Masterclass - Three Customer Experience Imrovements

Coco: [00:00:00] Welcome to "**Design Loyalty Scale with Heart.--** *Discover the Three Experience Upgrades Your Business is Missing.*"

I am Coco Sellman, five time founder, impact investor, and creator of the Force for Good System(TM). Today we are talking about one of the most important topics related to growing and scaling your company of impact. I invite you to consider the experience your customers are having.

Is your Customer Experience truly remarkable?

Do your team members regularly turn routine movements into unforgettable ones?

What would it take for your Customer Experience to become your best marketing channel?

And what if just three experience [00:01:00] **upgrades --***big enough to matter, small enough to execute--* **could transform your growth trajectory this quarter?**

Today that is our topic. We are talking about the Three Customer Experience Improvements that can help you elevate connection with everyone you serve.

So who is your customer?

In the Force for Good System(TM), we invite you to always **consider the many constituents** of your company: *your customers, your team members, your partners, your vendors, your investors, your industry, the local community, larger community, and the world at large.*

Focus in on your most critical, and typically those most critical audiences are your **clients** [00:02:00] and your **team members**.

Your **clients** are the customer that you *exchange money for your services.*

Your **team members** exchange *time, energy, and belief for a shared purpose*.

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

What is 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 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, your [00:03:00] values.

A **great Customer Experience** builds **loyalty**, **trust**, and **advocacy**.

A **poor Customer Experience**, often *subtle* or *unintentional*, can quietly **erode growth** even when your product is strong.

Customer Experience is the *emotional journey* your company creates-- *one touch point at a time.*

Founders often struggle to create a remarkable Customer Experience.

First, it's **overwhelming** because there are so many touch points. We give up on the Customer Journey before we even get started. We just try to get the basics handled, get the product, get the service, get it out however we can. It's hard to think about Customer Experience because we worry that there's just too [00:04:00] much.

The team is already **overloaded.** You are wearing lots of hats. Your team's wearing lots of hats. How do you stop and think about these nebulous moments of your customer?

There's also oftentimes **not yet the systems** in place to empower **consistency**.

The way we approach Customer Experience within the Force for Good Model invites you to embark on **just three changes at a time**, which make it possible to *radically elevate without overwhelm.*

Three changes at a time. If every quarter you have three, over time you will build a remarkable experience. If you don't start somewhere, you will never get there.

This exercise today, will help you see where the **improvements will matter the most.** And it will actually be fun to implement them for your [00:05:00] team as well as for your clients.

What are the Three Customer Experience Improvements within the Force for Good Model?

Within the Force for Good Model, Three Customer Experience improvements is one of our Core Growth Elements. Every **Core Growth Element** is designed to **spark exponential growth**.

Having **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 your clients and team mates.*

Over time, this cycle of improvement keeps your company **alive**, **aligned**, and **evolving**. As one improvement is completed, another is added. Creating a steady rhythm of [00:06:00] innovation, care, and cultural vitality.

Your company is a living, breathing organism. It requires attention and oxygen to prosper. Three Customer Experience improvements help you stay at the forefront of those who serve, and always be **listening** and **understanding-- *how we can do better.***

Today's focus is on the Three Customer Experience Improvements. We're going to use the **Three Customer Experience Improvements Selector(TM).**

In our workshop, we have **three goals**. **Use the Selector(TM); define your Three Customer Experience Improvements;** and identify a habit and an action that will activate those Three Customer Experience [00:07:00] Improvements.

You'll embark on creating remarkable experiences for your team members and your clients.

If you haven't already, go ahead and download the three Customer Experience Improvement Selector(TM), which you can find this week at aforceforgood.biz/weekly-tool. It's also available when you buy the book, A Force for Good. It's part of the toolkit you get when you buy the book.

Where does this fit on the 4-Page Growth Plan(TM)?

The 4-Page Growth Plan(TM) is really the center of our ability to grow. It helps us answer the question, ***"How do we create success? What would make success the only outcome?"*** By using this 4-Page Growth Plan(TM) and gathering these nuggets of wisdom with each of the Core Growth Elements that we **unlock the puzzle of growth**.

