



Journey Mapping

What happens if you train your people to deliver world-class service and they leave you?



What happens if you don't
and they stay?



State of Service



A silhouette of a person standing on a large rock, looking out over a sunset. The sky is a gradient of blue and orange, with the sun low on the horizon. The person is on the left side of the frame, and the rock they are standing on is in the foreground.

World Class Starts At The Top

- Executive Sponsorship

A silhouette of a person standing on a large rock, looking out over a sunset. The sky is a mix of blue and orange, with the sun low on the horizon. The person is on the left side of the frame, and the rock they are standing on is in the foreground. The background shows a vast landscape with more rocks and a distant horizon.

World Class Starts At The Top

- Executive Sponsorship
- Service Aptitude Starts At The Top



Ben Baldanza
CEO, Spirit Airlines

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Keynote Artist



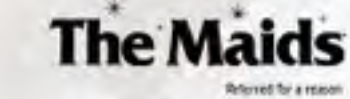
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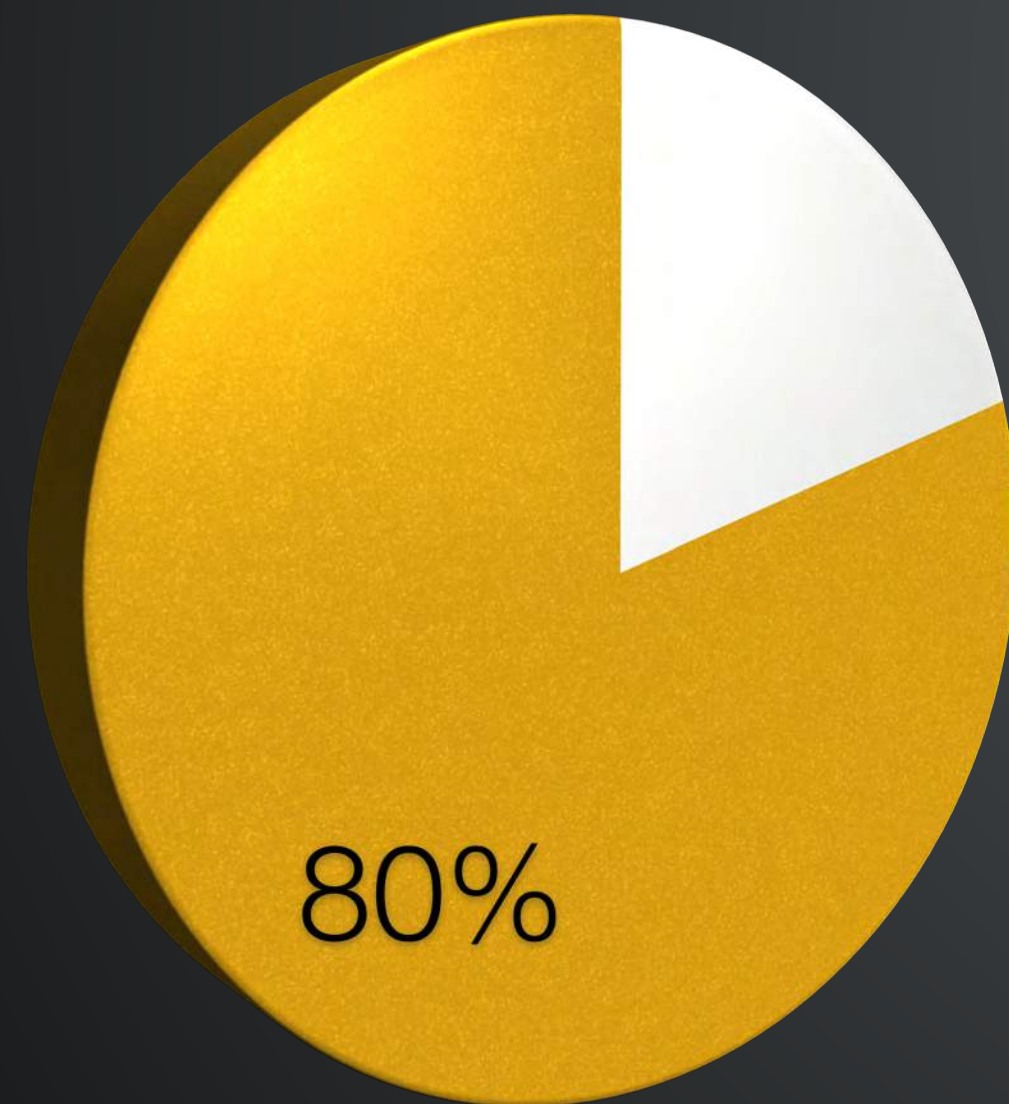
AVEDA

Superior Service?

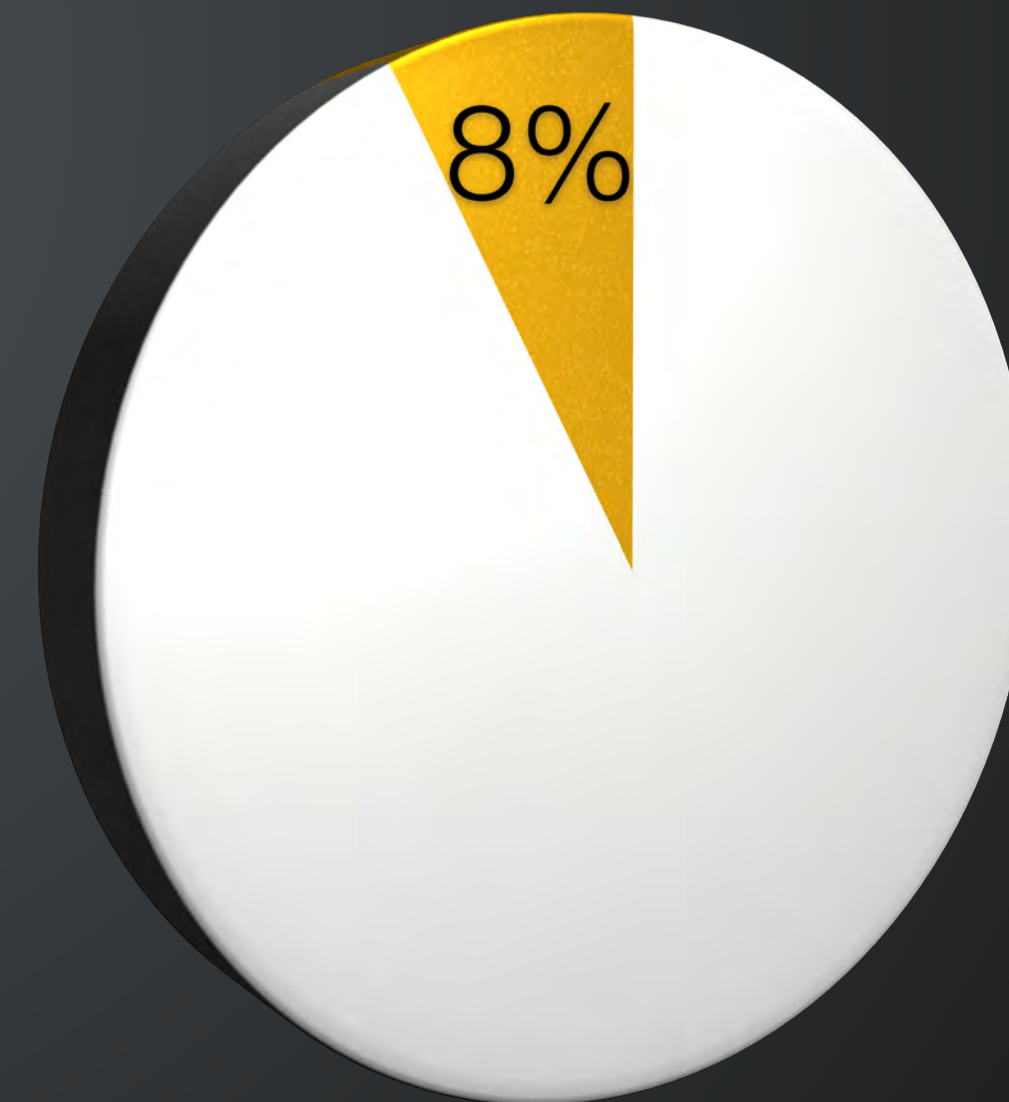


Superior Service?

