



DAY  
100

# **Never Lose a Customer Again Quick Start Kit:**

*Start Keeping More of  
Your Customers By  
Giving Them  
Remarkable  
Experiences in the  
First 100 Days<sup>®</sup> of the  
Customer Relationship*

Joey Coleman  
[www.JoeyColeman.com](http://www.JoeyColeman.com)

# Thank you... and enjoy!

Thanks so much for purchasing my book, *Never Lose a Customer Again* - and for reading all the way to page 299 to see this offer for a *Quick Start Kit*!

This *Quick Start Kit* outlines the key elements of The First 100 Days® process I share in the book and should serve as a handy reminder of what you've already learned. In addition, I hope the *Quick Start Kit* works as a reference guide to assist you in implementing the methodologies, systems, and recommendations I share in the book.

In the pages that follow I recap the 8 phases your customer has the potential to go through as well as the 6 communication mediums you can use when working to create remarkable customer experiences.

I then dive into a series of worksheets that recap what is happening in each of the 8 phases of the customer journey and share ideas for how you can use the 6 communication tools to make each phase special for your customers. Each phase gets a one page overview and list of best practices/ideas, followed by a worksheet waiting for you to brainstorm specific application of these principles in your business.

The worksheets are where things get really interesting. Building on the ideas I share on the previous pages, challenge yourself to come up with fun and creative ways to create new interactions with your customers in each phase of the customer journey. In this brainstorming process, you should strive to create at least one idea for each of the 6 communication tools. Don't worry about the expenses, the likelihood of implementation, or any other "limiting beliefs" that may impinge on your creativity. For now, we're just imagining fun and creative ways to create connection with your customers.

After you've completed the worksheets, review the "answers" or list of ideas you've developed for each phase and then pick the one you think has the most promise. Do whatever it takes to implement that idea in your organization and once you've added at least one touchpoint/idea to each phase in your customer's journey, evaluate how much the overall customer experience has improved. If you want to enhance it even more, go back to the list again and select another great idea/touchpoint for each phase - and implement those!

Doing this exercise again and again will result in an ever-evolving customer experience. It will keep your customers (and your employees) engaged and excited about their interactions with your business.

I hope you find this *Quick Start Kit* useful as you work to put what you've learned in the book into practice. I wish you the best of luck as you enhance your customers' experiences in *The First 100 Days* and beyond!

A handwritten signature in black ink that reads "Joey". The signature is stylized with a large, looped 'J' and a cursive 'oey'.

P.S. Please don't hesitate to reach out ([joeyc@joeycoleman.com](mailto:joeyc@joeycoleman.com)) if you have any questions and please keep me posted as you implement new interactions with your customers. I'd love to hear how it works out!

# The 8 Phases of the Customer Lifecycle

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**Assess**

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**Admit**

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**Affirm**

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**Activate**

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**Acclimate**

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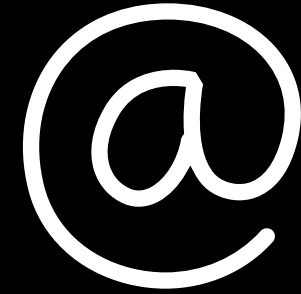
**Advocate**

**Note:** The specific day when your customers enter a phase, and how long they stay in that phase, depends on your particular industry, business operations, and customer personas - hence the # sign. This means you'll need to figure how the different phases align to the customer lifecycle journey and the calendar in your particular organization.