Today we are focused on [00:08:00] this idea of three Customer Experience Improvements, and it's on the bottom right hand of the first page, under the **Know Who You Serve** section.

As we said before, you have **two audiences**.

You have your **clients** that *exchange money for transformation*, and you have your **team** who *exchange belief and effort for belonging*.

It's important to understand that great companies *improve both experiences continuously*.

In my experience, if you keep those two things separate, you never get around to your team. You always focus on the client. It's important to embed them together because they actually perpetuate one another.

It also elevates the value of every member of your team. It's saying, "*you team member, you matter*"-- so much that we're always going to be focused on *elevating* the experience we are delivering to *you*.

When we address both, it shows [00:09:00] to our team members that we see them just as importantly and as valuable as we see the client. It creates a culture of care from inside and to out.

Why you need Three Customer Experience Improvements?

Okay? So I like to think Customer Experience like being on a raft out at sea. You could swim out and be right in front of the Ritz-Carlton. The sun is shining. All is well. But if you stop paying attention and you stop improving over time, you'll find that you are downstream of the Ritz Carlton. You are no longer present in the mind of your customers and you've lost traction.

Continuously looking at where you can improve the experience of your customers, both your clients and your team, [00:10:00] **you'll be more likely to keep them**. Without it, you'll be losing them.

You also need it because your **culture will be shaped with or without you**. If you are not intentional with how you're building the culture of your team and your clients, then something else will emerge and it won't be good because unconsciously we all have fears. So it creates negativity without even knowing it. When you focus on what it is that you want to create, and then you actively do three things at a time-- *you make promises, and you fill them, you make promises, and you fill them*-- this creates a positive culture that people want to belong.

Stalled growth is often an experience problem. You might have a great product, but if you don't know what's really happening with your customer and where they are getting disconnected from you, then your growth is going to be limited.

Emotional [00:11:00] **resonance drives profitability.** People will stay if they feel connected to you. If they feel a sense of purpose, belonging, success, prosperity-- it's through the Customer Experience that they get to actually have that.

It creates a company people cherish. Don't you want to create a business that customers and team members love? Don't you want to create that place where people talk about what a great company is and what a unique culture it has? Don't you want to have a company where your employees thrive? And then in all future situations we'll look back and say, *"That was the best company, best position, best job I ever had!"*

It is through three improvements at a time you can get there.

Mistakes to avoid.

Treating Customer Experience as a one-time project rather [00:12:00] *than a living habit.*

Another Core Growth Element is the 17-Step Customer Journey. If you haven't done that masterclass, you may want to. But it's like saying, "*doing that once means you're done.*" You want to be always re-looking at your Journey because things change. New triggers are happening in the market all the time. New worries are happening with your employees and your team members. Being able to stay fresh helps everyone stay engaged.

Only improving for paying customers and not team members is another big mistake.

It speaks volumes about what we actually value. It's a big mistake to put them separately and never get around to the team.

The other mistakes we want to avoid is optimizing for process over emotion.

So we look at process and we look at efficiency, right? We want that. However, it's [00:13:00] important we also gauge where the emotional stake is, because if the emotional connection is high, it might be worth whatever the cost of connection is. I'm not saying every time, but it is worth noticing and seeing if you can make it work.

Also, a mistake to avoid is to assume that you know what people want without asking. Trying things out, seeing what works, seeing what doesn't. In my company, Allume, we tried out a lot of things. One of the Customer Experience Improvements we did was to have homemade cookies during orientation. We discovered that people really loved that. Another Customer Experience improvement that we had was we offered, a stipend that they could use every month towards wellness. And we found that everybody was excited about it, but nobody used it. Out of 300 employees, we had two or three that would actually take up and go [00:14:00] and get themselves a gym membership and use their stipend.

So you don't know until you ask, until you try it out. Once you try it out, you can make decisions about which Customer Improvements are most important.

