

## Example: ABC Integration Company

### Who is Your Customer?

In the Force for Good System™, we invite you always consider your many constituents – customers, team members, partners, vendors, investors, industry, local community, larger community, and world at large

The two most critical are *those who buy* your products and services and *your team*.

- **Clients**, who exchange money for your services
- **Team members**, who exchange time, energy, and belief for a shared purpose

We invite you to see your Customer Experience as one that directly serves both your customers and your team.

*Focusing on both creates a company people cherish—inside and out.*

### Customer Experience

Customer experience is the total perception a customer (client or team member) has of your company, based on every interaction they have—before, during, and after a purchase.

It's not just about what you sell. It's about how people feel when they engage with your brand, your team, your service, and your values.

- A great customer experience builds trust, loyalty, and advocacy.
- A poor customer experience—often subtle or unintentional—can quietly erode growth, even when your product is strong.

### Elevate Three at a Time

**Three Customer Experience Improvements** is a continuous, purpose-driven *practice* of actively selecting and implementing three high-impact ways to enhance the experiences of both customers and team members—your two most important constituents.

This cycle of improvement keeps your company alive, aligned, and evolving. As one improvement is completed, another is added, creating a steady rhythm of innovation, care, and cultural vitality.

The question to always be asking:

**Which 3 experience upgrades—  
*big enough to matter, small enough to execute—*  
would transform your growth trajectory this quarter?**

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### Always Have Three

Your company is a living system—and improving the experience of those you serve keeps it thriving.

This Core Growth Element ensures you're always focused on *three concrete ways* to **elevate** both your *customer* and *employee* experience.

- These improvements can be bold innovations or simple changes—but they must create meaningful impact.
- As each one is implemented, another takes its place, creating a virtuous cycle of attention, creativity, and care.

### Review Often

**Reviewed monthly and quarterly**, these improvements become a strategic pulse that strengthens culture, loyalty, and performance across your company.

### The Process

- PART 1 – BRAINSTORM POSSIBLE IMPROVEMENTS
- PART 2 – MEASURE IMPACT & RESOURCES
- PART 3 – PLOT IMPROVEMENTS
- PART 4 – PRIORITIZE IMPROVEMENTS
- PART 5 – SELECT THREE IMPROVEMENTS

### Examples - Customer Experience Improvements (Clients & Customers)

**Welcome Experience Upgrade** - Personalize the onboarding journey with a branded welcome video, handwritten note, or curated starter kit.

**Create a Customer Success Guide** - Offer a step-by-step guide to getting the most out of your product/service.

**Simplify Billing & Invoicing** - Make your payment process faster, clearer, and aligned with customer preferences (e.g., mobile pay, ACH, autopay).

**Add Live Chat or Text Support** - Offer real-time help that builds trust and responsiveness.

**Customer Milestone Celebrations** - Acknowledge anniversaries, usage milestones, or birthdays with a small gift or heartfelt message.

**Customer Education Series** - Host monthly live or recorded tutorials, webinars, or Ask Me Anything sessions.

**Post-Purchase Thank You Notes** - Send a personal thank-you (digital or handwritten) after a major purchase or partnership begins.

**Revise Your Brand Voice & Messaging** - Use real customer language and stories to revise your website, proposals, and collateral.

**Add a Customer Feedback Loop** - Introduce short surveys after key moments, and act on insights.

**“First 30 Days” Onboarding Plan** - Guide new customers with a roadmap of what to expect and how to engage.

**Redesign Customer Journey Touchpoints** - Identify one stage of your journey that feels flat and upgrade it with emotional value.

**Loyalty or Referral Program** - Reward referrals with mission-aligned perks or meaningful recognition.

**Client-Only Strategy or Support Sessions** - Offer quarterly reviews or exclusive access to deepen connection and retention.

**“Surprise & Delight” Campaign** - Send unexpected gifts, tools, or messages to wow customers and build joy.

### Team Experience Improvements (Internal Team Members)

**90-Day Onboarding Redesign** - Craft a purposeful, warm onboarding that builds clarity, belonging, and momentum.

**Monthly Culture Rituals** - Introduce shared celebrations like “Win Wednesdays” or “High-Five Fridays.”

**Peer Recognition Platform** - Set up a simple system for teammates to shout out each other for living your Core Values.