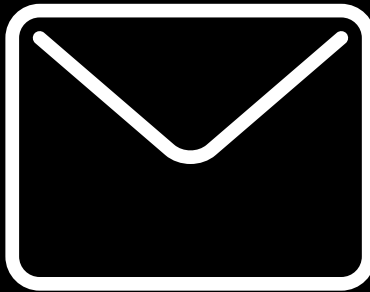
# Six Ways to Communicate in the First 100 Days



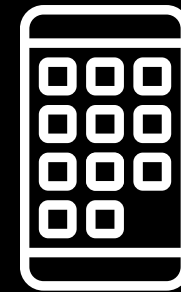
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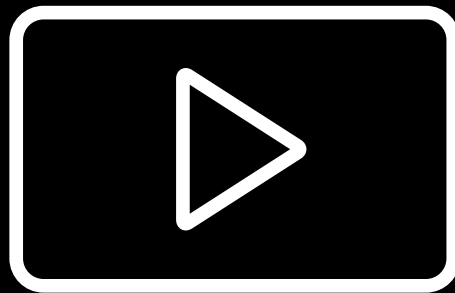
***Email***



***Mail***



***Phone***



***Video***



***Present***





# Assess

The **Assess** phase of the customer experience occurs in the time leading up to DAY 1 - The Purchase. In the Assess phase, the prospect is considering whether or not to purchase your service and/or product offerings. Potential assessment activities that a customer might take include evaluating your website, researching third party evaluations of your product/offering, considering online reviews, and reviewing your marketing materials. This period of time can vary from a few seconds (for an impulse buy at the check-out counter) to several months (for a large, multimillion dollar software installation) - depending on the individual prospect's pre-conceived notions about your company in particular, and your industry/market segment in general.

The Assess phase of the customer lifecycle offers you the opportunity to set the prospect's expectations to align with your business operations and *The First 100 Days* experience they will have if they decide to transition from being a prospect to being your customer.



While not applicable to all businesses, an in-person, live demo walk-through allows a prospect to see your product or service offering in action. The chance to connect, human-to-human, is often overlooked in an increasingly digital area - making any efforts to create in-person connections that much more impactful and rare.



An educational email sent to opt-in subscribers (pre-purchase) allows them to learn more about your product or service offering by focusing on educational aspects of your brand as opposed to just sales. In addition, email communications afford you to the opportunity to being a dialogue with customers - answering their questions and helping them to evaluate their options.



Free, educational newsletters and postcards can be sent to prospects to help them during their evaluation process. These mailings should focus on education and avoid hard sales pitches. In addition, free samples (where appropriate) allow the prospect to "try before they buy" - reducing the risk of purchasing.



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 will be able to have their questions answered directly by trained customer service members as opposed to sales people. Educational teleseminars/recordings provide another way to assist prospect assessment.



Video brings a brand to life during the Assess phase of the customer lifecycle. Short, educational videos explaining your product and service offerings will not only help to answer prospects' questions and address their objections, but can pre-frame the conversation for once they become customers. Additionally, it allows prospects to "meet the team" early on.



At the prospect stage, no one expects a free gift or present - which is why using this communication tool is often such a huge hit! When thinking about a present, free samples are a good possibility for product offerings. Product and service offerings alike can also offer associated gifts to prospects by partnering with similar businesses - that way the gift doesn't feel overly self-serving.



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brainstorm  
your ideas  
and insert  
them here

# Admit

The **Admit** phase of the customer experience occurs when the prospect transitions to customer by giving you their hard-earned money. They “admit” they have a problem that they think you can solve. This triggers the start of *The First 100 Days* with Day 1 - The Purchase. At this point in the lifecycle the customer feels a sense of hope and possibility for the results they will attain with your product and/or service offering. A chemical reaction in the brain affirms their choice with a dopamine release - producing an energy high that may or may not be perceptible to the customer.

The Admit phase of the customer lifecycle offers you the opportunity to capitalize on the euphoria associated with the purchase and begin the relationship with the customer by exceeding their expectations at the instant the relationship begins.



In person celebrations offer a fantastic opportunity to connect on a human level. The energetic exchange that occurs when we interact with a person who is genuinely excited about the possibilities of working together and thankful for the opportunity to do so, starts the relationship off on a positive note.



An email that is personalized and signed by the entire team (as opposed to a stock thank you) allows you to thank the customer for their purchase and for their trust. This communication also begins to re-enforce the brand's core values and voice/spirit by using unique and focused language.



A personalized, handwritten thank you note sent the same day the order is placed offers yet another surprise interaction for a new customer. Since most businesses never thank their new customers - let alone in writing - a mailed piece further distinguishes your brand from the competition.



