Creating Customer Experience with Joey Coleman

"The experience a customer has is the last, great differentiator."

Joey Coleman is the Chief Experience Composer at Design Symphony - a customer experience branding firm that specializes in creating unique, attention-grabbing customer experiences. His clients include individual entrepreneurs, start-ups, small businesses, non-profits, government entities, and Fortune 500 companies. For over a decade he's worked with clients that include NASA, Network for Good, Hyatt Hotels, Zappos, the Save Darfur Coalition, and the World Bank - not to mention dozens of regional and local organizations around the world.
Voiceover: This is Business Reimagined. Every week we talk with thought leaders and revolutionaries who are reimagining the way business is done in their industries like today’s guest, Joey Coleman.

Joey: If we get the first hundred days of the customer relationship right, we have a customer for life and in order to do that we need to acknowledge that customers are going through an emotional interaction with us that as a general rule doesn't align with the way we operate.

Voiceover: This is Business Reimagined with Danny Iny.

Danny: Joey Coleman is a customer experience design expert and an award-winning speaker. He has helped clients like NASA, Zappos, Hyatt Hotels and The World Bank create what he calls the last great differentiator in customer service. With a resume like that you might think he's been a branding expert all his life but that couldn't be further from the truth.

Joey: I went, studied government international relations in college, went straight to law school where I studied international law, national security law, and litigation. I was a business consultant for a few years, I worked for the White House, the CIA, and the Secret Service. I was a criminal defense lawyer for five years, I taught executive education courses, and then I ran a marketing and design company for over a decade.

Danny: Over the course of that varied and winding career path, Joey noticed something interesting that held true no matter what context he was in. Whether he was in front of a jury or a room full of students the experience he created was what mattered more than anything else so Joey took this idea and applied it to marketing.

Joey: The experience that a customer has is that last great differentiator, you know we can't differentiate on price anymore, we can't differentiate on quality anymore because everybody expects the lowest price and the highest quality. We can't differentiate on availability because everyone expects twenty-four seven three sixty-five availability on a global scale. What is left to make your business stand out from the the other businesses that you are in competition with, or from your number one competitor, which in my opinion is always the status quo?

Danny: How does this translate to the real world? How do you create an experience? It can apply in all kinds of different ways and places but starts with just being meaningfully better at some key
part of what you do. Take, for example, the fast food chain McDonald's. Whether or not you
have eaten there you can probably name the one thing that they do that no one else comes
close to.

**Joey:** There are many, many fast food or convenience restaurants. None of them have created french
fries that rival McDonald's french fries and so McDonald's kind of owns that space in the
experience they create with their french fries. It quickly became clear that if you focus on a few
key aspects of your business as being experiential and being unique you can build an entire
brand around that.

**Danny:** Chances are your company or business isn't the size of McDonald's and maybe creating a great
experience for your customers is actually an area where you shine, but is that something you
can scale?

**Joey:** In the beginning of any business there's a general rule we're actually pretty good at creating a
great experience for our clients because we don't have very many. It's easy to treat clients with
a level of customization and personalization and care and really go out of your way to create
something remarkable when interacting with them when you only have four clients. As you add
new clients and as time goes on this gets more and more difficult. What I find that established
companies really benefit from when considering the first hundred days process is not only
getting better at their retention of new clients in the onboarding process but more importantly,
they increase wallet share from their existing clients and they increase referrals from their
existing clients.

I don't know about you, Danny, I have yet to find a business that if I went to the management
team and I said, "Would you be happy just stopping at the number of referrals you have now,
are you good if you never receive another referral again from one of your existing clients?" Most
businesses say, "Absolutely not. In fact, I wish I was getting even more referrals from my clients
than I am. I don't even know how to ask for referrals. They don't seem to come in even though
our clients tell me on our satisfaction surveys that they love our product, they love our service
and they continue to stay with us we're not really growing the relationship the way we want.
We're not really getting referrals." That's where, I think, adopting this philosophy or way of
thinking that really is the core of the first hundred days process can have huge impact on all
aspects of your business, not just the new clients.

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**Danny:** In a nutshell, in two, three minutes what is the first hundred days process and then we'll drill down?

