customer a coupon for 20 percent off a future purchase is not a present *for the customer*; it's a present *for your company* that you hope will be used to increase your overall sales numbers. Giving a customer a mug with the logo of your business on the side of it is not a present for the customer; it's a free marketing tool you're hoping other people will see.

You don't have to put on a cape and become "Super Creative" to come up with gift ideas, nor do you need to break the bank. Just ask yourself what you'd get your favorite sibling or your best friend if they were your customer. If you like to call your customers "family" in your marketing materials, you should give gifts that treat them like family, instead of like cogs in your marketing machine.

Sending a personalized gift isn't nearly as hard as most people believe. For example, if you know a customer is a regular reader of business books, getting a book signed and personalized by a top author is a great way to give a thoughtful and meaningful gift that (1) costs less than $30 and (2) fosters the customer's growth and learning.

PHASES, TOOLS, AND CUSTOMERS, OH MY!

At this point, considering the various phases your customers go through and the tools you can use to enhance their experience might feel a bit daunting.

Instead, consider being open to the fact that you may not have considered these phases in the past—and now you can. You may only be using two or three of the communication tools available to you (this is the average number in use whenever I poll my audiences about their current customer experience journey) and now you have more options for interacting with your customers.

Phase	In-Person	Email	Mail	Phone	Video	Present
Assess *chapter 8*	Wealth Factory (p. 66)	Notes from the Universe (p. 71)	Corporate Executive Board (p. 57)			
Admit *chapter 9*	Build-a-Bear (p. 87) Ridemakerz (p. 92) Tony Robbins Cos. (p. 93) Maverick 1000 (p. 104) Notre Dame Glee Club (p. 100)	Tony Robbins (p. 95)	Zogics (p. 97)		Zogics (p.98)	Tony Robbins (p.94) Zogics (p.99)
Affirm *chapter 10*	CarMax (p. 126)	Book in a Box (p. 119) CD Baby (p.123) Casper Beds (p.126) Zappos (p.126) Lands' End (p.127)	Book in a Box (p. 133) CADRE (p. 120)	Book in a Box (p.120) CADRE (p.128)	Total Debt Freedom (p.114)	Book in a Box (p.121) CADRE (p.130)
Activate *chapter 11*	World Bank (p. 148)		Apple (p.141) Tech 4 Kids (p.143) 23andMe (p.145) Cornerstone Wealth (p.147)		Tech 4 Kids (p.143)	Apple (p.141) Cornerstone Wealth (p.147)
Acclimate *chapter 12*	PolicyMedical (p. 168) San Francisco CrossFit (p. 169)	PolicyMedical (p.146) San Francisco CrossFit (p.170) Acceleration Partners (p.174)	PolicyMedical (p.166)	Domino's Pizza (p.161) Delta Airlines (p.173)		PolicyMedical (p.182)
Accomplish *chapter 13*	Yoko Co (p. 198)	Online Trainer Acad. (p.191) Audible (p.195) Yoko Co (p.199)	Ongoing Operations (p.186) Online Trainer Acad. (p.190)	Baro (p. 205)		Ongoing Operations (p.186) Online Trainer Acad. (p.190)
Adopt *chapter 14*	Apple (p. 220) Harley-Davidson (p. 221) Starwood Hotels (p. 226)		Sephora (p. 216) Chicago Cubs (p. 228) Taylor Swift (p. 234)	Lady Gaga (p. 224)	Lady Gaga (p. 224)	Sephora (p. 216) dōTERRA (p. 225) Starwood Hotels (p. 225) Chicago Cubs (p. 228) Taylor Swift (p. 231)
Advocate *chapter 15*	Maverick1000 (p. 257) MastermindTalks (p. 260)	ViaCord (p. 240) 4Knines (p. 244) Dropbox (p. 251) Delta/AMEX (p. 254)	anonymous suitcase (p. 258)			Dropbox (p. 265) Delta/AMEX (p. 265) Maverick1000 (p. 265) MastermindTalks (p. 260)

Rest assured that in the remaining sections of the book I'll be presenting a step-by-step process for assessing the phase your customer is in, mapping their current experience, and enhancing their journey with a variety of tools and techniques.

Let's consider the beginning of the customer life cycle—Phase 1: Assess.

Phase 1: Assess



Overview of the Assess Phase

In the Assess phase, the customer is deciding if they want to do business with you. They learn about your organization and they share their expectations for the relationship. Most people refer to this as "sales and marketing."

THE $35,000 GOLF BALL

Before starting my company, I worked for an organization called the Corporate Executive Board that is best described as a "for-profit think tank." We researched the secrets of great organizations around the world and shared our findings and recommendations with clients (C-suite leadership) in the form of written reports, keynote presentations, and on-site workshops.

