



▶ The Customer Journey 100 is a tool to assess the customer service experience in your business. Use it to identify areas for focus. The intention is to make your practice one of the most progressive within your sector. (You may also learn you are already among the best!). It focuses on six areas:

- Foundations for Success
- The Customer Journey [I]
- The Customer Journey [II]
- Ethical Selling Skills
- The Customer Journey [III]
- The Welcome Pack

There are 3 steps to completing The Customer Journey 100:

1. Answer each question. If the statement is true, check the box. If not, leave it blank until you've done what it takes for it to be a full YES. Be rigorous, be a tough marker. Only tick the box if the statement is virtually always true for you – if it is only sometimes or usually true, it doesn't count. However, if the statement doesn't apply to you, so therefore will never be true, then tick the box (you get credit for it as it will never happen). You may also modify statements slightly to more appropriately fit your situation – but this must not be used as a 'get out' clause to make it easier to score!

2. Summarize each section. Add up the number of boxes checked and note the total at the end of each section. Then transfer the total of each section, along with the date, to the spaces at the bottom of this page. As you continue to work The Program, your totals will change. Use this section to track your progress.

3. Keep playing until all boxes are filled. This process may take 30 days or two years, but you can do it! It's not the time that matters, it's that you are moving forward and achieving results. Use your coach to help plan your strategy and maintain your focus.

PROGRESS RECORD

Date	Foundations for Success	Customer Journey [I]	Customer Journey [II]	Ethical Selling Skills	Customer Journey [III]	Welcome Pack	TOTAL

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Foundations for Success

It has been said that you cannot make progress as an individual or with a team from a start point of low self-esteem. In this section we explore the potential market and the attitudes that will be necessary for your prosperity.

- We have created sufficient time in the appointment book to enable us to deliver our ideal service.
- We follow a program of continuous professional education to ensure our ability to deliver our products/services with excellence.
- We follow a program of continuous development in customer service.
- We follow a program of continuous development in ethical selling skills.
- We allow brainstorm rules when discussing new ideas.
- We understand the implication of demographics and economics in recognizing our ideal clients.
- We recognize the future economic potential of the market we are serving.
- We appreciate that our products/services will be in demand – the question is 'who will the customer buy them from?'
- We understand the quality/price/time triangle and have chosen high quality products/services and customer service, along with convenient timing/environment as our focus.
- We do not compromise on our prices.
- We all feel that we are paid adequately for what we do.
- An element of our pay is related to the performance of the whole business.
- We feel appreciated by our employer.
- We appreciate each other.
- We appreciate the customers that we serve.
- We are appreciated by our customers.
- We have fun at work.
- We enjoy the physical environment in which we work.
- We have a high self-esteem as individuals. We are '10's.
- We have high self-esteem as a team. We are a '10'.
- We understand that life is series of 'mountains, valleys and missiles' and do not allow that to effect our '10'.
- We have a helium culture in our business – when we communicate, we do so in a way that increases the listener's self-esteem.
- We are professional actors at work – we do not have 'bad hair days'.
- We understand that our customers pass through the business like batons in a relay race – and that part of our job is to prevent the baton from dropping.
- We understand that a 'wow' customer journey consists of Structure (the physical environment), Process (how the customer is dealt with as an individual) and Outcome (does the customer receive their desired outcome?).
- We recognize that selling can be ethical if delivered in the correct way.
- We recognize that ethical selling is about helping customers to buy the products and services that are suitable and desired.

_____ Boxes checked

The Customer Journey [I]

Receptionists can be called the 'Managing Directors of first impressions'. All of the team are involved in meeting and greeting new customers. In this section, we explore the creation of those first impressions.

- When we answer the phone, we smile, greet, introduce ourselves by name and enquire.
- When we greet a customer personally, we smile, make eye contact, acknowledge, introduce ourselves by name and enquire.
- When we are questioned about our products and services we do not simply hand over literature – we ask 'what is it about _____ that you are interested in?'
- We have permission to use our intuition and respectfully say 'No' to inappropriate customers.
- We have developed appropriate language for this.
- We always ask customers whether they would like to book an appointment.
- We can deal with concerns and objections using the 'feel, felt, found' technique in a genuine way.
- We always introduce appropriate special offers into the conversation.
- We recognize the opportunity to cross-sell our other products and services.
- We understand how to create an 'elevator speech' to explain the benefits of what we do.
- We have heard 'elevator speeches' from all of the team.
- We understand that 'no' can mean 'no never' or 'no, not now' and we have a diary system to remind customers when asked.
- We understand the concept of a reservoir of future sales.