300 Organizations

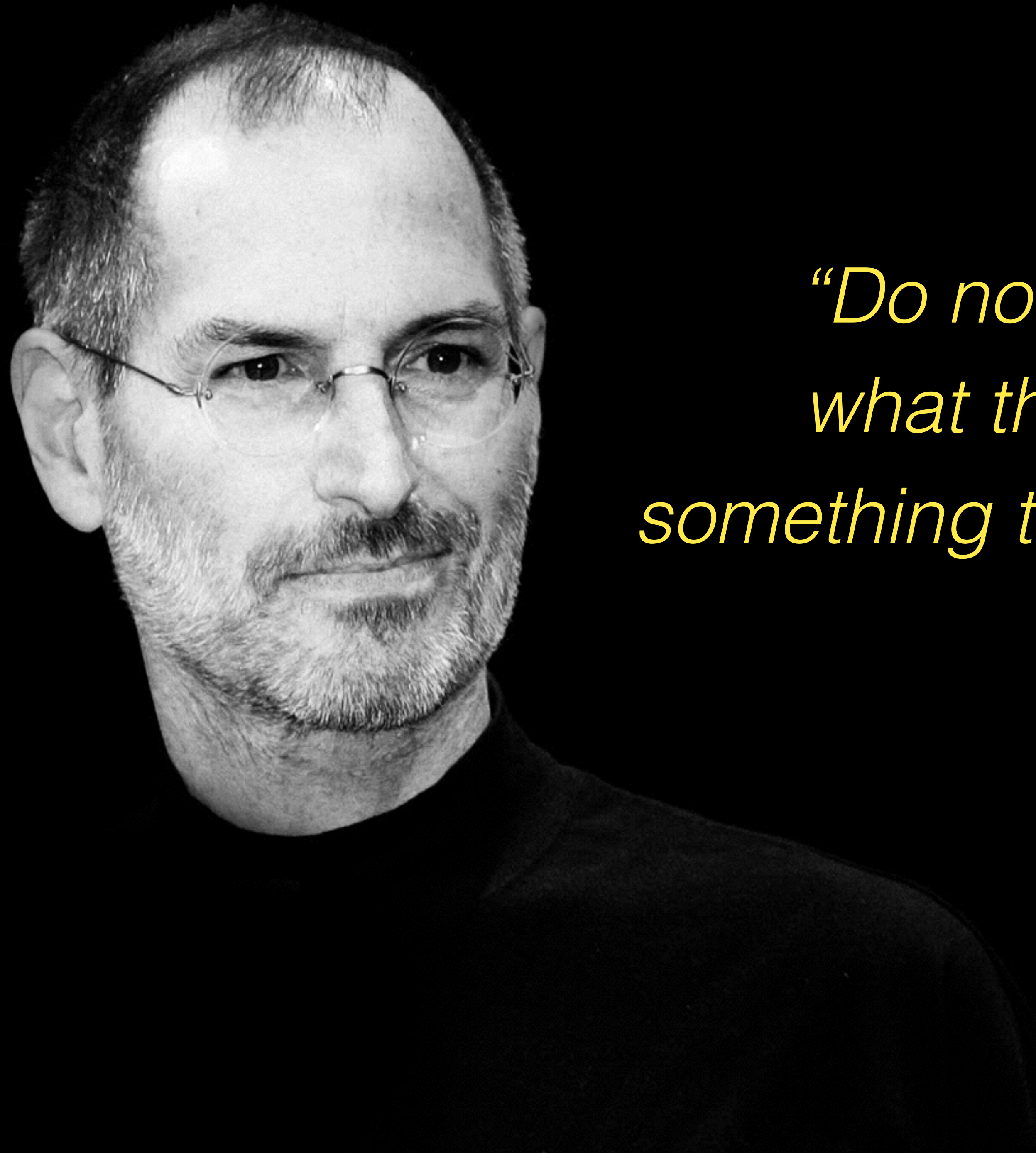


3000 Customers



*You are in the
customer perception business*





*“Do not ask the customers
what they want, give them
something they cannot live without.”*