While it may not be obvious based on my title of associate director, member services, my job was really a sales position. I met with senior executives at Fortune 1000 firms and did my best to entice them to sign up for a membership in our organization. I would fly to a company's headquarters, meet with their senior executive(s) for one hour, and in that short time frame try to persuade them to spend (on average) $35,000 on an annual membership so they could have access to our findings and recommendations.

One day, I found myself meeting with a senior executive at an energy company in the southern United States. I walked into his office and was stunned by both the size and the decor. The office was huge. If I had to guess, I would say it was forty feet long and about twenty feet wide. What was even crazier was the fact that everything in the office was about . . . golf.

This senior executive did not have a little practice green in his office where he could put golf balls into coffee cups like a scene from a 1980s business movie. He had a *four-hole, mini golf course in his office*! It had everything but a windmill.

The office walls were covered in polished wood paneling and adorned with photographs from the world's top golf courses. Images from St. Andrews, Augusta, Pine Valley, Shinnecock Hills, and Royal County Down added a plush green hue to the scene, and there was a polished wood rack along the wall that housed a half dozen golf bags filled with clubs of all shapes and sizes.

When golfers die and go to heaven, but still have to work a desk job every day, they go somewhere like this office.

The executive ushered me to a seat right in front of his enormous, carved-wood desk. As we sat down, I found myself compelled to acknowledge the elephant in the room.

"So, Bobby, it seems to me you might be a fan of golf?"

The executive laughed and said, "What was your first clue?"

For the next fifty-seven minutes, we talked about nothing but golf. I am by no means a good golfer, but I've spent enough time on the links that I could ask interesting questions and show that I had a better-than-working-knowledge of the topic.

I was also lucky. The week after this meeting, I was going to be on vacation with my family (my dad and my brothers are all avid golfers), and we were headed out to California to play Pebble Beach (if you're not

familiar with the game, Pebble Beach is basically nirvana for golfers). I shared the details of this trip with the executive and, to my surprise, he whispered, "Joey, I've never had the chance to play at Pebble Beach."

"Well, I'll make sure to let you know how it goes," I promised.

This shift in the conversation brought the "golf" portion of our discussion to a close. Realizing we had only three minutes left in the meeting, the executive said, "I'm sorry we spent all this time talking about golf, but I do have to end the meeting on time as I have another commitment."

I reached into my bag, removed a sample research report I'd brought along to share, and said, "No problem. What I can tell you is that when you are with us, you will be part of an exclusive club that will feel like Augusta. We will take care of you in ways you can't even begin to imagine. You will be surrounded by peers who you look up to, and admire, and can learn from. Like a pro caddy for your business, we will present you with the best research and the best knowledge to keep you in the fairway and avoid hazards now and in the future. This research is a sample of our work for you to consider—and I thank you so much for your time." I handed him the report and I left the room.

A week later, as I was walking through the Pebble Beach Lodge Gift Shop, I noticed a golf ball that not only had the logo of Pebble Beach, but also the logo of the U.S. Open. As luck would have it, that year marked the one hundredth anniversary of the famous tournament and it was going to be played at Pebble Beach in a few months.

I bought one of the golf balls, went to the hotel concierge for a piece of paper, and wrote:

Dear Bobby,

We had a glorious day playing Pebble Beach. When I saw this golf ball celebrating the 100th anniversary of the U.S. Open, I thought

of you. I hope this memento is a welcomed addition to the fantastic golf paradise in your office!

Maybe someday we'll get the chance to play here together. . . .

Sincerely,
Joey

I put the folded letter and the golf ball into a FedEx Pak and had it shipped out for delivery the next day. Two days later, I was back on the golf course when my cellphone rang (a horrible display of golf etiquette, I know). I answered the phone and heard my prim and proper assistant ask in her lovely southern drawl, "What the heck did you do to Bobby?"

"Excuse me?" I replied.

"I just got a call from his assistant asking for our fax number and a contract because he wants to sign up and join our membership today!"



Quick Takeaway

It's not all about the sale. Connect with the customer and meet them where they are. Then follow through (sorry, I couldn't resist the golf reference). Going above and beyond takes only a little extra effort and creates a huge return.

THE ASSESS PHASE: CAN YOU SOLVE MY PROBLEM?

The first phase your customer experiences is *Assess*. This phase occurs *before someone becomes a customer*. In this phase, the potential customer *assesses* whether your company will be able to solve their problem or provide the product or service they desire. Sometimes the assessing happens on a gut level—customers often don't know what they want,

but they feel they want *something*. The story you tell through your marketing either resonates emotionally with them or it doesn't.

What many sales and marketing teams don't realize is that prospective customers are trying to feel out how they'll be treated postsale (that is, once they surrender their money and all their leverage is gone). They know that sales teams can "talk the talk"—and they worry that the account reps down the line won't "walk the walk." Oftentimes this worry is subconscious.