_____ Boxes checked

The Customer Journey [II]

From reception to consultation – key skills to deal with delay and to "pass the baton" carefully.

- If customers are late to arrive, we have a system and language to deal with this.
- When customers are delayed because we are late, we keep them posted frequently. We have a system and language to deal with this.
- We explain that delays occur because we are helping other customers.
- We have an appropriate environment in which customers can wait for a meeting/consultation.
- When we greet customers on the premises, we make eye contact, smile and introduce ourselves.
- We have a system by which customers are escorted through our premises.

_____ Boxes checked



Ethical Selling Skills

Successful business is 98% understanding people and 2% technical knowledge. You must have 100% of the 2% – but it's the 98% that makes the sale.

- We begin our relationship with our customers by building rapport. We understand how to do this.
- We then move on to review their interests as expressed on our menu.
- We understand that a blank menu does not necessarily mean a lack of interest.
- We understand the distinction between products/services, features and outcomes. We focus on the customer's desired outcome.
- We can and know when to ask 'current situation' questions.
- We can and know when to ask 'benefit' questions.
- We can and know when to ask 'barrier' questions.
- We can and know when to ask 'outcome' questions.
- We understand how to construct a capability statement when making recommendations.
- We include a description of the factual recommendation.
- We bridge this into a benefit statement.
- We remind the customer of the outcome.
- We offer evidence.
- We ask for trial commitment.
- We understand how to resolve concerns and objections at this point.
- We make a 'cushion' statement.
- We reflect and clarify the concern to ensure our understanding.
- We identify any hidden objections.
- We respond with solutions, explanations, education, options, evidence or value.
- We ask for a trial commitment when the concern is resolved.
- When challenged on price, we request clarification – 'is the concern about value or timing?'
- We can offer payment timing options to resolve this concern.
- We understand how to gain final commitment.
- We can and know when to ask direct commitment questions.
- We can and know when to use alternative choices.
- We can and know when to use minor points.
- We can and know when to request a move to the next step.
- We can and know when to utilize future opportunities.
- We can and know when to use a weighing method for larger decisions.
- We know how to present our recommendations in writing and how to discuss them.

____ Boxes checked

The Customer Journey [III]

When the customer has made a successful purchase, the work of building a life-long relationship begins. Here we examine how to build that lifetime customer and have them introduce their friends and family.

- We have a system and language to request testimonial letters.
- We keep a testimonial folder in our premises.
- We have a referral card.
- We have a system and language to distribute referral cards.
- We have a system to follow up on testimonial letters.
- We have systems and language to request payment.
- We give our customers options for payment, so as to accommodate timing - but we don't compromise on price.
- We always book our next meeting with customers.
- We have an 'end of transaction' letter and a system for its issue.
- We know that 'attitude, not aptitude, determine altitude'.

____ Boxes checked

The Welcome Pack

It's a great idea to establish boundaries at the start of a new relationship – and to expose yourself to the risk of doing business. A well-designed Welcome Pack will save you time and money.

- We have created a Welcome Pack for our business.
- It includes a covering letter outlining the customer's first 'journey'.
- It contains a copy of our mission statement.
- There is a 'meet the team' section.
- It includes necessary directions/parking details.
- We include our terms and conditions of business.
- There is a 'promises' section.
- There is a price guide.
- There is a menu of our 'top 10 outcomes'.
- The language of the menu is 'outcome' followed by 'feature', followed by product/service description.
- We include any preliminary paperwork for the customer to complete and also explain the benefit to the customer of completion.
- We appreciate that some prospective customers will cancel as a result of reading our Welcome Pack – and that this is a good outcome.
- When customers arrive, we ask for the completed initial paperwork, plus a specific request to complete the menu.

____ Boxes checked

Congratulations on completing The Customer Journey 100! Revisit the program until you get 100 ticks. Remember, every professional's experience will be different. Be kind to yourself and work at your own pace. There is no one right way to reach 100! Good Luck.