Steve Jobs



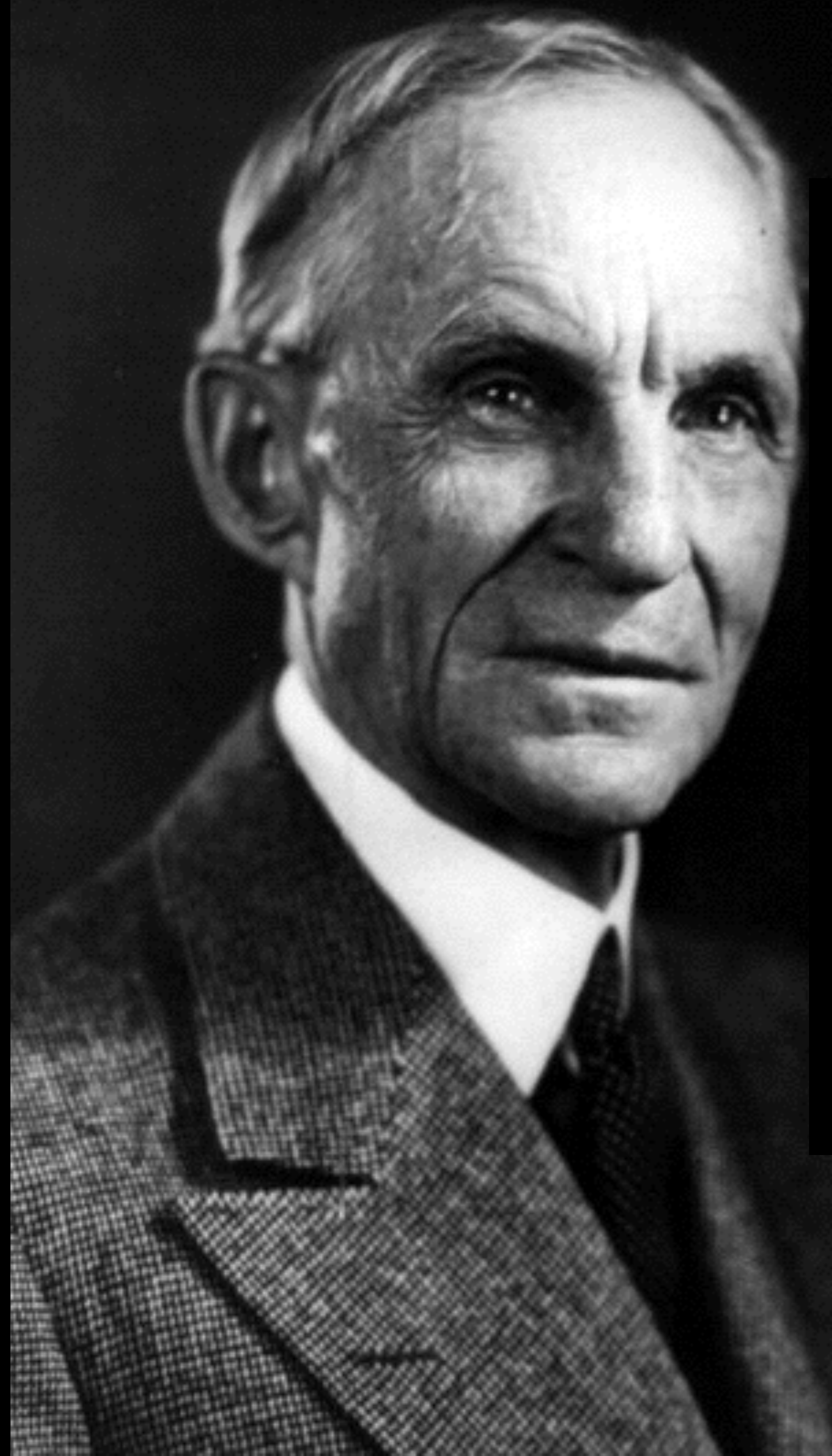
Zappos!
com



amazon





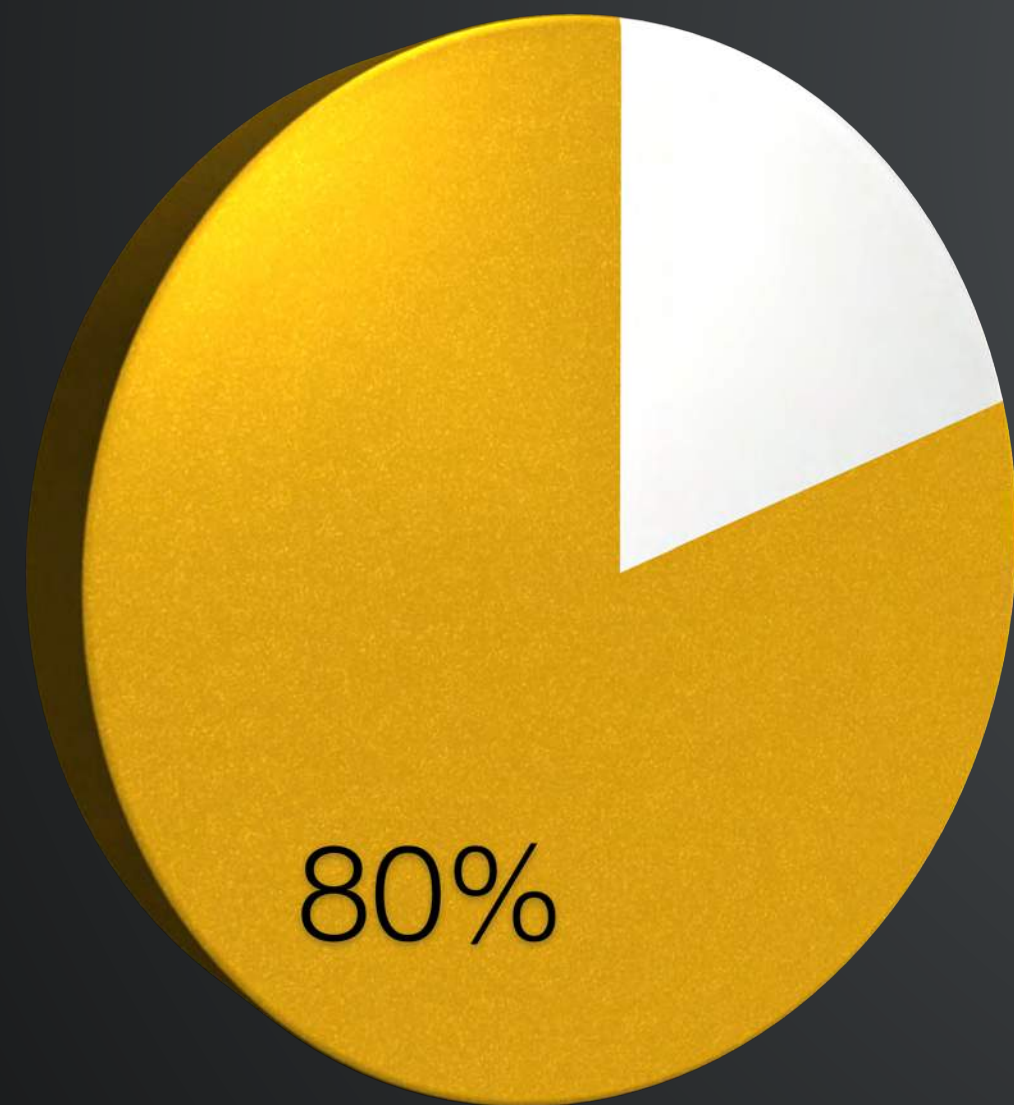


“If I had asked people what they wanted, they would have said faster horses.”

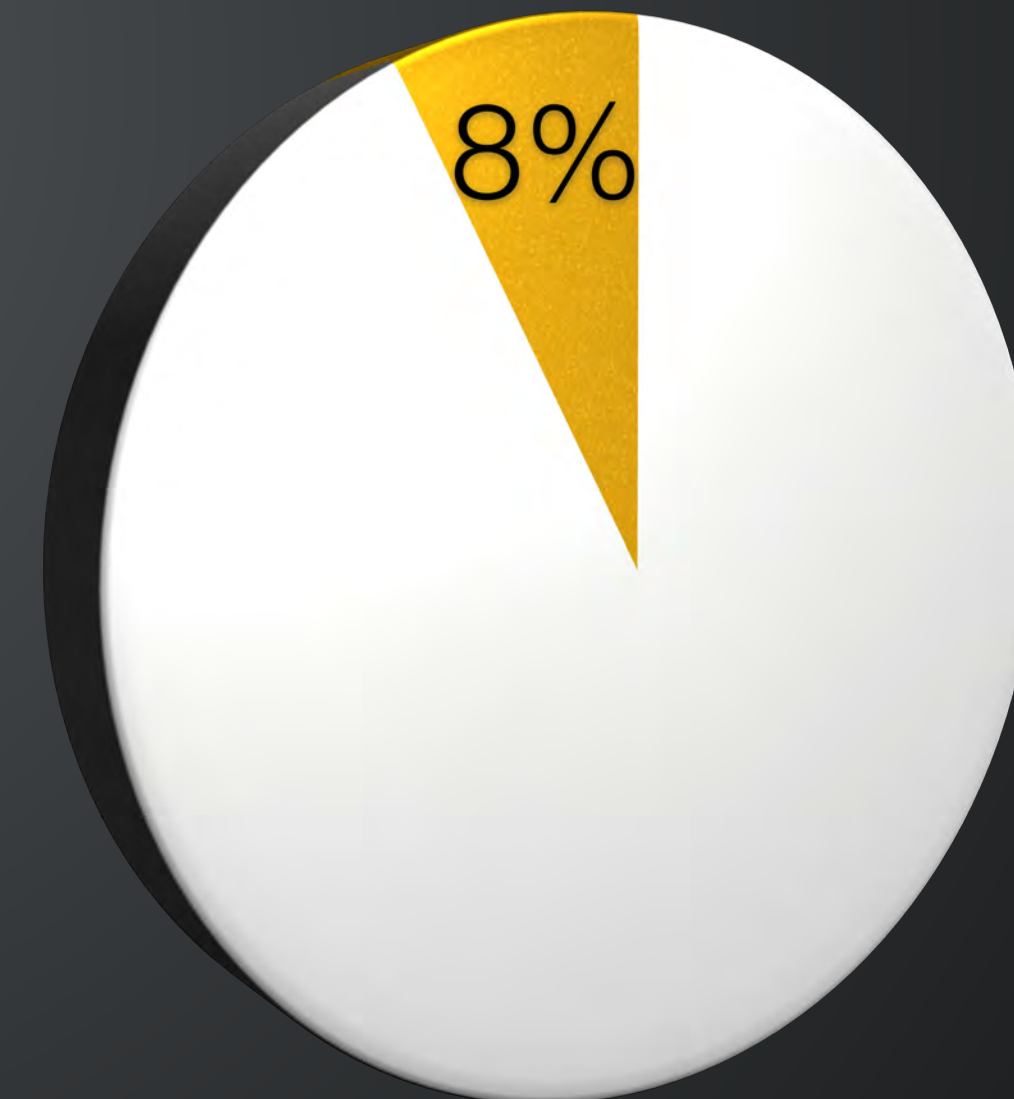
Henry Ford

Superior Service?

300 Organizations



3000 Customers





*Employee apathy creates
customer apathy*



*Customer apathy is the enemy
of a successful company*



Compassion & Empathy



World Class Service

- Service Aptitude
- Paranoid about their CX
- Shoes of your Customers



What is a

Customer Service

Revolution?