My experience with the $35,000 golf ball taught me a valuable lesson about this phase:

How you make people feel about what it's going to be like to do business with you is even more important than your actual product or service.

Bobby later told me he hadn't even read the report I gave him. Because I had given him a taste of what it would be like to participate in our membership and be treated in a remarkable way, I made the sale.

The impact of the golf ball on my sales efforts is an example of the power of this stage. The prospect gets a taste of the continued experience of doing business with you, and if the taste is compelling enough, the prospect can't help but want more.

The best companies in the world take the customer experience offered *after* the sale and infuse it into marketing and sales, so the customer gets a flavor of the good things to come. This not only incentivizes prospects to sign on the dotted line, but it properly sets the expectations for what will happen after the sale.

WHETHER LONG OR SHORT, THE ASSESS PHASE ALWAYS HAPPENS

How much time a prospect spends in the Assess stage varies greatly. It can be a long, medium, or short process depending on the customer,

the company, and the product or service being offered. This phase can last for days, weeks, or months—or even mere seconds.

Consider a senior-level executive who wants to hire an executive coach to learn how to get better at employee interaction. The executive has many options. They will likely research and review several top executive coaches, interview them, possibly read their books, and then decide which one they want to work with. This assessment will take weeks and possibly months.

On the other hand, what if you need peanut butter? You go to the peanut butter aisle at the grocery store, look at the dozens of brands of peanut butter, spot-check the prices, consider the jar size, review the ingredients, look at the packaging . . . and decide within a matter of seconds which one to add to your shopping cart.

The length of the Assess phase varies based not only on the size and significance of the purchase, but on the amount of thought and consideration the prospect is willing to invest. For an action the prospect considers to be low impact/low risk, the decision is usually made quickly. For an action that has ramifications on job security, impacts family stability, or involves high-dollar investment, the decision usually takes much longer.

MARKETING AND SALES OFTEN FAIL TO CONSIDER THE ASSESS PHASE *EXPERIENCE*

In a typical business, the activities associated with the Assess phase usually fall under the responsibility of the marketing and sales departments. Whether these efforts include running ads, distributing promotional materials, optimizing a website for search, or participating in a trade show, they are all a part of the customer acquisition effort that

attempts to drive prospects to the ultimate decision—and in the process, make a sale.

The problem is that what happens *after* the sale is rarely addressed in any of these sales or marketing conversations.

Traditionally, the marketing department has seen its job as being twofold:

1. convince the customer there is a problem, and
2. present the company or product as the solution to that problem.

More advanced marketing departments present their service or product as the way customers can achieve their goals and desires. The sales department then takes those aspirational goals and aligns them with the product or service in an effort to persuade customers to invest their time and money to make a purchase.*

Yet there is rarely, if ever, a meaningful discussion about what kind of experience the customer can expect *after* the sale.

At best, salespeople say things like "We'll take care of you," or "We love our clients," or "You're important to us." These generic statements focus on the benefits of doing business with the company but don't address any of the aspects of *how* the organization is going to help prospects achieve their desired results. The customer is told that they are going to be taken care of, but they are never told how that will happen.

To bring the customer experience forward into discussions with a prospect, it's important to both *share* and *show*. *Share* your customer experience philosophy and detail the mechanisms you have in place to make sure you deliver a consistent, remarkable experience throughout

*This focus on marketing and sales is, in and of itself, not bad. It works. I don't think we need to demonize marketing and sales to elevate the importance of the customer service/customer experience roles. As a marketer and salesperson myself, I understand the importance of these two responsibilities.

the customer journey. *Show* the prospect what this looks like by treating them as if they are already a customer. Unexpected presents, extra little touches, and thoughtful gestures during the Assess phase offer an emotional preview of the experience to come.

THE SALESPERSON ISN'T THE PROBLEM—IT'S THE STRUCTURE

In most organizations, the person responsible for getting the sale is not the person responsible for delivering on the experience afterward.

The salesperson's job is to convince the prospect that doing business with the company is going to be an incredible experience, well worth the investment of dollars and time. Salespeople usually have no incentive to paint a proper picture of what life is like after the sale. The salesperson is not concerned about getting the right prospect—a person who will be a good fit and stay with the company for a long time—because they are typically incentivized by the total number of *new* accounts, not retained accounts.

This typical organizational structure creates a functional disconnect between what drives and motivates the salesperson and what makes for a successful customer experience. The salesperson has no reason to build a long-term relationship with the prospect. Once the goal (making the sale) is achieved, they pass the relationship to someone else. The salesperson usually doesn't care about whether the handoff goes smoothly.

The problem with this mentality is that the prospect believes that the information they share with the salesperson—the problems, the needs, the expectations, the requirements—is going to be seamlessly transferred to the account manager (or some similarly titled individual) after the sale is completed.

This is rarely the case.