Individual thank you calls within 24 hours of a purchase dramatically differentiate your brand from almost every other business. A personalized call offers the opportunity to acknowledge the purchase, thank the customer for their trust, and answer any additional questions they may have. A high energy, short voicemail message creates a great touchpoint as well.



A short, “Welcome to Our Family” video from the team can be sent to new customers shortly after their purchase. In the ideal, this video has a very homemade feel, is customized for the specific customer, and captures the gratitude for the opportunity to work together. It should also exude excitement about the relationship ahead.



An unexpected treat to start things off on the right foot is always well received. Coupons for future purchases and company-branded promotional products are not gifts - at least not for the customer. Instead, focus on a thoughtful symbol of appreciation that has a perceived value commensurate with the perceived lifetime value of the relationship.



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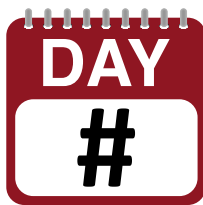
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# Affirm

The **Affirm** phase of the customer experience begins in the minutes and hours after the purchase and can last for weeks. Despite the positive dopamine release that occurs at the moment of purchase (the Admit phase), things begin to deteriorate in short order. An underlying current of doubt starts to counter any positive feelings. The longer this buyer's remorse goes unmitigated, the faster the customer's mood deteriorates and the more anxiety grips the customer's emotions. The "quiet zone" between the purchase and the delivery of your product/service further exacerbates the problem as the void in communication is filled by the customer's self-doubt.

The Affirm phase of the customer lifecycle offers you the opportunity to counter the natural feelings of buyer's remorse by reinforcing the purchase decision and reaffirming the elements of the offering that initially contributed to the customer's purchase.



Often the mere presence of a representative from the company can assuage any buyer's remorse. Just knowing that someone at the organization cares and is focused on a new customer often provides a level of reassurance that can carry that customer into the next lifecycle phase feeling good about their purchase.



A "breaking news" third party testimonial or case study offers validation of the purchase decision and can be paired with a message noting the customer's "wise choice" to help mitigate any feelings of buyer's remorse.



A mailed case study of a similarly situated customer, combined with a personalized note, can show the new customer what is possible now that they are working with your organization. A message along the lines of "we hope to have even better results with you" can further reinforce the team's excitement about working together.



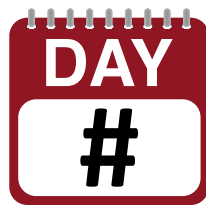
A call from a senior member of the management team further affirms the purchase decision by delivering a "you made the right choice" message with a "we care about you at the highest level" message. In addition, a call from another customer, welcoming the new customer to "the family" begins to foster interactions between existing customers and new customers.



A brief "Keep the Faith" video can be emailed to new customers between the time they place their order and when the order is "received" or the service is first delivered. This video reaffirms their purchase decision, subtly referencing some of the key benefits and rationales the customer cited during the sales process as to why they needed this specific product or service.



By offering a free, unexpected upgrade during this time frame (faster shipping, free samples, preview of product before release, etc.) you can begin to over-deliver on the customer's expectations. This type of bonus is easily factored into the business operations as a pass-through expense without bottom line impact - and yet the perceived value to the customer is tremendous.



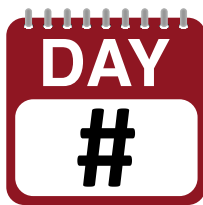
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# Activate

The **Activate** phase of the customer experience occurs when the customer receives the product or starts to experience the service they purchased in their initial transaction with your business. This first impression (physical and emotional) sets the tone for future interactions and creates a baseline emotional reaction to your brand experience. The customer explores and digests any materials associated with this product or service more closely than any future package as they have anticipated the arrival of this initial shipment and/or this first meeting. Think of the energy you need to bring to “activate” the relationship and create a great mindset for creating remarkable customer experiences.