The thing to remember is that ***even satisfied customers and high performing team members may quietly disengage if their experience with your company stagnates.***

I see this happen as companies grow, especially because that level of excitement and connection early on in the culture, might have a certain flavor and feel. If that doesn't stay fresh, your team members will start to feel like "*This isn't that special anymore and somebody else can pay me more, so I'm just going to go.*" Or your customers start to feel like, "*Yeah, I used to be really important and valuable, and used to be important, but now I'm not, and so I don't need to stay.*"

[00:15:00] This is why it's so critical that you stay engaged in Three Areas of Improvement for your customer at all times.

What do I mean by improvements?

When you see in the Selector(TM) that you download. There's a bunch examples.

For customer improvements. It could be **customer milestone celebrations**, so whatever their milestones are. What is the transformation you're helping them with? In our Savvy Kids example, it's the kid being able to get closer, and closer, and finally tie the shoes. With A Force for Good, it's their first 4-Page Growth Plan(TM) done; it's having a celebration when they see their 10% increase in revenues; or when they have that exponential growth, when they double their monthly revenue. These are examples of ways that you could build into your system customer milestone celebrations.

The next one is **simplified billing and invoicing**. If this is a point of pain for your customer [00:16:00] and it's creating friction, then this could be a place that you could make improvement.

Another offer here is client only strategy sessions. So every business is different. We haven't talked about Growth Models yet, but average revenue per customer --if you have, less than a hundred dollars a you probably aren't going to be able to offer client only strategy sessions, but maybe you could to a group of them all at once. But these are ways for you to reach out and add value.

What are ways you could do **post-purchase thank yous**?

We did this with Allume. We had a whole series for our customers and for our team members. Thank you for being our customer. Thank you for being our team member. It involved a series of steps where you would hear from your case manager. Your scheduler. Thank you. You would hear from the administer. Thank you. You would hear from me, the owner. Thank you. And, and there would be different moments along the way when those would show up. All different kinds of ways to make sure we checked back to [00:17:00] make sure they were happy and well.

The system we designed for our team was even more elaborate.

So there could also be **a customer education series**. These are different things to help them experience the transformation that they're hoping to experience, and that you promise to deliver.

For team improvements-- there's so many wonderful things you can do for teams, right?

Highly recommend having a 90 day onboarding redesign. If you don't hire that many people and you aren't planning to hire anybody soon, then doing this right now may not be your most important thing. But if you are hiring people actively, this is so important. Having an experience where they have everything they need. The retention rates and success rates of employees who have a very clear and powerful 90 day onboarding experience are, it's like three times as many. The percentage of retention after a year. So 90 day onboarding for both customers [00:18:00] and team members low hanging fruit.

Perhaps values-based orientation journey. Voice of the team surveys. Weekly team impact stories. Monthly mental health check-ins. These are just some of the ideas.

So ask yourself right now, *which three experience upgrades-- big enough to matter, small enough to execute-- would transform your growth trajectory this quarter?* Think about some that would involve your **team** and some that would involve your **clients**.

If you have a very small team, think about what would support you, the founder.

The power of three. Why three?

Simple. You and your team can remember. You can implement three. Three is enough to focus attention. You may even decide three is too many and you could just do one. That's okay too. [00:19:00] A single improvement can reduce churn. Focus is what's most important. When we're scattered, we don't do our best work, and we don't do the work that ends up creating results. So having just three gives us the power to reduce churn and see results. Three.

Three can shift culture, retention and growth velocity.

Start with three. Big enough to matter. Small enough to execute. Powerful enough to transform.

Isn't it exciting? I think it is.

We are going to move into the three Customer Experience improvement Selector(TM) now.

We're going to **brainstorm possible improvements.**

We're going to **measure impact and resources**.

We're going to **plot those improvements**.

Prioritize those improvements.

And **select three** [00:20:00] **improvements.**

Go ahead, pull out the selector(TM) if you haven't already. We are going to use the Savvy Kids example. So Savvy Kids has different types of products that help children learn. The first product to market is shoe laces. Shoe laces designed to help kids in preschool and kindergarten learn how to tie their shoes and feel good about themselves as they do it.