Anyone who's ever been in sales—or purchased something in this scenario—knows the handoff is anything but smooth. The proverbial "baton" is dropped more often than not—so much so that the typical salesperson should be "disqualified" on nearly every deal!

Salespeople usually focus too much on the early stages of the process, glossing over the specific steps that come after the handoff, once the salesperson isn't leading the conversation. "You'll sign the contract, pay the initial invoice, and then be transitioned to your new account representative. After that, the representative will work with you to make sure the project runs smoothly. . . ."

This glib discussion of the process post handoff leaves most customers feeling uncertain about the relationship with the new account representative. The information captured from the prospect is seldom relayed back to the individual or the team that handles delivery, implementation, account management, or execution. Rarely does the salesperson address the emotional/personal experience the customer will have when dealing with the company after the sale.

The "feelings" associated with working together are just as important as the steps and deliverables, yet are rarely addressed. According to research by international consulting firm McKinsey, 70 percent of buying decisions are based on how the customer feels they are being treated.[1] If a salesperson fails to take the prospect's feelings into consideration, the organization will grow stagnant and die from lack of sales.

This typical organizational structure creates a functional disconnect between what drives and motivates the salesperson and what makes for a successful customer experience. This behavior is ingrained in the company's processes and procedures and in most instances leads to failed transitions.

The good news is that it's not hard to fix this problem.

The bad news is that it takes a shift in thinking and behavior within the entire organization, and specifically within marketing and sales. But don't worry. They can handle it!

PREFRAME YOUR PROSPECT

To avoid disappointment after the sale, the salesperson should "preframe" the customer experience—in other words: explain and demonstrate the look and feel of the experience after the sale, as well as set expectations for future interactions. The salesperson needs to paint a picture of what can be expected and then put the prospect at ease by detailing what will happen to make sure this image of life after the sale becomes a reality.

To preframe in a meaningful manner, have interactions during the sales process that show the prospect you've been paying attention. By making your attention to detail evident during the sales process, you send a clear message that the prospect will receive this level of focus *after* the sale.

DRINKING "BEERS" AT 9:00 A.M.

I recently attended a three-day seminar hosted by the financial advising firm Wealth Factory in Salt Lake City. The event was designed to introduce prospective clients—typically, entrepreneurs—to Wealth Factory's services and offerings. The goal of the event was to provide valuable information about managing all aspects of wealth and finances, and to position Wealth Factory as experts in the field. If the Wealth Factory team achieved their goal, they hoped attendees would sign up to work with them on an ongoing basis.

When I walked into the seminar room just before the 9:00 a.m. start time, the founder and chief wealth architect of the company, Garrett Gunderson, came up to me and said, "Joey, we're so excited to have you here with us."

"Thanks so much," I replied. "I'm excited to be here and learn more about your business."

Garrett then took the conversation to an unexpected place. "A little birdie told me that you like root beer," he said.

Someone had clearly done his homework.

I don't drink alcohol. I don't drink milk. If offered a Coke or a Pepsi, I decline both. When it comes to drinks, my typical choice is simply a glass of water. That being said, I love root beer.

In fact, I am a bit obsessed.

Garrett produced a six-pack of (very good) root beer and explained, "While we have refreshments throughout the event for everyone in attendance, we wanted to have these special ones just for you."

With a simple gesture before the event even started, Garrett made me both a fan of his and of the Wealth Factory's by extension.

Doing the "homework" to tailor the experience to your prospective clients is an incredible way to show them how much you actually care. By investigating the individual's interests, likes/dislikes, hobbies, and habits, you can easily craft a series of interactions that will light up the prospect on an emotional level.

My appreciation of Wealth Factory didn't stem from their providing me with a delicious drink, although that was a nice added bonus. I fell for Wealth Factory because they took the time to find out a little "quirk" about my personality and interests and then took action to show me they had done their homework. By giving me a root beer, Wealth Factory showed me they care about their clients.

While previewing the customer experience during the Assess phase is certainly about respecting the prospect and doing the homework, I think the more important goal is to quickly build rapport via personal and emotional connections. The fact that Garrett would do the research, procure the root beer, *and* have it ready for me at an unexpected time (9:00 a.m.?!) shows a level of dedication and focus on "the little things" that is not the usual customer experience.

Want to guess whether I'm a client of Wealth Factory's now? Yes, and a very happy one.

(In the interest of full disclosure, Wealth Factory became a client of mine as well. When we talked about systematizing prospect and client interactions, Garrett was excited. While he knew Wealth Factory did many things "right," like most exceptional business leaders, he knew there was always room for improvement.)

Too many salespeople are concerned with making the sale today and in doing so miss out on the long-term benefits of taking the time to build rapport. While it certainly requires more work and will likely take more time, the return on this investment of effort is incredible over the life cycle of the customer relationship. By helping salespeople see the benefit of moving beyond transactional relationships and implementing sales incentives that align with securing long-term customers, an organization can avoid customer turnover and instead bring in the right customers from the beginning.