**Weekly Team Huddles with Purpose** - Add a values-aligned moment, gratitude round, or impact story.

**Professional Development Stipend** - Offer each team member an annual budget for learning and growth.

**Core Values Awards** - Recognize team members who live your values through shoutouts or perks.

**Growth Plans for Every Role** - Make advancement pathways visible and personalized.

**New Hire Welcome Kit** - Include branded swag, a welcome letter, and a team video.

**Mental Wellness Check-Ins** - Add optional monthly 1:1s focused on well-being and energy.

**Equity Conversations** - Host quarterly conversations on inclusion, belonging, and justice in the workplace.

**Idea Wall or Slack Channel** - Encourage team members to share creative improvements in real time.

**Values-Based Onboarding Journey** - Introduce one core value per week during a new hire’s first month.

**Add a Team Impact Story to Weekly Meeting** - Start with a story of customer transformation or team success.

**Create an Internal Culture Guidebook** - A living doc that shares “how we do things here” rooted in your values and mission.

**Half-Day Monthly Focus Time** - Block a half-day each month for team members to focus on deep work or learning.

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PART 1 – BRAINSTORM POSSIBLE IMPROVEMENTS

In the table on the next page, brainstorm a laundry list of the many possible improvements you would like to make to employee and customer experience. Use these questions to help you generate ideas.

| Customer Experience Improvement Questions                                                                                                                                  | Team Experience Improvement Questions                                                                                                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. What new ideas do you have to attract prospective customers?                                                                                                            | 1. What new ideas do you have to attract prospective teammates?                                                                                                                |
| 2. What new ideas do you have to give prospective customers remarkable experiences of your company?                                                                        | 2. What new ideas do you have to give prospective teammates remarkable experiences of your company?                                                                            |
| 3. What new or improved ways could you enroll a prospect to become a customer?                                                                                             | 3. What new ideas do you have to invite or enroll a prospective hire to become a member of your team?                                                                          |
| 4. What new ideas do you have to create remarkable experiences while your customer is being onboarded?                                                                     | 4. What new ideas do you have to create remarkable orientation and onboarding experiences in the first 90 days of a new team member?                                           |
| 5. How could you improve the experience of signing agreements, invoicing, and collecting payments? How could you better align with customer wants, needs, and preferences? | 5. How could you improve the experience of initial hire paperwork, setting up payroll, and offering them benefits? What would make this initial experience remarkable?         |
| 6. How could you improve the process and experience of delivering the product or service to your customer?                                                                 | 6. How could you improve the experience of coming to work each day?                                                                                                            |
| 7. How could you improve the process and experience of resolving customer problems and complaints? What would create a “WOW!” experience for your customer?                | 7. How could you improve team member retention, engagement, and satisfaction? How can you empower them? Acknowledge them? Give them opportunities to advance, learn, and grow? |

# Three Customer Experience Improvements Selector™



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| Brainstorm your list of possible improvements here            | Impact<br>(1-4) | Required<br>Resources<br>(1-4) |
|---------------------------------------------------------------|-----------------|--------------------------------|
| <u>Client-Facing Improvements:</u>                            |                 |                                |
| "First 30 Days" Onboarding Plan with milestone tracker        | 4               | 2                              |
| Quarterly Client Strategy Sessions (virtual check-ins)        | 4               | 2                              |
| Personalized Client Dashboards with company-branded templates | 4               | 2                              |
| Live Chat Support staffed by integration specialists          | 3               | 2                              |
| Client Success Playbook for CFOs (PDF + video series)         | 3               | 2                              |
| Custom Reporting Templates based on board-ready standards     | 3               | 3                              |
| "Done-With-You" Setup Walkthrough led by a Success Coach      | 3               | 3                              |
| Voice of the Customer Program with quarterly surveys          | 3               | 3                              |
| Instant Integration Audit Report with recommendations         | 3               | 3                              |
| Annual Performance Review & Renewal Planning Call             | 3               | 3                              |
| <u>Team-Facing Improvements:</u>                              |                 |                                |
| Monthly team recognition based on Core Values                 | 3               | 2                              |
| Dedicated 'focus time' blocks with no meetings                | 4               | 3                              |
| 90-Day Team Success Program for all new hires                 | 3               | 3                              |
| Quarterly professional development stipends                   | 4               | 2                              |
| Automated weekly status dashboards per team                   | 3               | 3                              |
| Quarterly innovation lab for new team ideas                   | 4               | 3                              |
| Peer recognition platform                                     | 3               | 2                              |
| Build a culture book                                          | 4               | 3                              |
| Team Wellness program - weekly wellness activities            | 3               | 3                              |
| Growth plans for every team member                            | 4               | 2                              |
| 'Crucial Conversations' training for all team members         | 3               | 3                              |
| Implement a quarterly ½-day community service project         | 4               | 3                              |
| Implement annual team-building and planning retreats          | 3               | 2                              |

### PART 2 – MEASURE IMPACT & RESOURCES

Now that you've brainstormed a comprehensive list of improvements on the last page, consider your list of improvements along two scales:

1. **IMPACT** - What would be the level of impact your customer or employee would feel from each improvement? Rate each of your ideas from 1 to 4 (1 being low and 4 being radically transformative).
2. **RESOURCES** – What is the level of time, hours, and money that would be required to implement the idea? Some ideas are quick and easy. Other ideas will take more elbow grease. Rate each of your ideas from 1 to 4 (1 requiring the most resources and 4 being extremely resource intensive).