The Activate phase of the customer lifecycle offers you the opportunity to set the standard for future interactions, while at the same time welcoming the customer to your brand/community. The main goal of this interaction is to get the customer to take a first action that is designed to increase the likelihood of continued and repeated use going forward.



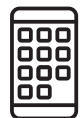
In person interactions at this phase in the customer lifecycle should be well-thought out, prepared for, and extremely positive. High energy exchanges, coupled with sincere connection and a sense of welcoming hospitality make an indelible mark on a new customer during their first key interactions.



Email communication the day the customer receives their first product or service should address their emotional state as well as provide clear, concise directions for maximizing the customer’s potential for success. Customization and personalization are key to creating a feeling of uniqueness and care from the outset of the first delivery or interaction.



Depending on whether you offer a service or product, the mail can be used to create a special interaction. For services, a printed process map and success checklist in the initial interaction offers a tangible artifact of the brand experience and helps to build kinesthetic learning and behaviors into the process. For a product offering, enhanced packaging will get things off to a great start.



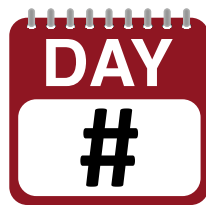
A follow up call confirming receipt of the product on the day it arrives - or checking in during a service call to make sure things are going exceedingly well - offers a personalized touch to further anchor the brand experience. This call will also allow you to preemptively identify any problems with the initial order or service delivery - providing the opportunity for fast resolution.



A personalized, customized video helps bring a WOW moment to the first interaction - especially if that video includes team members that may not be directly involved in the project yet or who contributed to the initial delivery of the product or service. A video helps to put a human face on the interaction at this key moment in the customer lifecycle.



In the tradition of the Cracker Jacks’ “Free Prize Inside,” the first shipment or exchange should include something special and unexpected. Potential prizes include: a sample of a product that wasn’t in the order, a sample of a product that hasn’t been officially released yet, or a card with a link to download a free tool that increases the likelihood of success.



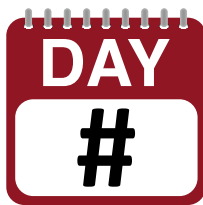
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your ideas  
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them here*



# Acclimate

The **Acclimate** phase of the customer experience occurs in the time period between receipt of the first product or service, and the time when the customer has a sense of comfort using your product or service. During this phase, the customer will be learning the ropes as well as potentially interacting with your team members and additional product and/or service offerings. The goal in this time period is to get early buy-in and habit formation before the novelty wears off and/or the customer slips back into old behaviors. Think of acclimating at altitude and be ready to hand customers your own version of an oxygen bottle to make their transition smoother and more comfortable.

The Acclimate phase of the customer lifecycle offers you the opportunity to introduce customers to the organization's culture, processes, and systems in a way that encourages them to adapt to this new environment.



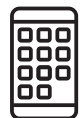
Lending a friendly hand as a customer navigates using the product or service is key in the Acclimate phase. By now, the customer understands most basic operations/interactions, but is probably aware of nuances that weren't addressed in the early stages. By being regularly present, the brand can help address these and increase the customer's comfort and experience.



By tweaking the sequence of additional orders/meetings/interactions to include regular check-ins on customer progress, the communications with customers can transition from a one-way, push mentality to a more fluid dialogue. Quick email surveys to individual customers allow for deeper segmentation, targeted assistance, and the identification of defection indicators over time.



As most businesses move into the Acclimate phase, direct mail communications slow and often cease - except for sending invoices and upsell flyers/catalogs. Instead of being in sales mode, use mail to send unexpected tools to help the customer succeed. Use this opportunity to further deepen the customer's understanding of your brand, your culture, and your core values.



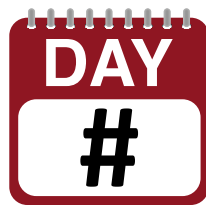
A group call/teleseminar provides the opportunity for new customers to get personalized coaching or suggestions on how to experience early success with the brand. This clear commitment to the new customer's success establishes an immediate sense of accountability and support and helps to acclimate them to these new business interactions.