When you look at the Three Customer Experience Improvements Selector(TM), there's a whole bunch of examples. Client experience as well as team members. Is a great place to get some ideas.

So let's go ahead and get to the first section. I'm going to invite you to brainstorm . On the next page you're going to brainstorm. So in the first column, you are going to come up with 10 [00:21:00] or so ideas for the client-facing experience and 10 or so ideas for the team-facing improvements experience.

I'm going to read to you some questions to help you get your ideas going, and then we'll talk about some of the ideas that Savvy Kids customer thought about.

What new ideas do you have to attract prospective customers?

What ideas do you have to give prospective customers remarkable experiences at your company?

What new or improved ways could you enroll a prospect to become a customer?

What new ideas do you have to create remarkable experience while your customer is being onboarded?

How could you improve the experience of signing agreements, invoicing, and collecting payments?[00:22:00]

How could you better align with customer wants, needs and preferences?

How could you improve the process and experience of delivering the product or service to your customer?

How could you improve the process and experience of resolving customer problems and complaints?

What would create a wow experience for your customer?

What would celebrate their journey? What would help you celebrate their transformation? Their success?

What would help them feel seen, celebrated, valued?

What would make every customer [00:23:00] *feel as though they must be the most important customer to your company?*

Don't get overwhelmed. You don't have to do them all at once.

Next question is regarding **your precious, blessed team.** And by the way, **this involves you**. You are part of your team.

What new ideas do you have to attract perspective teammates? Especially if you're always needing new people. *Ways to attract them? What new ideas do you have to give perspective teammates remarkable experiences of your company before they're hired?*

What new ideas do you have to invite or enroll a prospective hire to [00:24:00] *become a member of your team?* Think about how you could do it in a way that is special, unique, helping them feel like they're important, they're valuable.

What new ideas do you have to create a remarkable orientation and onboarding experience in the first 90 days of a new team member?

And by the way, you could do this now with all your team members. *You could do a 90 day onboarding reset.*

How could you improve the experience of initial hire paperwork, setting up payroll and offering them benefits? What would make this initial experience remarkable?[00:25:00]

How could you improve the experience of coming to work each day, whether they're virtual or at a location? What would make coming to work every day more culturally intentional?

What are those three feelings you want to cultivate yet another Core Growth Element, but what would be the things you'd want them to feel coming to work every day?

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?

I'm sure you've got lots of great ideas. You can return to the prior pages for some ideas to get your mind jogging.

For Savvy Kids the list is very different from an ABC Integration Company. It's also different for A Force for Good. It's different for Allume. [00:26:00] Every single one of these is going to be a unique blueprint. Your company is not going to sound like Savvy Kids because Savvy Kids is a different company than yours.

But this will give you some ideas. This is for the client. Again, this is for kids who are trying to learn to tie their shoes. *" First 30 Days of Trying."* it's an activity kit that comes with purchase, includes stickers, progress chart, and a printed guide. So this is something they're thinking about.

Parent dashboard to track child's progress.

Another idea is a video series Pearl who happens to be the little girl that, that, ~~uh,~~ is part of our shared avatar. "*Pearl Learns to Tie."* Child- led short clips showing milestones. Could be the *Welcome Card with Pearl Story and QR code* to video welcome from the team. Could be *Quarterly Parent Tips Newsletter* with skill building ideas.

Could be a *Surprise and Delight a Milestone Gift* sent after photo share.

It could be a printable [00:27:00] *Certificate of Independence after Shoelace Mastery*.

It could be simple, *Mobile Friendly Reordering System*.

It could be the *Voice of the Customer*: three question surveys sent post-purchase.

Are some of the ideas that Savvy Kids had on their list.

For team-facing.

Milestone Commissions Celebration Boxes. In their company, they have all these mostly moms who are the sales force of Savvy Kids. Special boxes get sent out after they've sold 25, 50, and a hundred.

There could be a *Monthly Super Savvy Spotlight*, celebrating one of those team members.

Could be a *Flexible Friday Power Lunch*. So monthly fun Friday lunches to co-work, share, open to kids, and have lunch provided.