**Joey:** Absolutely, so the first hundred days process basically says if we get the first hundred days of the customer relationship right, we have a customer for life. In order to do that, we need to acknowledge that customers are going through an emotional interaction with us that as a general rule in the great, great majority, north of 90% of businesses, doesn't align with the way we operate. What I mean by that is they're going through a series of phases, and those phases break down as this and I'll give you the thirty-five thousand foot view of the phases and then we can dive deep into any of them that you think are interesting.

The first phase is assessing, this is where the prospect is looking at you and saying, "Is the service or the product that you offer something that I want and need?" This process can be short if you're standing in the line and trying to decide if you want to buy some breath mints as you're checking out of the convenience store, or it can be long if you're say doing the contract to build runways at a major airport where it may be several years of bidding and contracting before you actually get the deal. Regardless of how long the assessment process is, we reach what I like to call day one. Day one is when the customer raises their hand and says, "I need your product, I need your service."

I call this admitting, they admit that they have a problem and that you are the solution. They sign the contract and they say, "Let's start working together," and almost as quickly as they do they move into the next phase which is being anxious, right? This is the buyer's remorse stage where all brain signs and research shows this, that right after we make a purchase we begin to doubt ourselves for the purchase we just made.

Why this piece is particularly interesting for businesses is while your sales team is back at the office high-fiving, ringing bells, celebrating that they just landed the new client, at the client's office they're wondering, "Did I make the right choice? Are they going to be able to deliver everything they promised in the sales process when it comes time to execution?" That delta between where you're at as a company and where they're at as a client often never closes, it just continues to add stress to the relationship going forward. We then come to phase four, activating, this is the initial kick-off meeting when they open the package if they've ordered ...

**Danny:** Sorry, did I miss a phase?
Joey: Uh, no.

Danny: Phase one was

Joey: Assessing

Danny: Where they're assessing. Phase two is admitting.

Joey: Phase two is admitting, phase three

Danny: Phase three is anxious

Joey: They're being anxious

Danny: Okay, right.

Joey: Phase four is activating,

Danny: Okay.

Joey: Right? They all start with A, we'll keep this real simple, right? Phase four is activating, this is where they have the initial kick-off meeting, they open the package, this is where you have the opportunity to activate the relationship and show them that they're perceived view of what the relationship is going to be like, was not nearly as good as what it's actually going to be like. We want to have a huge first impression and a great interaction right out of the box where they feel welcome, they feel taken care of, and they have a clear understanding of what the experience is going to be like going forward.

We then come to the next phase, acclimating. This is where the customer is getting used to doing business with you, right? They're trying to figure out what it's like to interact with you, they're navigating through the process. Now, you've done these type of projects or provided these types of products hundreds of times but for them, it's the first time they've ever done business with you, so we really need to hold their hand and help them acclimate to your way of doing business.
If we do this properly they reach the next phase, if we don't do it properly they never reach the last two phases but if we do it properly they come to phase six, adopting. This is where the customer takes ownership for the relationship and says, "I am as responsible for this relationship as you are." When they start to schedule the meetings to get together, where they start to anticipate their own needs and let you know those in advance so that you can serve them. When they have adopted the relationship and begun to take ownership and then and only then do we reach the final phase.

Phase seven, advocacy, right? The advocating phase is when the customer becomes a raving fan and turns into your non-paid, external sales force. They're referring new business to you, they're singing your praises, they're driving your business in new and exciting ways because they are such rabid fans of the work you do they can't help but tell everyone they know about it. What's fascinating as we look at the theses seven phases, the average business is consciously focused on maybe three, maybe three.

Probably they have a sales and marketing team so they are focused on the assessing, they're focused on getting them to admit and sign the deal for their contract and they're usually focused on what that first interaction is, right? Like, oh we have to deliver the first product or we have to have a kick-off meeting. All the other phases are really haphazard and they're not systematized and they're not organized in a way that is designed not just to serve your business operations and your business structure but rather to create a remarkable, inspiring experience for the client where they feel loved on, taken care of, provided for and guided through doing business with you.

Danny: Where do businesses most often drop the ball?

Joey: They actually drop the ball in a couple places. The first place they drop the ball is in that anxious stage, right, that I mentioned before? Where they think, "Oh awesome, the client selected us so they must be super excited about working with us and they're as excited about this as we are," without ever acknowledging that they have some doubt. You know the interesting thing about buyers remorse is we've all experienced it. When we buy something we're like, "Meh, I hope this works," or we buy it and then we kind of move on to the next thing and it's not as big of a priority. This difference between how we emotionally feel about it as the person who sold the product or the service and how the customer feels about it as the person who purchased the product or service is something that needs to be looked at and addressed.
Sometimes it's as simple as letting them know right after the purchase, "Hey, we're going to take great care of you. You made a fantastic decision, here's why. Let me show you that I was listening to you, let me show you that the service or product is going to be everything you dreamed of and let's paint a picture of what the future together is going to be like."