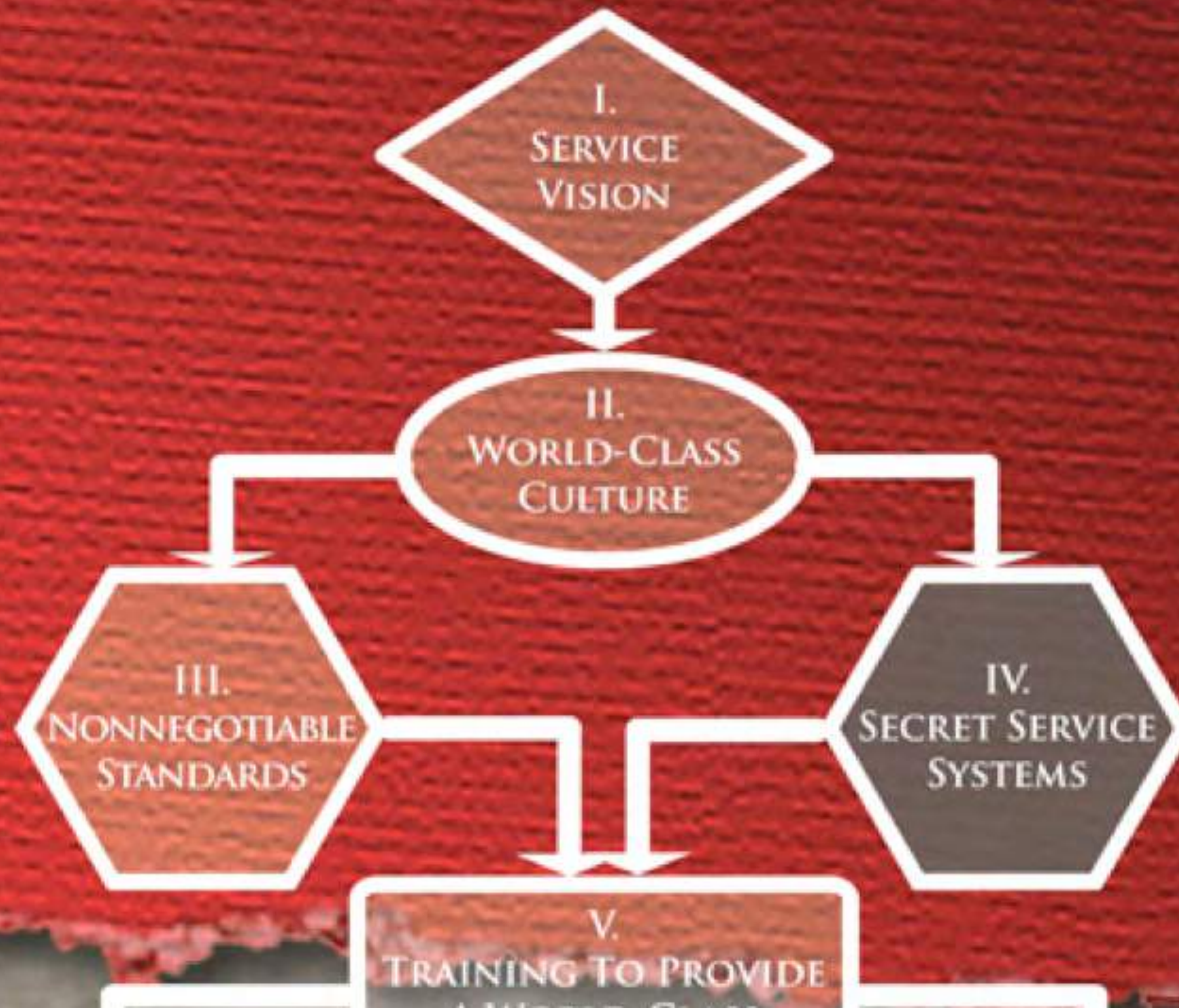


\$500 Haircut
\$1,000,000 Keynote



Commandment IV

Secret Service Systems





Secret Service System

- No Cost
- Simple To Execute
- Zero Impact On Productivity
- Wows Customer

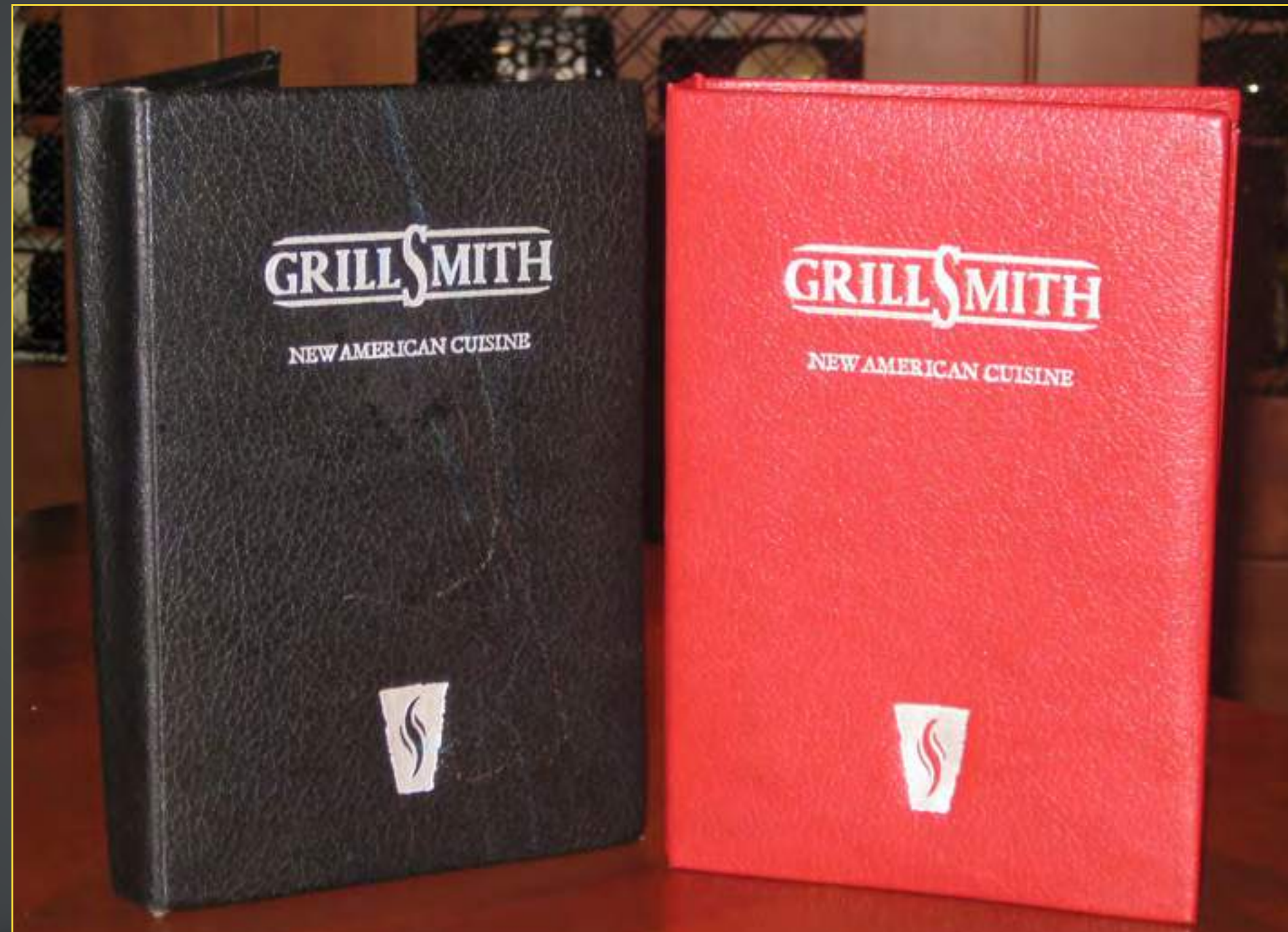


Silent Cues

Visual Triggers







FOR D

WHO

Name:

Company:

Preferences:

FAMILY

Spouse:

Children:

Pets:

OCCUPATION

Title:

Accolades:

Preferred Communication:

RECREATION

Hobbies:

Vacations:

Reading/ Music:

DREAMS

Personal:

Professional:

Interests:



Quote Sheet

Additional Services/Special Projects

| | |
|-------------------------------|--|
| Apt. Complex _____ | Emergency 60 Min. Clean _____ |
| Concrete _____ | Deck _____ |
| Chandelier _____ | Garages _____ |
| Light Fixtures _____ | Kitchen Cabinets _____ |
| Light Bulbs _____ | Grill _____ Oven _____ |
| Mirrored Walls or Doors _____ | Vacuum Mattress _____ |
| Refrigerator _____ | Vacuum Draperies _____ |
| Wash Walls _____ | Hand Wipe Blinds _____ |
| Wood Paneling _____ | Fireplace(s) <small>(inside)</small> _____ |
| Plants _____ | Polish Silver _____ |
| Pantry _____ | Floors: Wood: _____ Tile: _____ |

Carpet Cleaning

| | |
|-------------------------------------|------------------------|
| Number of stories _____ | Price Quote _____ |
| Room Count _____ | Carpet Condition _____ |
| Carpet Damage/ Location _____ | |
| Carpet Instructions and Notes _____ | |
| _____ | |

Windows

| | |
|---------------------------|----------------------------|
| Number of stories _____ | Damaged window/glass _____ |
| Front Windows _____ | Other _____ |
| Back Windows _____ | Other _____ |
| Right Windows _____ | Other _____ |
| Left Windows _____ | Other _____ |
| Wash Inside _____ | Other _____ |
| Wash Outside _____ | |
| Window Instructions _____ | |
| _____ | |

| |
|------------------------|
| Additional Notes _____ |
| _____ |
| _____ |
| _____ |