Instead of concentrating on closing the next sale, the best salespeople focus on the long-term relationship—even if it means passing on an opportunity today in order to secure a deeper connection in the future. Evaluating whether a customer will truly benefit from your product or service, and sharing your recommendation with them—even if the recommendation is to *not* purchase your product or service—

helps establish trust before the relationship officially begins. Pointing the customer in the direction of a competitor's service or product that would serve them better is another way to ensure that the prospect comes back to you next time they seek a solution. These types of selfless acts prove to the prospect that you are interested in a long-term relationship as opposed to making a quick sale.



Quick Takeaway

Do the homework. Investigate your prospective customers to discover ways to please and surprise them very early in the relationship. If you can find one or two key personal details, you can grab and hold the customer's attention. If your product or service isn't the right fit, make sure to let the prospect know. This level of honesty is rare and always results in the customer coming back when they need help in the future—because you've built trust, even though it came at the expense of getting a sale in the moment.

PREFRAMING WORKS INDIVIDUALLY AND ACROSS YOUR ENTIRE ENTERPRISE

Preframing works on multiple levels. This technique allows a business to go above and beyond the usual sales and marketing activities in order to make an experience memorable. By showing a prospect what to expect once they become a client, you can both set expectations effectively and hint at the good things to come.

Preframing is not about singing your own praises and telling the prospect why you're going to be a great fit for them. It's not about explaining why you have the credentials, experience, and expertise to help them solve their problem.

It's about making the experience all about the customer by showing them what it will be like to work with you once they decide to purchase your product or sign up for your service.

Some business owners begin to worry when they hear these stories.

What do we have to do to create these bespoke experiences? How do I teach my employees to do this? How much will all of this cost? How do I do this once I have more than two or three customers?

That's why I wrote this book, to teach you the answers to all of these questions.

Doing these things is much easier than you might expect. Identifying ways to create emotional connection with a customer can take as little as two minutes if you're willing to listen when they speak and/or spend a few minutes perusing their social media profiles.

Employees can be taught how to do this, and the first step is modeling the behavior by showing this level of interest and investigation into your employees' lives. It's almost impossible to expect an employee to "wow" a customer if they have never personally experienced being wowed.

That sentence bears repeating because I see it as one of the biggest problems with customer experience initiatives today: It's almost impossible to expect an employee to "wow" a customer if they have never personally experienced being wowed.

The impact of an experience has very little to do with the cost of the experience. A single golf ball led to a five-figure consulting engagement. A six-pack of root beer led to a $3,000 per month ongoing retainer fee. It's not about the dollars; it's about the thoughtfulness.

Personalized communications and connections *can be systematized and done at scale*. Certainly it requires more effort, but once the philosophy is adopted across the organization and investments are

made to identify, track, and act on customer information, the effort to design remarkable experiences becomes minimal.

Stunning emotional effects can come from creating connection with your customers. When interacting with your business, the desire of your customers is actually quite simple. . . .

They want to feel special. They want to feel important. They want to matter. If you can make them feel this way, on a consistent basis, you will keep your customers for years.

THE UNIVERSE HAS A MESSAGE FOR YOU

Creating personal and emotional connections with customers doesn't need to be a "one-off" exercise where every interaction is customized at an individual level with a large investment of time, money, and effort.

There are easy ways to implement personalization and show a high level of care in your preframing, prospecting activities. At this stage in the relationship, the potential customer will happily volunteer some personal details—especially if this request for information seems innocuous. Once the prospect becomes a customer, you can use these details to personalize ongoing communications. The customer will likely forget that they shared the information during the Assess phase and will be amazed when you showcase your ability to recall their personal information.

Years ago, a friend forwarded me an inspirational email. I was so captivated by the message that I signed up to receive these daily missives.

Mike Dooley's "Notes from the Universe" started in 1998 as an email sent out weekly to 38 of Mike's friends. Since then it has grown into a daily message sent to more than 750,000 subscribers in 185 countries![2]

These email "Notes" are brief passages written to you by "The Universe." Personalized with your name and occasionally your personal goals and dreams, the Notes are designed to remind you of everything good in your life. The messages are encouraging, inspiring, thought provoking, and at times even emotion triggering.

To receive the "Notes from the Universe," an individual visits the TUT website (www.tut.com) and provides the following information:

- Name
- Email
- Country
- Nearest City
- Birthday

The site also asks you to complete the following sentences:

Goal 1: I "now" have my own _____.

(e.g., beautiful vacation home)

Goal 2: I will soon _____.

(e.g., help millions of people every day)

Once you hit Submit, from that day forward you receive an inspirational message in your inbox, a note from the Universe encouraging you to see the world a little differently and keep moving forward toward your goals.