A video from an expert (senior management, project lead, etc.) congratulating the customer on being halfway through the project process as they move toward their goal/final outcome will enhance the relationship while showcasing the personal commitment to the customer's success. This also offers the chance to anchor customer behaviors to the brand mission.



Surprise gifts and bonuses as the customer becomes more familiar with the brand help to keep the interactions exciting and engaging. Anything that would make the experience smoother, easier, or more efficient offers the chance for a surprise at this stage in the customer lifecycle.



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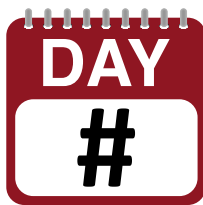
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# Accomplish

The **Accomplish** phase of the customer experience occurs when the customer achieves the result they were looking for when they first decided to do business with you. This may be the time they use your product and achieve their desired impact, or the time that your service delivers on the hopes they had when they first signed up to work with you. During this phase, the customer's initial expectation for the end result is met - something that doesn't happen with every product or service. By clearly identifying the customer's initial goal, and then delivering that result in the Accomplish phase, you are able to deliver on the brand promise shared at the beginning of the relationship.

The Accomplish stage of the customer lifecycle offers you the opportunity to acknowledge the significance of this milestone, celebrate the achievement, and in the process, remind the customer that this was the result or outcome they were seeking all along.



Taking the time to celebrate the fact that the customer achieved their initial goal honors this milestone and reinforces its significance. Hosting a party for the entire team or simply raising a glass in celebration with your main point of contact marks this moment as a memorable event, reminding the customer that the initial desire(s) came true with your product/service.



An email congratulating the customer on reaching this result helps to acknowledge and honor the Accomplish phase. Highlighting the various steps along the path the customer travelled to reach this point further establishes the significance of the moment. With certain products or services, reaching this phase can be memorialized with a badge or certificate.



A handwritten note, marking the accomplishment of the customer's desired goal/impact, creates a lasting memento of the occasion. A celebratory card allows for the expression of heartfelt congratulations while at the same time showing the customer that the company was very aware of the desired result and the fact that the result was obtained.



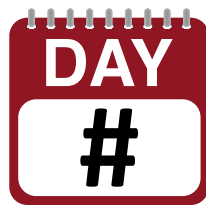
A congratulatory call and conversation shows the customer that the company was aware of the customer's expectations and that they join in the celebration of accomplishing this feat. Genuine words of praise allow for the acknowledgment of the journey to date (noting both ups and downs) and help set the tone for any future interactions.



A congratulatory video from the entire team allows for this milestone to be marked and celebrated at the same time. Making sure that the brand spirit/energy comes out in this video further cements the relationship and makes it clear that the customer's success in achieving the desired result is in direct alignment with the company's desired impact for the product or service.



The familiar practice of celebrating milestones and accomplishments in an individual's personal life makes transitioning this practice to the world of business fairly simple. Gifts that acknowledge the journey or the end result further establish the importance of the moment. Celebratory food and drink can enhance the accomplishment and bring people closer together.



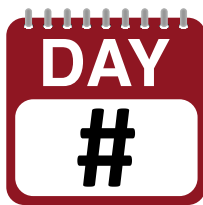
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# Adopt

While many businesses stall out just before reaching this phase, the **Adopt** phase of the customer experience usually occurs when the customer fully embraces your brand philosophy and practice. At this point, the customer has formed habits around your products and services and is seeing more significant results. In addition, they are likely experiencing improvements in ancillary and unexpected areas of their business and/or personal life as the result of your product or service providing the promised outcomes.

The Adopt stage of the customer lifecycle offers you the opportunity to formalize a long-term relationship that goes deeper than a once-and-done purchase decision and results in the customer seeing you as an important or even indispensable partner.



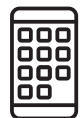
By the time the customer reaches this phase, they should have already experienced personal interaction with brand representatives. If not, at this point a concerted effort to connect on a personal level will augment the overall brand relationship. Special training sessions and non-work-related outings provide the chance to deepen the interactions and communications.