Family

Occupation

Recreation

Dreams

Talking & Waiting

Asking & Listening



LINDSEY

Team Member Since 2003

My passion is being a mom





Secret Service Allowance



A study conducted with Radiologists



Group 1

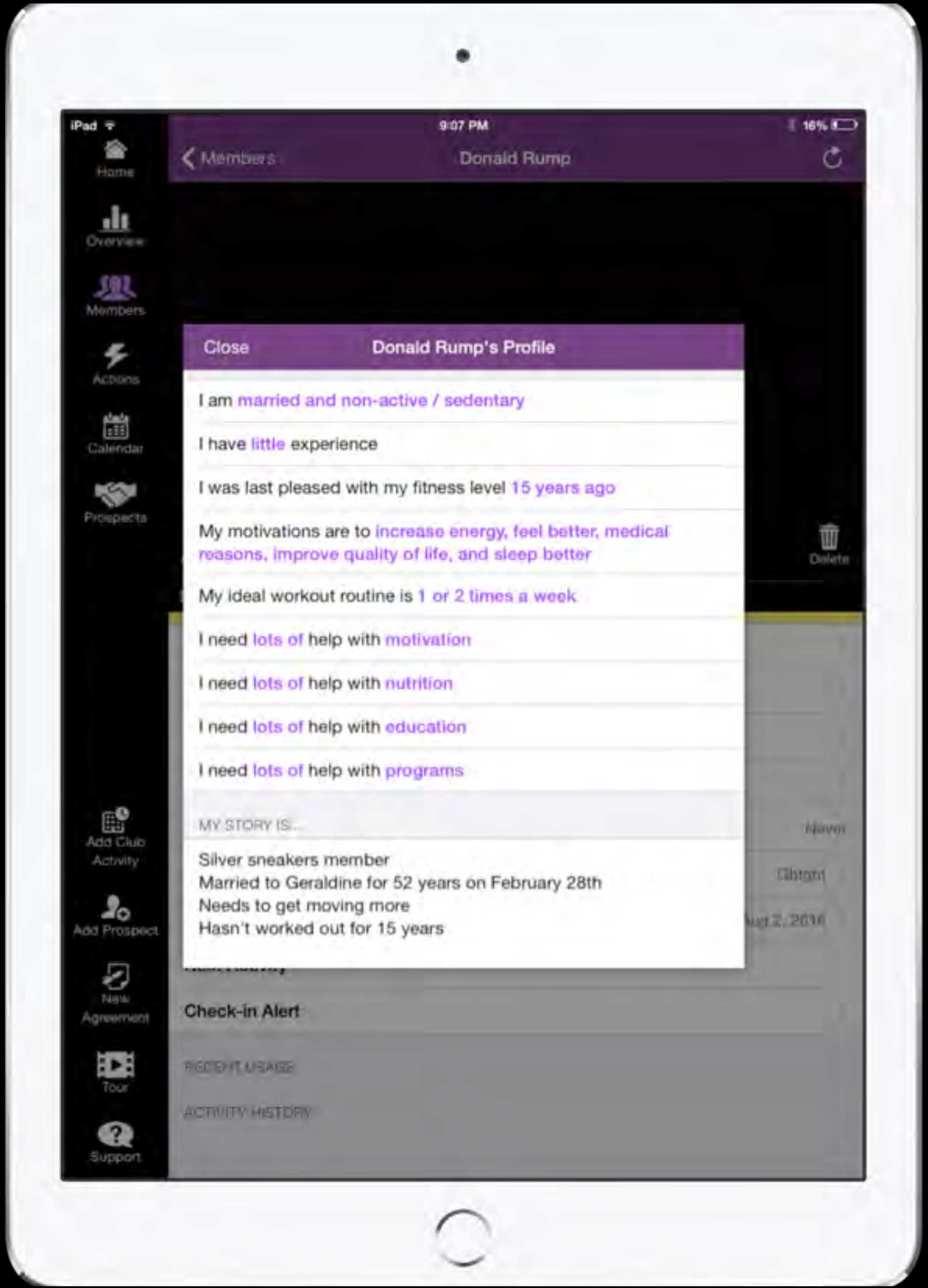


Group 2



who's in the club





Home
Overview
Members
Actions
Calendar
Prospects
Add Club Activity
Add Prospect
New Agreement
Tour
Support

Close Donald Rump's Profile

I am **married and non-active / sedentary**

I have **little** experience

I was last pleased with my fitness level **15 years ago**

My motivations are to **increase energy, feel better, medical reasons, improve quality of life, and sleep better**

My ideal workout routine is **1 or 2 times a week**

I need **lots of help** with **motivation**

I need **lots of help** with **nutrition**

I need **lots of help** with **education**

I need **lots of help** with **programs**

MY STORY IS...

Silver sneakers member
Married to Geraldine for 52 years on February 28th
Needs to get moving more
Hasn't worked out for 15 years

Check-in Alert

RECENT MESSAGE

ACTIVITY HISTORY

Delete

What Secret Service might you have right now...

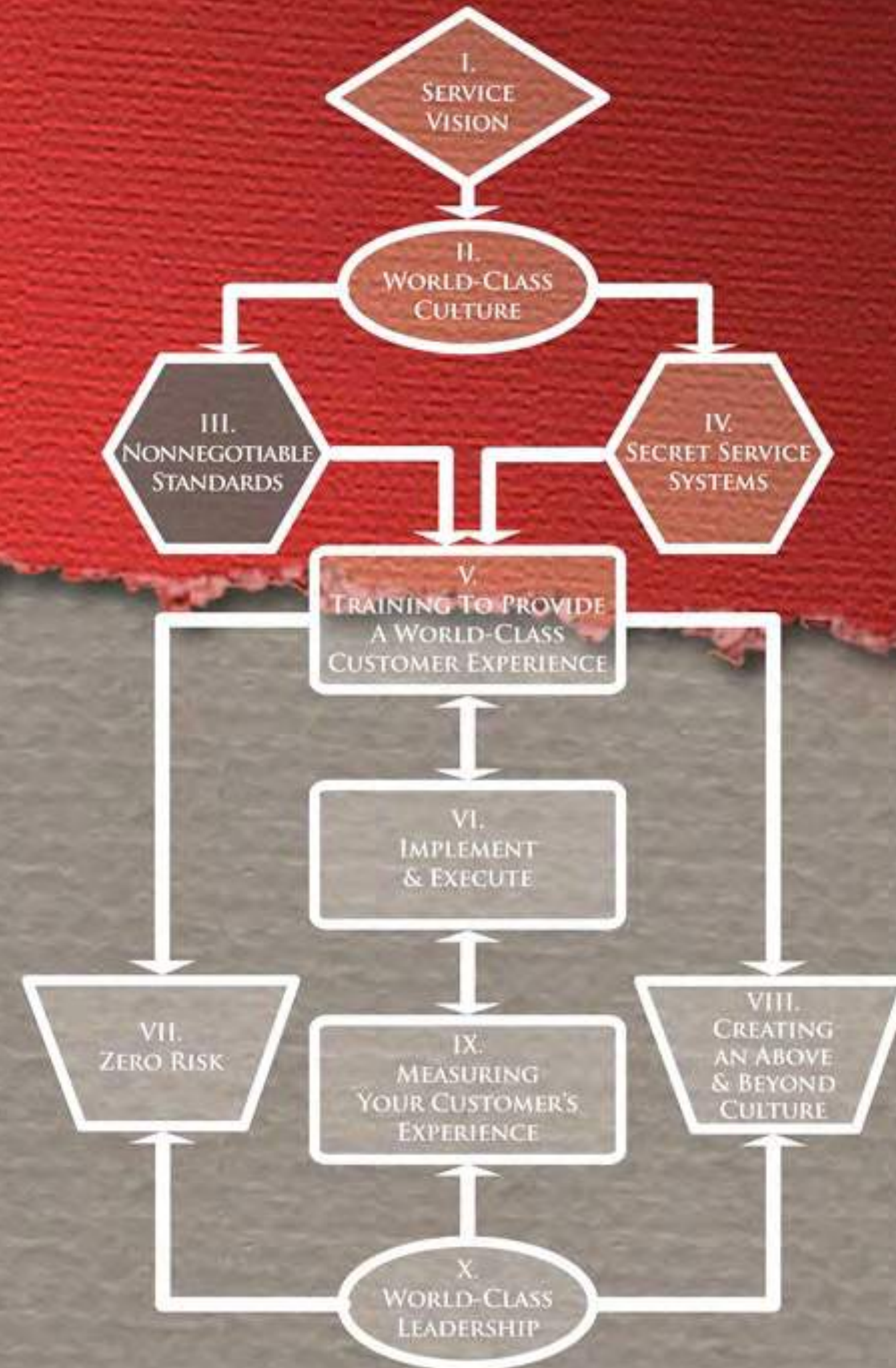
...That you are not using?

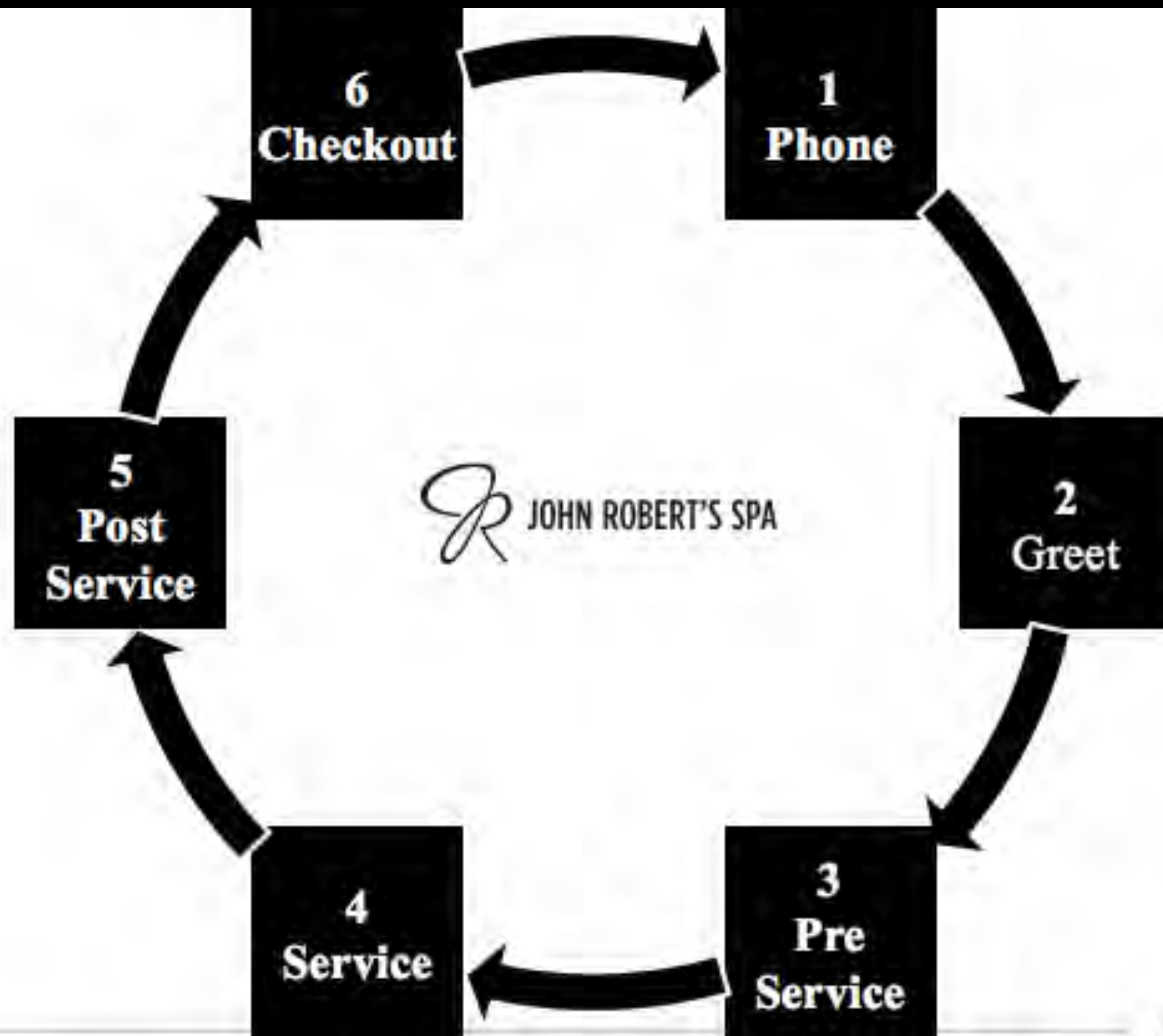
Secret Service?