The next one is *Your Dream Funded.* This is a mini-grant program they wanted to [00:28:00] offer to their employees. $50 monthly grant to any team member to support a personal dream or community project. Something like that might be great for your company. Depends on your culture, right?

Choose Your Own Adventure Rewards. Reps choose from a menu of thank you options for reaching specific goals. This is another idea.

A Heart Wall of Gratitude. A digital collage of love notes for team members to hear positive things they've heard from their customers.

Values-Driven Quarterly Retreats. A time of purpose-led awards, recognition, storytelling and planning, where they can come together and think about the next quarter.

Hopefully you have brainstormed a bunch and now you're ready to go to the next section.

Part two, **measure the impact and resources**.

For each of your ideas of different improvements you could make, ask ***what's the*** [00:29:00] ***impact?*** What would the level of impact be to your customer or employee experience? Think about impact overall. How much of an impact it's going to have on your bigger picture. If you have a **12-Month Breakthrough Goal**-- something you want to achieve over the next 12 months-- which of these improvements is most dramatically going to help you with that? Impact scale at one to four. One being low. Four being very transformative and impactful.

The second area we want to think about, is resources. **How much resources it's going to be?** *What's the level of time, hours, financial investment that would be required to implement this particular ideas?*

Some improvements are quick and easy. Other ideas will take more energy, time, and focus. Rate each of these from one to four. One requiring the the least resources. And four being extremely resource intensive. So one to four.

Then we go to part three, and part three is where you take what's on the list and [00:30:00] move them into these quadrants.

The first quadrant is an implementation of an improvement that's *high-impact*-- so it gets 3 or 4 for impact-- and it has *low resources --* it has a 1 or 2 for resources.

So you're going to list all of those improvement ideas.

Then you're going to find the ones in the **second quadrant** --on the top right corner. *High-impact*-- a score of 3 or 4-- but it also has *high resource* requirements. So those take more energy and time, and have a 3 or 4 as well.

Then you're going to find in the **bottom lower corner**, *lower impact* and *lower resource improvement*. This is where you have, 1s and 2s for impact and ones and twos for resources.

The last quadrant are the ones that have 1s or 2s for impact, *low impact*, [00:31:00] and *high resources, 3 and 4.*

So you can start to see quickly, *"I don't really want to do the things that are low impact."* Whether they have low resources or not. You can quickly identify the ones that you *don't* want. And you can start to look and see the ones in the top that you want to think about. Which ones are most likely for you?

On step four, **you're prioritizing.**

In general, I'll say you're first going to focus on the top left hand corner of those things that are, *high impact*, *low resource*.

Sometimes you might also draw from the top right where you have *high impact* and *high resource* improvement. For example, , maybe you have a very important product that you've been working on and need to bring to market.

That is a high resource thing. You will occasionally need to invest time and energy into those things that are higher resources.

This is best done with your team where you can talk together about all these ideas. And come [00:32:00] up with what you believe is going to have the biggest impact.

It could be that you step away and do a exercise where you query your team members and query your constituents and find out what they think too.

Once you've gone through and focused on prioritizing, you go ahead and move to the last page.

So by a particular date. So in this case, by October 1st, 2025, we would like to make these three improvements. ***What would those improvements be?***

In the case of Savvy Shoelaces, they decided that the *Choose Youre Own Adventure Rewards* would be really important and strategic to help them meet their 12 month breakthrough, and also help them in getting their team to focus in the ways they most want with the client.

They also decided to do the *Welcome Card with Pearl Story and QR Code*, with a video welcome from the team. They [00:33:00] decided that would be really important to have. And they also felt that the other piece, the *First 30 Days of Tying Activity Kit* with the purchase would be good to have.

So you've got a blend of what you're doing for your clients and for your team in the selection. You could see how together these new improvements would radically shift the experience of the customer in both the mind of the client and the team member. And also think about how fun it will be for your team to implement all three of these.

So that's another area I invite you to focus on is the improvements that are going to inspire your team, create fun and excitement.

So now go ahead and put these Three Improvements onto your 4-Page Growth Plan(TM).