The other phase where a lot of businesses drop the ball is in the acclimation stage. As I mentioned before, you've done this type of project hundreds of times, for your client, it's the first time they've ever done it. We have a tendency to forget how stressful and angst filled this can be.

**Danny:**

I want to drill down on this because this makes perfect sense in theory like I get it, you know, of course, people are starting a new relationship with you and your business. It's scary, it's intense, they're starting something new, it is new to them in a way that it isn't new to you and so you've got to onboard them to that. It sounds, from your examples, like the clients you work with typically it's a sophisticated sale, it's a sophisticated purchase, it's a complex delivery so I want to understand how this works in practice.

In the case of your 250 new legal clients a year, I'm assuming there was a variability in terms of the severity of the charges, the level of experience and sophistication that these clients had in terms of had they ever been in court before, how educated they were, etc. etc. How seriously they were taking it, how significant the repercussions were likely to be and so that would suggest and I ask because I and many of our listeners are in the same boat, all of their customers, all of your clients, they are not all the same.

They're not all going to have the same needs, fears, frustrations, they're not going to absorb content or ideas or suggestions the same ways. How do you create an SOP or a you know this what I do on day one, this is what I do on day two, this is what I do on day three, that is like a standard process that works for everybody?

**Joey:**

Look, well a couple things. Number one, if we talk about a complex sale or something that has lots of people or lots of moving parts this is often easier to see and because I imagine most of your listeners who work in those type of businesses are already thinking, "Oh my gosh, I see how this works and the guy who does the sale is not the same as the gal who does the implementation and the person who is in the kick-off meeting might not ever talk to the client again and those type of things." It's kind of easier to see in the complex.
Let's talk about a specific example in the simple, a simple product sale. One of my clients, an amazing company called For Canines sells covers for your car, you put these on your car seats so that when you are transporting your dog in your car your dog doesn't scratch up and tear up your seats, okay? With all due respect to my clients that run this business, we're not curing cancer here, right? I mean this is a product that they mail to you from Amazon, you open it, you put it on the seats, it protects your seats, your dog can ride along without getting fur and hair and all of that and tearing up your seats. It's a pretty simple concept, right? Once you buy one of these chances are you don't need a lot more, right? You maybe buy another one for your other car but as a general rule, it's not a recurring purchase that you are going to make every month, like a supplement or something like that.

The way we might look at this in terms of how do we make sure that they're properly acclimated to the process is we recognize that some people would buy the cover and never actually install it. They would either get confused as to how to install it or they just wouldn't take it out of the package. Now, for those of your listeners that are saying, "Joey, that sounds ridiculous," all I have to ask is, go into your closet and is there a single article of clothing with a tag still on it? Because if there is I've proven my point, or have you ever purchased a product that showed up at your house and you thought that you were going to use it but you really didn't, right?

The question became how do we get the item out of the package and into use as quickly as possible. We made the packaging not only very intriguing with directions of like why you want to open it and to get people into the package but on the inside we said come check out these videos and we had these really fun and entertaining videos showing installation and making it super clear and super easy how to install the car seat cover. Once we got it installed the customer would use it and we knew that once the customer used it, they would love it and they would tell their friends about it.

You asked the question at the beginning, how does this tie into the fact that you might have different customers? One of the things that I do when I start working with my customers from the outset is we look at their audience personas. Who are the different types of customers they are selling to and what do we now about those types of people? That way our messaging not only from a marketing point of view but from an implementation or onboarding point of view can be very much steered towards the type of personality we are dealing with. What I will tell you is regardless of the size of your business you should max out at about four to maybe six different personas or audience types because otherwise, it gets too complex and if you have more than that there are ways you can simplify and group them together in a more efficient fashion.