I'm not 100 percent sure how I answered the questions when I signed up many years ago, but I do recall that at the time one of my personal goals was to someday end up on the cover of *Time* magazine, so I wrote that into the questionnaire. I didn't give it much more thought.

Day after day, I received inspirational messages from the Uni-

verse that put a spring in my step and a smile on my face. In a world where positive thoughts and feelings aren't often what one finds in an email inbox, the notes were a welcome respite from the typical business communications—encouraging and inspiring me along my journey.

About five months after subscribing, I opened my inbox to find the following message:

> Did you know, Joey, that your boldest dreams today, like a beach house and when you are on the cover of Time Magazine, will one day just be memories that make you smile, like learning to read, riding a bike, and Hula-Hooping.
>
> Dang, you're so "on it" this lifetime.
>
> Your biggest fan,
> The Universe[3]

Here we were, 129 days later, and the Universe had sent me an inspirational message specifically tied to one of my goals!

When I first read the message, joy and excitement crept over me as I thought, "Oh my gosh, the universe really does have this in store for me. This is actually going to happen someday!"

It wasn't until several hours later that I remembered *I had shared this piece of information as part of the Assess phase when I signed up to receive these emails.*

Preframing creates a stunning effect when a customer gets an emotional return later in the relationship. It makes the customer feel heard and understood, and that's exactly what happened to me with this particular Note from the Universe.

Even though *I* was the one who told them about the *Time* magazine

cover, they remembered and fed that information back to me later. While it was a computer that created this personalized experience, it didn't feel that way to me.

I felt special. I felt important. I felt that I mattered.



Quick Takeaway

If you want to know about your customers, it's okay to just ask. Once they answer, you *must* use this information to make their future experience and interactions more personalized and meaningful. That means recording the information in a customer relationship management tool and then making sure to circle back to it later in the relationship.

THE PERILS OF PREFRAMING: WHEN EXPECTATION SETTING FALLS APART AFTER THE SALE

Preframing is a great tool to enhance the Assess phase and give the customer a glimpse into their future experience. However, when the expectations set in the Assess phase aren't met—whether due to the sales representative's exaggerations, their lack of policy/process knowledge, or simple oversight and failure to communicate something important to an account representative—the entire relationship is negatively affected.

You know what I'm talking about.

We've all had the experience where we explain to the salesperson *exactly* what we're looking for and they tell us the product or service is perfect to meet our desires.

But after we become a customer we realize what we told them we needed isn't part of the deal. We're hurt. We're frustrated. We're mad.

And sometimes we want to get even—launching a tirade on social media or in our conversations with friends and colleagues.

By the time we realize the early conversations were at best forgotten and at worst ignored, the salesperson from the Assess phase is no longer in the picture. Instead, we find ourselves in a conversation with a paid-by-the-hour, unhappy call center representative, trying to figure out why the promises made during the sales process aren't being fulfilled.

I experienced this firsthand recently when I lost my wedding band.

Anyone who has ever lost a wedding ring knows what a trying and sad experience this is. In addition to my wife's very understanding and nonjudgmental reaction, the small glimmer of light for me in this otherwise dark time hinged on the fact that I had purchased insurance for the wedding band.

I opted for the "show me the money" clause (my words, not theirs). It was my understanding that because I submitted an appraisal of the ring's value when I signed up for the policy, and because my policy was tied specifically to that amount, and my monthly premiums were based on that specific amount, I would *receive* that specific amount (with no depreciation—or appreciation, for that matter) in the event that I made a claim.

After spending weeks looking for my wedding band to no avail, I contacted the insurance company and made an official claim. The agent I spoke to on the phone was very polite and, after taking down the details of my loss, said, "The only other thing we need is an appraisal on the value of the ring."

I was caught off guard. "When I originally signed up for this policy about seven years ago, I submitted an appraisal from the jeweler, which should be part of the official file," I explained.

"Oh . . . I'm sorry, I'm not seeing that in our records, can you resubmit it?" the representative asked.

Ugh. Fine.

I called the jeweler who originally sold me the ring and got her to resend the original appraisal to me (thankfully, she still had it in her records). I then passed the appraisal on to the insurance agency.

The next day I received a call from the insurance agent. She quickly shared that my file had been processed and they "would like to replace the wedding band."

"That sounds great," I said. "I'd like to take the ring settlement payment for the amount it was insured for when I purchased the policy. You can just send me a check and we'll be all set."

"Okay," the agent replied. "However, the settlement will be forty-five percent of the insured value. Your appraisal was really inflated and that's not how much it would cost to replace the ring. We can either mail you a ring from our 'preferred jewelry supplier' or we can send you a check for the settlement value we're offering. It's up to you."

The sadness, frustration, and anger that I felt the day I lost the wedding band came flooding back and was now magnified by a factor of ten.