Let's celebrate your wins. Now you've completed Three [00:34:00] Customer Improvements. You've reconnected with your purpose of service. You've identified tangible ways to elevate both loyalty and culture. You've clarified priorities that energize your team. You've aligned growth with care. You've

identified **three experience upgrades that can transform your company** and really make a difference in your growth trajectory this quarter.

Build a company beloved by customers and team members alike. Do that and it will create a business that scales.

Update your 4-Page Growth Plan(TM). Go to the bottom of the first page and update it.

As you're looking at your 4-Page Plan, it may show you other things you're curious about. We talked about the Journey of the Customer today, the Three Feelings to Cultivate. You may want to define Who They Are and What They Need. Maybe it's now helping you think more about your Core [00:35:00] Purpose, your Vision, your Values. So use this moment to-- as you've considered Three Customer Experience Improvements-- see how you might evolve everything else on your 4-Page Plan to meet the needs of your customer.

Let's put your Three Customer Experience Improvements into action first with a habit.

What are High-Leverage Habits?

They're repetitive practices that all but guarantee breakthrough results.

What habit could help you focus and your team focus on the Three Customer Experience Improvements you just chose?

So here's some examples. You could add your Customer Experience Improvements review to your monthly dashboard meeting. So put it right into your agenda. You could begin every team meeting with, "*who did* [00:36:00] *we serve well this week?*" You could use a feedback pulse survey every 30 days. You could review improvement progress quarterly. You could celebrate one small win in every Monday huddle.

Identify a habit that would ensure you have success with your three new Customer Experience improvements. Another idea would be to identify one person, not you, to be in charge of each improvement. Sue, Larry, and Bob, right? They are assigned to set up a weekly meeting with two or three other people on their team to help them complete this high leverage habit by the date.

Small improvements, consistently executed, create legendary experiences.

The other thing you can do is identify a **High-Potency Action.** *It's a one time catalytic action that creates* [00:37:00] *measurable transformation.*

What's one thing you could do this week to activate Customer Experience improvements in your culture?

Assign one leader per improvement. Set a time in the next seven days to meet and create a plan for each improvement. Create an action plan for each of the three improvements. Announce your three chosen improvements. Add the three experience improvements to your weekly, monthly, and quarterly meeting agendas.

These are things you can do to set it up so that the Customer E xperiences can't fail. ***Success is the only outcome because you've set it up that way.***

What you choose to improve reveals what you value. Choose with intention and lead with care. It will pay dividends.

So we did a lot today. You defined [00:38:00] **Three Customer Experience Improvements.** You used the **Selector(TM).** You integrated the Three Experience Improvements into your **4-Page Growth Plan(TM)**. You identified a **new habit** to make sure Customer Experience Improvements are part of your everyday life. You committed to a High-Potency Action to get it off the ground, and you reconnected to *culture as a growth strategy*.

You're ready to scale a business people cherish --*inside and out*. Isn't that exciting?

What's next?

I encourage you to pick up a copy of the book, ***A Force for Good***. If you already have it, I encourage you to go to chapter seven. You're going to see more information about Customer Experience there, and you'll find the Customer Experience Improvements in that section. You'll also gain access to the **Full Force for Good Toolkit**. You'll get all of the PDFs for the tools, and the tools themselves have instructions inside of them.

Together you have everything [00:39:00] you need to install this elevated model of exponential growth. Keep asking the question, *"what would make success the only possible outcome."* Use these tools to help you figure out the answer.

Next you can get the Tool of the Week. Each week you get a new tool and a masterclass for free for a week, and then you can improve your overall 4-Page Growth Plan(TM). New wisdom to create exponential growth.

You can sign up for the **Growth Accelerator.** This is where you put the full system together in the most efficient way. Go check it out at aforceforgood.biz/accelerator.

Thank you for joining me on this journey today of helping you discover the value of Customer Experience for both your clients and your team members, and identifying Three Customer Experience Improvements that will [00:40:00] spark growth and lead you to building remarkable moments with your customer.

Remember that the world is made better by women led business. Let's all go make the world a better place.