### PART 3 – PLOT IMPROVEMENTS

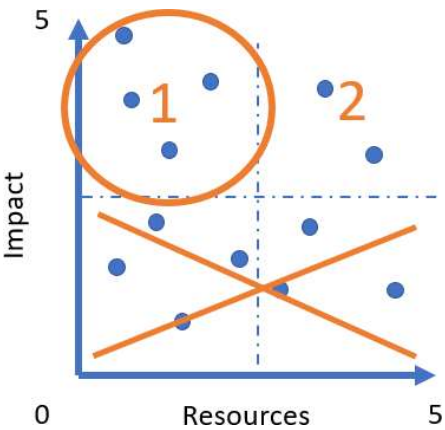
Identify which customer experience improvement goes into each of the four quadrants.

| High-Impact, Low-Resource Improvements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | High-Impact, High-Resource Improvements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• “First 30 Days” Client Onboarding Plan with milestone tracker (4, 2)</li> <li>• Quarterly Client Strategy Sessions (virtual check-ins) (4, 2)</li> <li>• Personalized Client Dashboards with company-branded templates (4, 2)</li> <li>• Quarterly professional development stipends (4, 2)</li> <li>• Growth plans for every team member (4, 2)</li> <li>• Client Success Playbook for CFOs (PDF + video series) (3, 2)</li> <li>• Live Chat Support staffed by integration specialists (3, 2)</li> <li>• Monthly team recognition based on Core Values (3, 2)</li> <li>• Peer recognition platform (3, 2)</li> <li>• Implement annual team-building and planning retreats (3, 2)</li> </ul> | <ul style="list-style-type: none"> <li>• Dedicated ‘focus time’ blocks with no meetings (4, 3)</li> <li>• Quarterly innovation lab for new team ideas (4, 3)</li> <li>• Build a culture book (4, 3)</li> <li>• Implement a quarterly ½-day community service project (4, 3)</li> <li>• Custom Reporting Templates based on board-ready standards (3, 3)</li> <li>• “Done-With-You” Setup Walkthrough led by a Success Coach (3, 3)</li> <li>• Voice of the Customer Program with quarterly surveys (3, 3)</li> <li>• Instant Integration Audit Report with recommendations (3, 3)</li> <li>• Annual Performance Review &amp; Renewal Planning Call (3, 3)</li> <li>• 90-Day Team Success Program for all new hires (3, 3)</li> <li>• Automated weekly status dashboards per team (3, 3)</li> <li>• Team Wellness program – weekly wellness activities (3, 3)</li> <li>• ‘Crucial Conversations’ training for all team members (3, 3)</li> </ul> |
| Low-Impact, Low-Resource Improvements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Low-Impact, High-Resource Improvements                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <ul style="list-style-type: none"> <li>• None identified in this group—all ideas are higher-impact</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <ul style="list-style-type: none"> <li>• None identified in this group—all ideas are higher-impact</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |



PART 4 – PRIORITIZE IMPROVEMENTS

And then determine which ideas to tackle first:



1. First focus on the ideas that have the greatest impact with the lowest level of required resources.
2. Next, move to the ideas that bring high impact, but increasing levels of resources.
3. Avoid ideas that bring little impact, even if they are low in resources. Aim instead to only do things that bring a high level of impact in shaping and improving customer and team experiences.

Using this logic, move to the next page to select your Three Customer Experience Improvements.

PART 5 – SELECT POSSIBLE IMPROVEMENTS

Hopefully, selecting three improvements will be easy now that you have brainstormed, rated them, and mapped them on impact and resource-intensity. Utilize these questions to help you make your choice.

- 1. Which three improvements will most transform your customer and employee experience?
- 2. Which ones will produce the biggest shift from transactional to transformational?
- 3. Which one will be most fun and engaging for you and your team to implement?

Select THREE IMPROVEMENTS you and your team commit to implementing over the next 90 days.

By this date, \_\_\_\_\_, we commit to implementing these three improvements:

Improvement #1

First 30 Days” Client Onboarding Plan with milestone tracker

Improvement #2

Quarterly Client Strategy Sessions

Improvement #3

Growth plans for every team member role