1. Roses for every female client on Valentine's day?
2. Umbrella's for any guest that needs them
3. Asking how their son is doing in college
4. How their job at Progressive Insurance is
5. Telling your Customer she has put on at least 10 pounds since you saw her last?

Commandment III

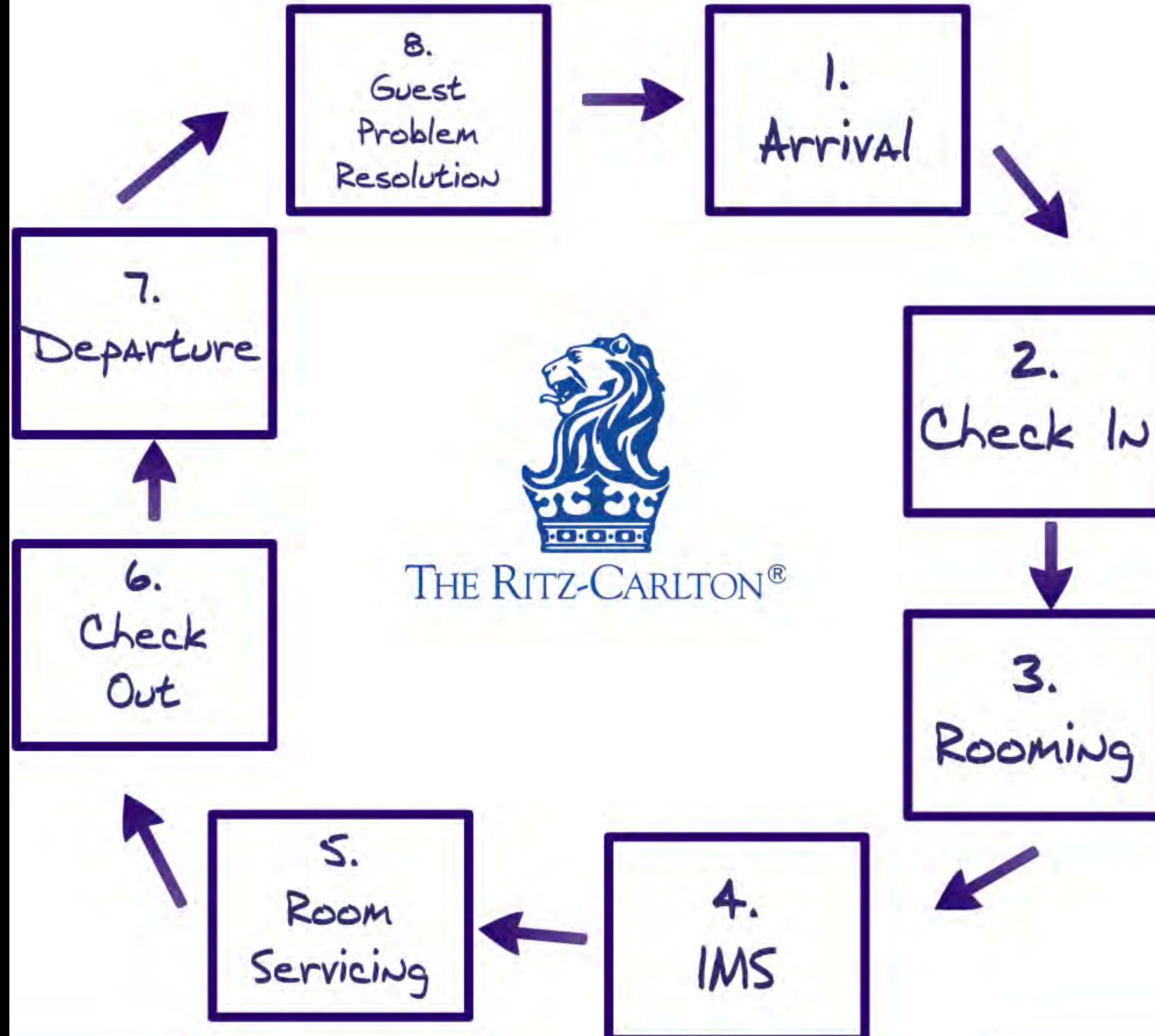
Non-Negotiable Standards

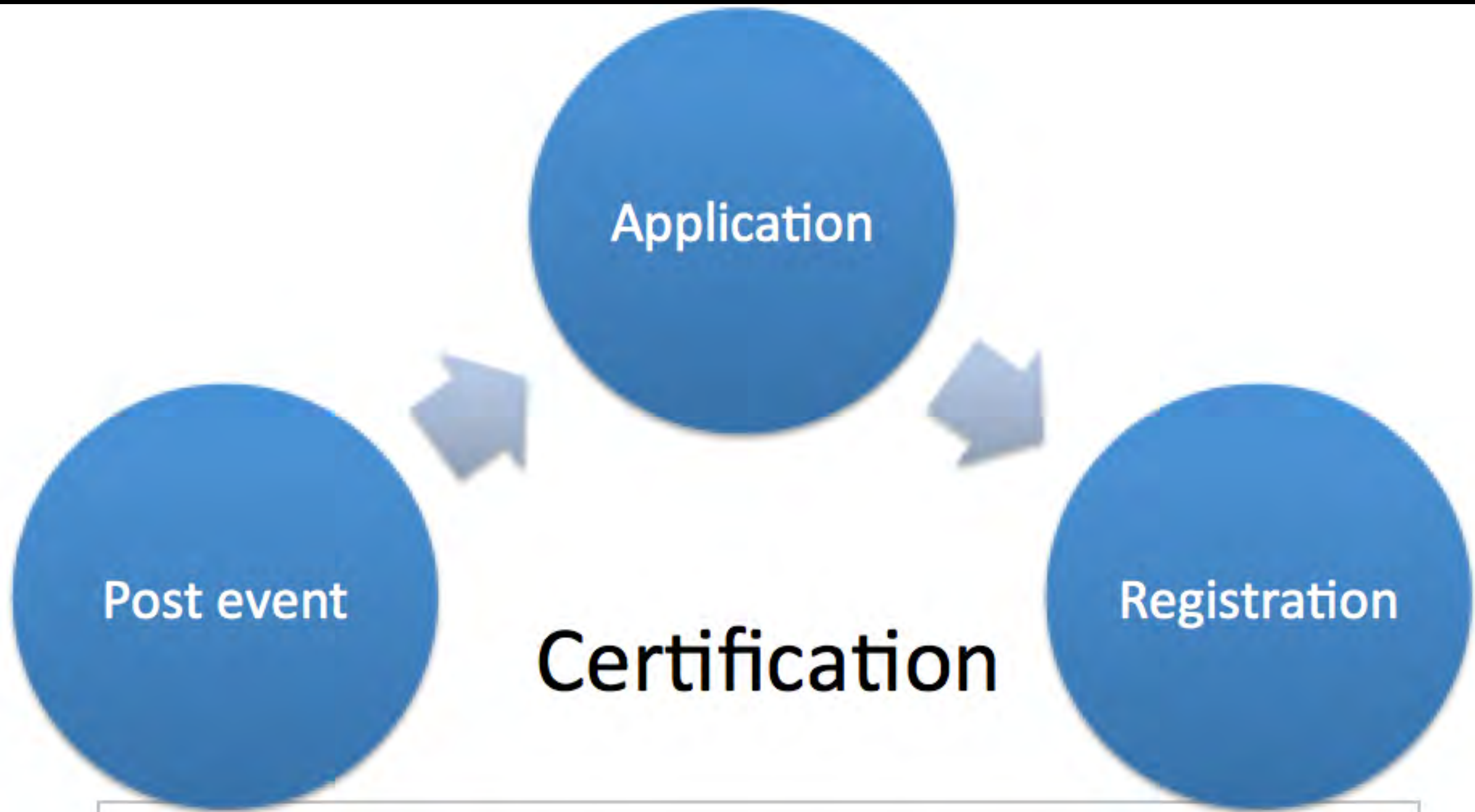






Resort Experience Cycle

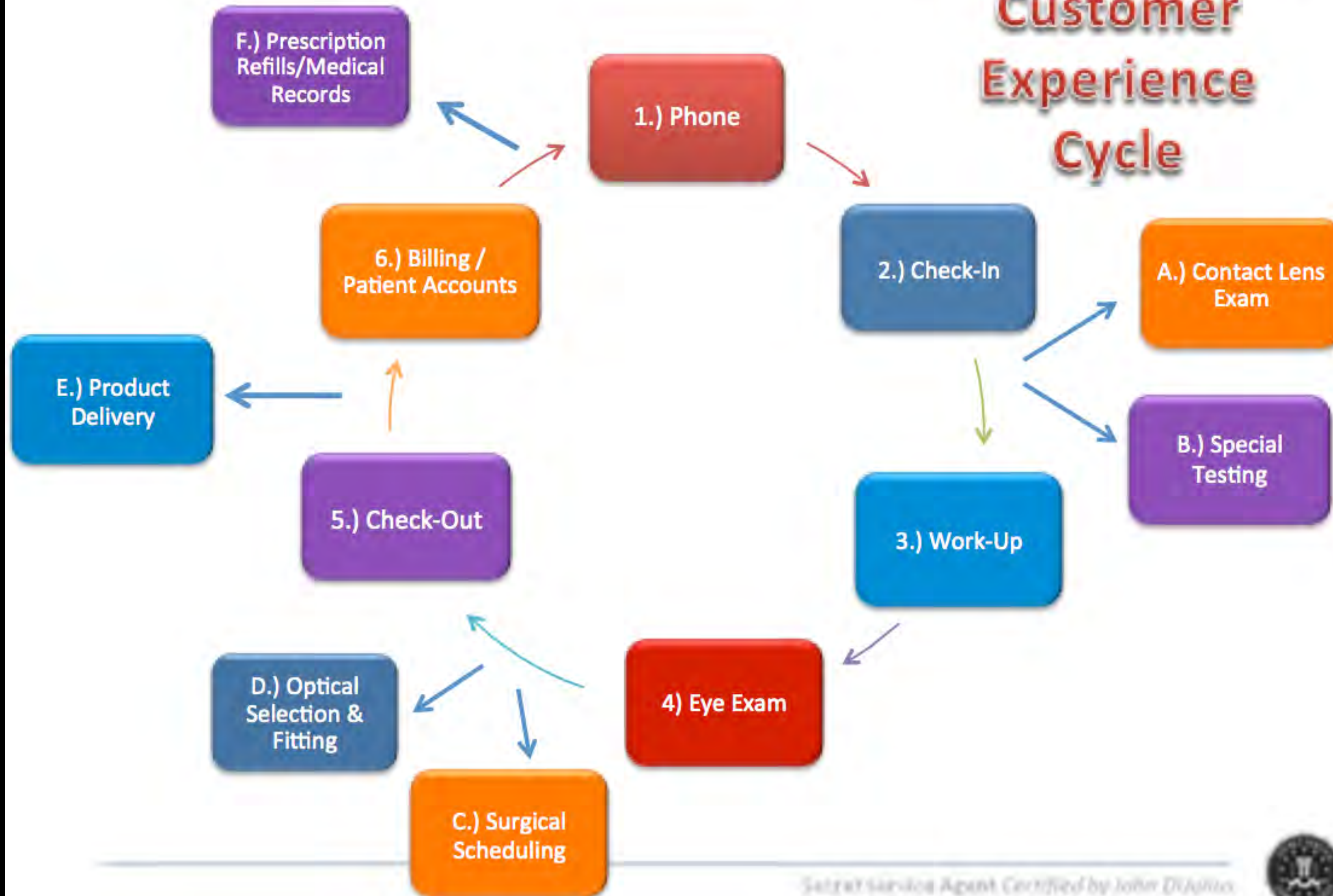


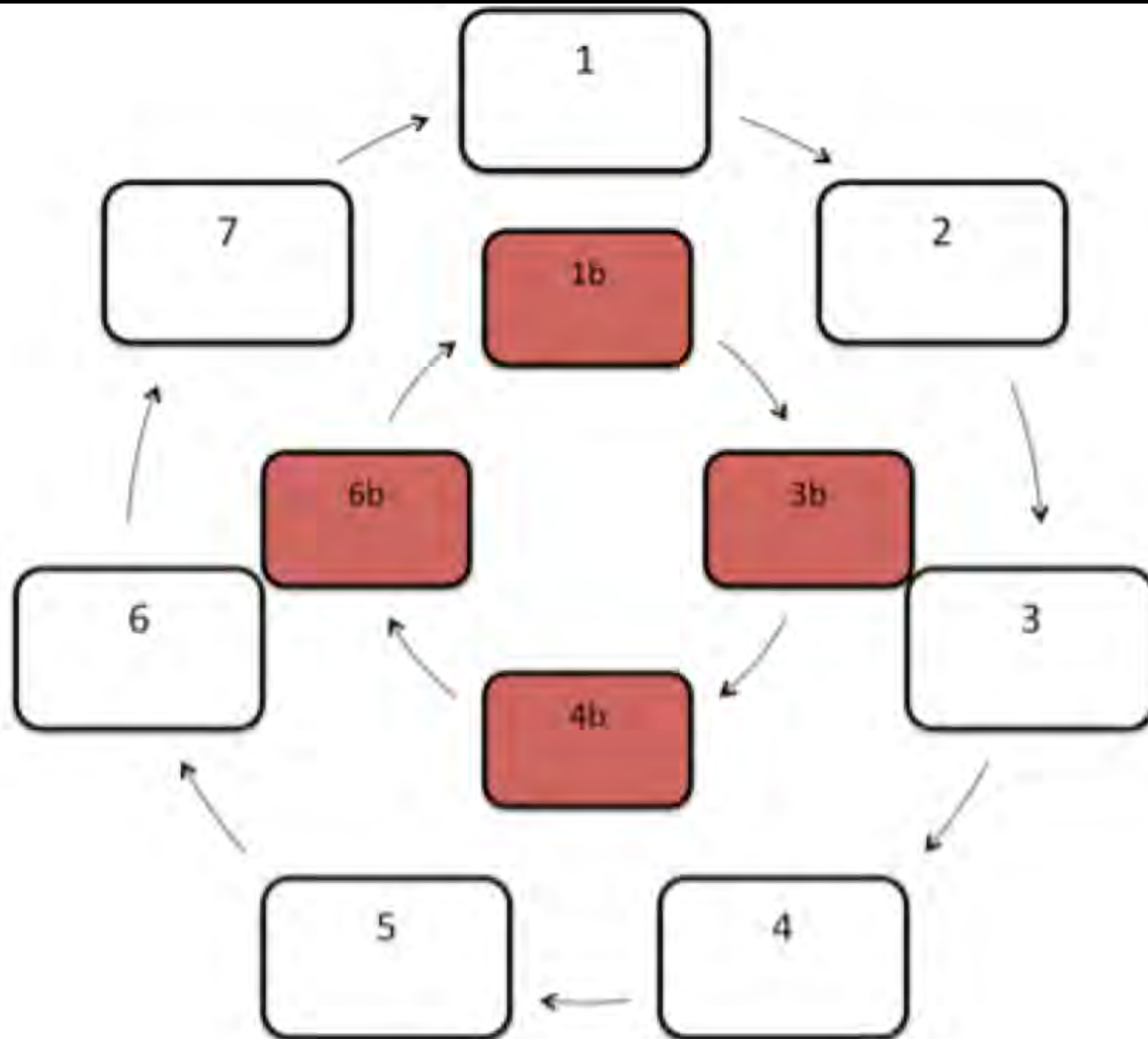


Click to add subtitle

GAILEY EYE CLINIC

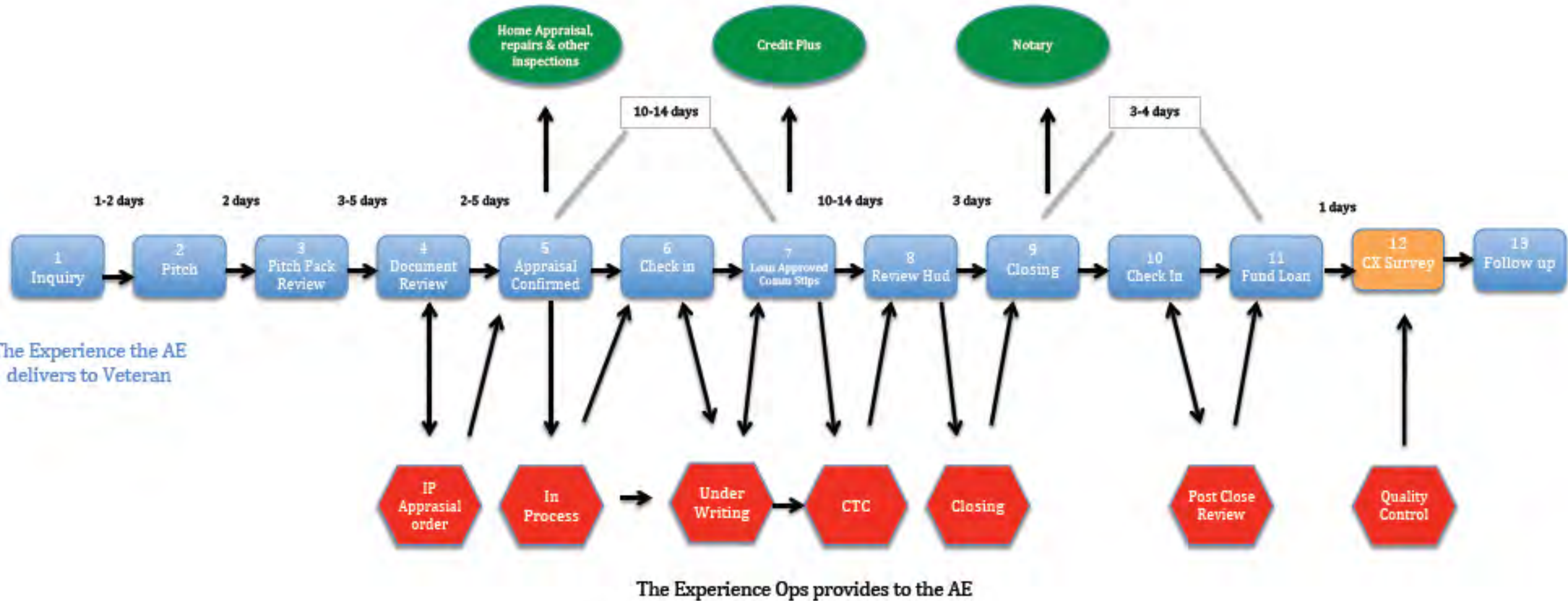
Customer Experience Cycle



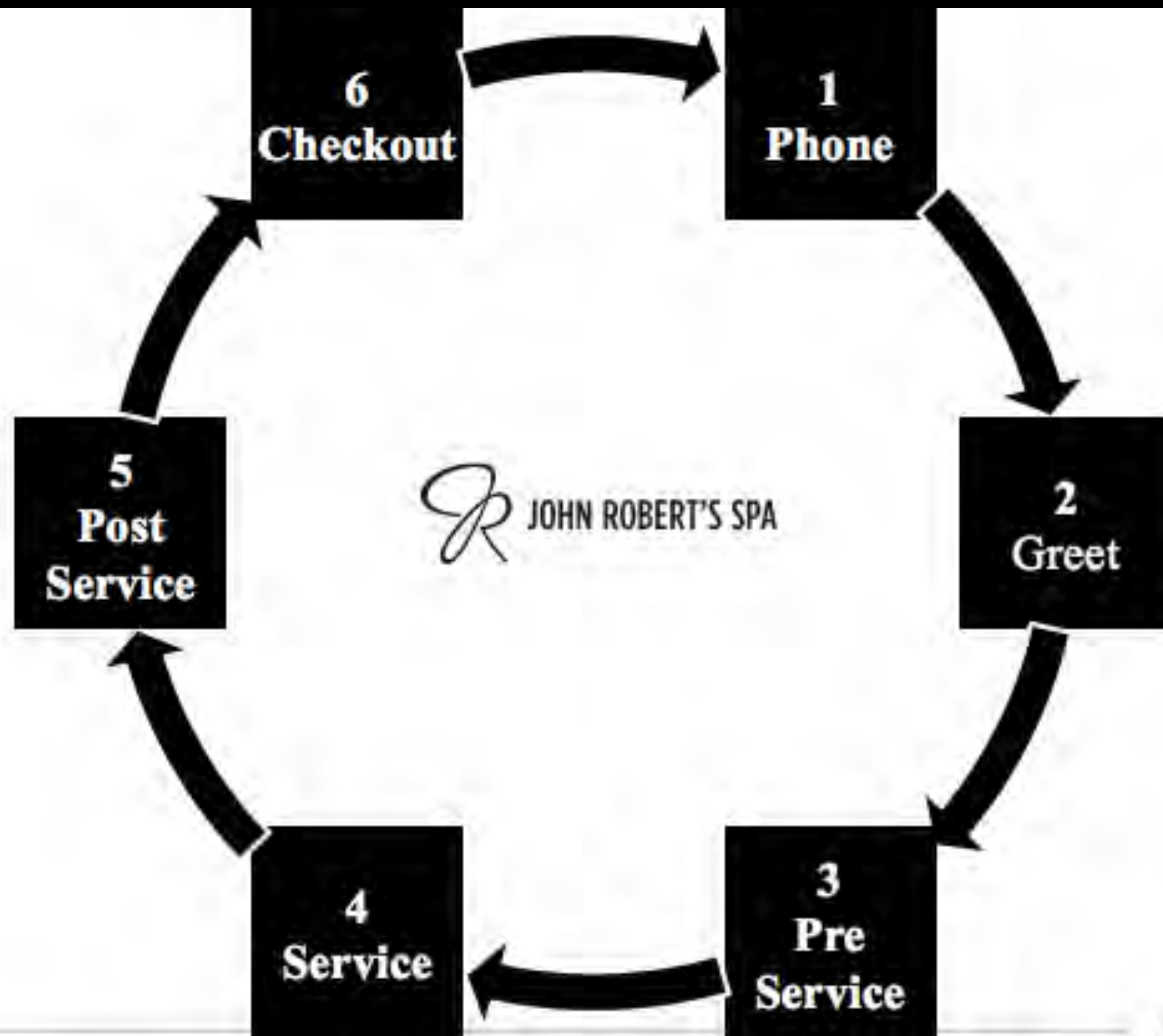


NewDay USA Core Veteran Experience

Third party vendor Experience







TELEPHONE

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Service Defects

- No or improper welcome
- Lobby not clean or stocked
- Cleanliness-everything they see, lobby work station, parking lot
- Employees taking up space in lot

Standards

- Seasonal decorations
- Cleanliness/appearance
- Lobby supplies stocked
- Smile and make eye contact
- Greet customer upon entry by saying "hello" by being energetic and enthusiastic
- Available teller invite customer to the window by raising paddle
- Offer candy at window

Above & Beyond

- Greet customer by name and welcome back
- Special assistance for elderly/disabled. Assist with disability counter
- Free water
- Hand sanitizer

Operational vs. Experiential

Operational Standards

The “service” portion of the interaction. Employees have to execute in order to complete the transaction. Your competitors do it and it is unnoticeable by the customer unless it is not done.

Experiential Standards