"No, no, no," I said, trying to keep calm. "When I originally signed up for this policy, I specifically requested a rider that would cover *actual appraised value*—not replacement value. I wanted to make sure that should my ring be lost, I could repurchase a ring of the same quality and craftsmanship, fashioned by the same jeweler who helped me personally design and select my wedding band. That's what we agreed upon, that's what the agent told me, and that's why I've been paying monthly premiums for seven years as an insurance policy against this very thing happening!"

"I'm sorry our salesperson misinformed you," the agent replied. "They really need to do a better job of explaining how this works."

Are you kidding me? After *seven years* of paying premiums, this is what I get when I file my very first claim?!

I won't bore you with the details of what transpired after that, but I will share that I learned two important lessons from this awful experience:

First, I immediately went out and found a new insurance agency to carry my property insurance. After seven years of paying monthly premiums, I left the first company because their behavior showed me they didn't care about me as a customer.

Second, I learned that when a salesperson fails to explain to the company what the customer wants, it can be devastating. When things go wrong, the customer is guaranteed a horrible experience.

The complete lack of handoff between the salesperson who sold me the insurance and the account manager who processed my claim was astonishing. The carefree and callous way the agent placed the blame on the salesperson for failing to explain the terms of the policy added insult to injury. Imagine the difference in my customer experience if the salesperson and the account manager communicated with each other. What if everyone on the team clearly understood my primary goal in purchasing the insurance? What story would I be telling now if the expectations I outlined in the Assess phase were actually met by the insurance company?

In this instance, the insurance company became a case study of what *not* to do, which is referenced in a book on customer experience and featured during my keynote speeches on stages around the world. I haven't shared the name of the insurance agency, but if I did, I promise you it would rhyme with Fiberty Futual.



Quick Takeaway

Honor the agreements you make in the Assess phase. Make sure the salesperson communicates the company's offering accurately to the customer *and* communicates the customer's desires to the company.

SUMMARY: PHASE 1—ASSESS

Creating Remarkable Customer Experiences in the Assess Phase

In the Assess phase, the prospect is considering whether or not to purchase your service and/or product offerings.

Potential assessment activities include evaluating your website, researching testimonials, considering online reviews, and reviewing your marketing materials. This period of time can vary from a few seconds (for an impulse buy at the checkout counter) to several months (for a large, multimillion-dollar software installation).

Most businesses are structured to make smooth handoffs between sales/marketing and account management almost impossible. Focusing on getting the sale isn't enough. You need to connect with the prospect, meet them where they are, and then follow through with a preview of what the experience will be like after they become a customer.

The Assess stage of the customer life cycle offers you the opportunity to preframe the prospect's expectations to be in alignment with your business operations. Not only does this offer the chance to create a remarkable experience early in the relationship, but by showing a prospect what they can expect as a customer, you set expectations while at the same time hinting at the good things to come. This helps combat any fears a customer has that your company lets customers fall through the cracks once they've handed over their money.

THE SIX WAYS TO COMMUNICATE IN THE ASSESS PHASE

Remember, you don't have to use every communication tool in each phase. Instead, just consider that it's *possible* to use each tool to create a memorable experience for a prospect during this phase.



IN-PERSON

Establishing a face-to-face interaction at the beginning of the relationship can set the tone for future interactions while also giving you an early read on the prospective customer. Product demonstrations, "try before you buy" scenarios, and pitch meetings get you in front of the prospect early in the relationship and allow them to see your product or service offering in action.

Finding ways to look your prospect in the eye gives you incredible insight into their thinking, reactions, and emotional state when considering your products and services. The chance to connect, human to human, is often overlooked in an increasingly digital world—making any effort to create in-person connections that much more impactful and rare.

CHAPTER EXAMPLE: An in-person seminar (Wealth Factory) gives prospects the opportunity to assess the expertise of the team and the overall customer experience before signing up for the program.



EMAIL

An educational email sent to prospects helps them learn more about your product or service offering by focusing on the educational aspects of your brand as opposed to just sales. In addition, email communications give you the opportunity to begin a dialogue with potential

customers, which allows you to answer questions in advance and help them evaluate their options.

Taking care to gather any information the prospect shares during the exchanges gives you the chance to reflect that information back to the individual after the sale and prove that you were listening.

CHAPTER EXAMPLE: Properly designed intake questions (Notes from the Universe) offer the chance for a "wow" interaction in the future when the organization shares that personal information back with the customer.

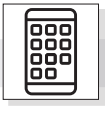


MAIL

Free educational newsletters and postcards can be sent to prospects to help them during their evaluation process. In the Assess phase, these mailings should focus on education as opposed to the typical hard sales pitch.

Free samples (where appropriate) allow the prospect to sample your offerings, reducing the risks associated with purchasing. The ability to customize mail pieces to the individual recipient further emphasizes a level of personal care and consideration.