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**Danny:** What do you do about, for example, messaging tone, etc.? Let's say you've got, I mean even if it's really simple, let's say you've just got two personas but they're substantially different and when somebody purchases, I mean in the case of if I'm buying these car seat covers because I have a pet. I'm getting it on Amazon, there's no field where you collect which persona am I so what do you do, how do you vary the messaging? I could see a scenario where, for example, if you look at two personas one is a persona that needs a lot of help and hand-holding and the other is much more independent and much more pro-active. How do you provide the help to one without the other feeling like you're talking down to them?

**Joey:** I think the way in the example we used in the packaging, if we've identified there are only two personas what I would do is within the packaging you would open it up and on the inside the first thing it would say is, "What kind of dog owner are you?" It would have two illustrations, on one side it would say I'm new to owning a dog, I've never had a car seat cover before, I'm excited about the prospect of taking my dog for rides in the car but I haven't really done it effectively in the past, if at all. The other persona would have another picture of somebody sitting in their car with the dog that says I'm an old pro at this, we've had our dog for years, our car is ridden around using other car seat covers in the past, we're very comfortable with this. Then underneath each, I would break down the directions with obviously more detail for the first persona than for the second one.

Here's what will happen, people will self-select into the category that's most applicable to them and if they get that right, perfect, if they get it wrong the way that they are probably going to get it wrong is they are going to think that they are the pro expert veteran more than they will think they are the novice, right? Novices are usually quicker to over-state their expertise than an expert is to say I'm a novice, right? As a result, the novice who over-states their expertise and reads down the profile of the person who's more of a pro at this, they are going to get into those instructions and if they get confused or it's not clear, are going to be able to jump back over to the beginner installation instructions with no difficulty. Yet, if they really are an expert and they don't need that level of description and care or they are a self-starter, they're someone who doesn't really follow the rules, they can still take it out and do their best and if they succeed great and if they don't they can fall back on the beginner instructions.

**Danny:** How does that, and I'm not being difficult, I just want to drill down because

**Joey:** Sure.
Danny: I know that these are going to be the questions in the minds of our listeners. How does that help with the people who never take it out of the box?

Joey: Well, that's a separate question. The question was, I thought the premise of the first question was how do you address the two different types of personas? For taking them out of the box is a completely different conversation. That's about making sure that the packaging and the design encourages people and intrigues them to look inside. Again, that becomes very specific, in the particular packaging we did for the dog cover, for example, it's colorful packaging that reiterates on the front of the packaging the main reasons why you purchased this. It has a huge image of the cover fully installed in a car with a dog sitting on it so we have kind of a clear before and after type of thing happening at a psychological level.

It's not just a picture of the cover, they see, "Oh, once I have the cover I'll have my dog on it." It helps them more clearly understand and then there's directions on the package that are saying you know, "Open this up, you can install in under ten minutes." It actually says, "Open this up, you can install in under two minutes," because what it does is it kind of reinforces that this isn't a huge commitment from them. Finally, the packaging is clear so you can actually see through to the cover and kind of see what you're getting. We did a number of things to try to get the individual to open that up quickly.

Additionally, one of things we follow up is if, you may have experienced this, when you make a purchase on Amazon you sometimes get an email from the company that sold you the purchase, checking in on how it went. Usually, that's designed to turn around and write a review, what we did with this particular client is we made that first email be all about installation. What we said is, "Hopefully by now you've installed your car seat and have taken some amazing rides with your dog. Next paragraph, if you haven't you should know that there are clear videos that show you how to do this that we reference inside the package if you'd just be willing to open it up." We actually speak to the fact that we acknowledge some folks haven't even opened it up yet, right? Instead of having any judgment around that, it's really just about meeting your customers where they're at.

Again, this definitely applies in this scenario. You know in a more complex sale, a software implementation, somebody buying business consulting, you know there's going to be more in person interaction so you're going to know more about their persona but the moral of the story is there are ways to get around the fact that you may not have pure access to the customer in the way you would like. This we find predominately comes with folks that sell online through

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third party sellers, or people who sell via retail but they're a wholesaler and they are putting their product in a retail shop. It's all about trying to establish that relationship with the end user and trying to anticipate their needs.

**Audra:** That was Joey Coleman, experience design expert, reminding you that with today's on-demand, next day delivery, any color you want shopping experience that there is one last great differentiator available. The experience your customers have with you, if you get the first one hundred days of the relationship right, then you've got a customer for life and one who will be your best marketing evangelist. To learn more about Joey and find out how he can help you shape your customer's experiences go to joeycoleman.com