Actions that team members do not necessarily “have” to execute (even though it may be a company non negotiable standard). It is what makes the customer say “WOW”, a delightful surprise (knowing the customer’s names, company history, personal history, preferences ready before they even ask, etc.). It is the reason why our customers return, refer others and become brand evangelists.

Operational vs Experiential

- Have to execute in order complete the service transaction
- Our competitors do it
- Unnoticeable by the customer unless it is not done
- Service/transaction can be delivered without execution
- Is a WOW moment
- Not delivered by majority of competitors

Operational vs Experiential

- Receptionist greets you
 - Asks for name on the reservation
 - Asks to see your driver's license & credit card
 - Has you initial the room rate & day of departure
 - Hands you your room keys
- Receptionist executes the 5 E's
 - Eye contact
 - Enthusiastic greeting
 - Ear to Ear smile
 - Engages
 - Educates
 - Asks how your trip in from Chicago was (from your driver's license).
 - Ask if there is anything else we can do for you today

**Operational
vs.
EXPERIENTIAL**

A Quiz

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Give Guest Valet Ticket

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

No one to greet guest

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Using a guest's name 2x

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Recognize guest by name
before they give it to us

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Ensure guest is
aware of room rate

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Ask the guest how Chicago is
this time of year

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Guest's room is not
ready at check in time

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Guest is welcomed back

**Service
Defects**

**Operational
Standards**

**Experiential
Standards**

**Above & Beyond
Opportunities**

Guest's correct room is