CHAPTER EXAMPLE: The arrival of an unexpected FedEx package (Corporate Executive Board) gains immediate attention and emphasizes the level of care and attention to detail that is to come when joining a for-profit think tank's membership.



PHONE

Phone validation assists prospects in assessing your brand in a number of ways. By offering "call me now" features and free "ask the expert" call-in sessions, prospects can have questions answered directly by trained customer service members as opposed to salespeople.

Recording any concerns raised during these calls in the customer's record or file, as well as the answer provided in response, avoids future conflict by ensuring that expectations set during the sales process align with the experience delivered after the sale.

Educational teleseminars or recordings provide another way for prospects to sample your work, learn more about your offerings, and assess whether you will meet their needs.



VIDEO

Video brings a brand to life during the Assess phase of the customer life cycle. Short educational videos explaining your product and service offerings will answer prospects' questions and address any objections.

Videos can preframe the experience prospects can expect once they become customers. By "showing" the prospect what it will be like to work with you, videos give the customer a clear and specific understanding of future interactions.

Video communications can allow prospects to "meet the rest of the team" early on in the process—instead of just interacting with the salesperson.



PRESENT

Most prospects don't expect a free gift or present, which is why using this communication tool is often such a huge hit in the Assess phase.

When thinking about a present, go beyond the usual "free sample" of your product. While that is certainly an option, it doesn't usually feel like a present. To get around this hurdle, product and service businesses alike can offer associated gifts by partnering with similar or associated businesses. That way, the gift doesn't feel self-serving and yet is still

relevant to the prospect's current wants and needs. A personalized gift will have a much greater impact on the prospect's experience and shows a level of commitment to the relationship right from the start.

CHAPTER EXAMPLE: Surprising your customers with gifts that demonstrate you did your homework in advance (Wealth Factory), or paid attention in an early conversation (Corporate Executive Board), helps to create a long-term fan before they even have the chance to sample the business's offerings.

YOUR ASSIGNMENT: PUT THESE IDEAS TO WORK

At the end of each chapter, I encourage you to immediately put what you learned and the ideas you had to work by answering a series of questions designed to get you thinking about how to use each tool to enhance the experience in this phase of the customer journey. You'll be tempted to skim them and move on to the next chapter, but to receive the greatest return on the investment you just made in reading the chapter, please take fifteen minutes to write answers in response to this series of questions. Don't worry—despite what you may have learned growing up, it's okay to write in this book!

Evaluating the Current Situation

Answer each question, then write two or three sentences explaining your answer. For bonus points, write down any ideas you have for changes that would make your answers "better."

- When prospects review your marketing materials, do they get a good idea of what their experience is going to be like if they become

customers (not what they will receive from doing business with you, but how they will *feel* when doing business with you)?

- How long does the typical prospect assess your product or service before becoming a customer?
- Does your sales team effectively and accurately record customer desires and needs?
- Does your sales team effectively and accurately share customer desires and needs with the individual(s) responsible for maintaining the relationship once the sale is made?
- Do prospects receive a detailed and accurate preview of what the experience will be like after becoming a customer?
- Do you preframe the prospect's expectations to be in alignment with your business operations?
- Do you create remarkable experiences during the Assess phase?
- If so, what are they?
- On a scale of 1 to 10, where 1 is "pathetic" and 10 is "world class," how would you rate the experience your prospects currently have in the Assess phase?

Tools to Enhance the Future Experience

Answer each question by coming up with two or three ideas for using the specific tool to enhance the customer experience. For now, don't worry about how much it will cost, who will do it, or how to get it implemented in your organization. Dream big and be creative without limiting your options!

- How can you use in-person interactions during this phase to give a prospect a taste of what it will be like to interact with you after they become a customer?
- How can you make your emails more informative and informational—instead of being filled with marketing and sales speak?
- How can a customized mail piece stand out and get the prospect thinking about you in an unexpected way?
- How can phone conversations augment the sales process by introducing prospects to people in your company *other than* the salesperson?
- How can videos create personal and emotional connections between a prospect and the rest of your team?
- What present(s) could you give prospects that would really wow them?

Pick One Now

If you've answered the questions above (I hope you're not just reading along—seriously, slow down and answer the questions!), you have a clear understanding of the prospect experience during the Assess phase, as well as many ideas for how to make that experience better. Taking that into account, consider the following questions.

- What is one thing you can start doing tomorrow to make the experience your customers have in the Assess phase even better?
- Who would you need to talk to in order to make this happen?

- How would you know if you've succeeded in making this improvement?
- How would you measure the impact of the improvement on the overall prospect experience?
- How would you share this impact with the rest of the company?

FROM ASSESS TO ADMIT

Now that you have a clear understanding of what your prospect experiences in the Assess phase, let's consider what happens when they admit that they have a problem and think you can help.