A more in-depth “success survey” allows for significant data collection about the individual customer to be used in personalizing future communications. In addition, larger data sets from these surveys will allow for the identification of trends within the customer base and could potentially alter early sales messages, systems, and processes for future prospects.



“Expert User” guides and veteran tips help seasoned customers to further adopt the product or service offerings. Now that the customer has taken on a sense of personal ownership for the use of the product or service, they are ready for the most advanced interactions and usage cases to truly maximize their success.



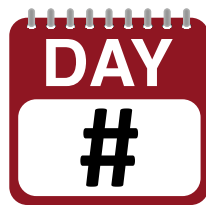
A personal call from a very senior executive acknowledging this milestone and speaking to specific success markers reinforces the brand’s commitment to the success of individual customers. These conversations also offer insight into customer behaviors and habits - which can be used to adjust customer communications going forward.



A key milestone/anniversary celebration video showing the entire team celebrating the customer’s “## Day Commitment to Success” offers the chance to showcase the brand spirit while also acknowledging this important milestone in making a long term, behavioral change.



A memento or artifact commemorating this significant milestone offers an unexpected surprise. By welcoming the customer into the highest echelon of active customers, you place a great degree of significance on their contribution to the overall success of the brand, while in the process giving them a sense of ownership over the relationship/engagement.



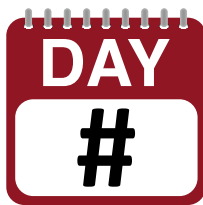
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# Advocate

The **Advocate** phase of the customer experience can occur at any time in *The First 100 Days*, but has a tendency to accelerate after Day 100. While customers may be raving fans before this, the anniversary offers a logical time to celebrate customer successes and ask for referrals. Because of the customer's extensive personal experience after 100 days, testimonials are more meaningful and the results of using your products or services are more easily quantified and qualified. In addition, the customer has established enough trust in your company that they will be more likely to share their network with you for potential leads and referrals.

The Advocate stage of the customer lifecycle offers you the opportunity to strengthen bonds with existing customers while using their case studies and testimonials to promote the benefits of an ongoing commitment to new, prospective clients.



Inviting key customers to come on sales calls, meet other customers, and mingle with prospects is a way to have your best customers become your best salespeople. By creating unique and engaging reasons to participate (private learning session, special event, etc.) customers will be eager to attend, and will likely transfer those positive feelings into their conversations.



A comprehensive "100 Day Progress Survey" will formally mark the conclusion of *The First 100 Days* of the customer lifecycle and further establish base metrics for customer success. In addition, if properly positioned, the survey reinforces the brand's commitment to the customer's success and kicks off the next 100 days of the relationship.



The arrival of a free gift in the mail allows for a unique touchpoint (especially this long into the relationship) that marks the customer's 100 Day Achievement with a signature communication, memento, or artifact. This communication should be highly personalized, hand-written, and feel as if it was custom-made for the recipient.



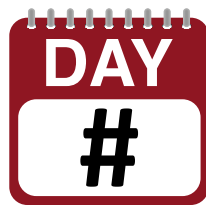
A congratulatory call from the CEO or Chairman of the Board will emphasize the importance of the 100 Day milestone and provide a purely supportive (i.e., non-sales-driven or promotional) communication to cap *The First 100 Days* of the customer experience. This interaction offers the brand the chance to again thank the customer for their ongoing patronage and support.



Asking customers to share video testimonials will not only be appropriate given the length of the customer relationship, but it will have a greater chance of gleaning positive testimonials as the active customers will have 100 days of personal experience with the brand. Prizes for the most creative videos and showcasing them in various brand channels will increase video submissions.



A strong referral campaign at this point in the customer lifecycle is both appropriate and meaningful - especially to those who responded positively to the progress survey. By offering the most successful customers free products or services to gift to friends/colleague, the personal testimonial will take on entirely new meaning as they will be able to help their friends "sample" the brand.



# Advocate

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brainstorm  
your ideas  
and insert  
them here