ready upon their arrival

DO NOT FOCUS ON

- Policies & restrictions
- Limitations, excuses and the “how can we”
- 3% of Clients who may have bad intentions
- Uncontrollable issues
 - Out of inventory
 - Policy of Company
 - Not in budget

DO FOCUS ON

- Silent Cue's & Visual triggers distinguishing between
- New vs Existing vs VIP
- Secret Service Systems
 - Capturing/documenting customer intelligence
 - Retrieving it

Customer Experience Cycle

- Team Building Exercise
- Front line buy in
- Non negotiable standards reducing variations and inconsistencies
- Awareness to all the Service Defects
- Awareness to all the Above & Beyond Opportunities
- Emphasis on Experiential Standards
- Increased Service Aptitude
- Training manuals & tests



Mosaic Experience *Post Service?* *Customer Success?*

Service Defects

- No Follow-up - unhappy
- unhappy customer
- Lack of active business
- Lack of follow-up on issues (email)
- no FORD system
- lack of client retention process
- post project errors
- Not tracking client history/^{major} past clients

Operational

- Client follow-up process
- Client retention process
- Client history tracking

Above & Beyond

- Client success stories
- Client testimonials
- Client referrals
- Client loyalty



DISCOVERY STAGE

SERVICE DEFECTS

- Not setting expectations
- Cold transfer
- Not validating capacity
- Not providing documents in time
- Appropriate resources are not on discovery call

STANDARDS

- Conduct discovery call
- Collect notes and FORD in Salesforce
- Consultative sales and recommendations
- Re-qualify Client
- Proposal presentation
- Contract review and negotiation
- Collect signatures
- Send welcome package

ABOVE & BEYOND

- In person proposal presentation
- Thank you with at least one FORD
- Special level swag





SMITHERS
QUALITY ASSESSMENTS



**Journey
Mapping**