

Leading the Experience™ Best Practice Guide

HAVE QUALITY CUSTOMER CONVERSATIONS

1. Get organized and create a follow-up calendar. Schedule time for the initial outreach, Quality Conversation, and any necessary follow-up actions based on the timeline for your company's program.
2. Reach out to the customer to schedule the call with a short email of thanks and a request to have a ten-minute call to discuss their results.
 - Include a conversation-starter question within the email: "I have a couple questions about your feedback. In particular, I would like to hear more about [insert strength or area for improvement indicated in their survey results]."
3. Create a quick reference card to keep by the phone that contains bullet points for what you'd like to remember during each call (e.g., ask "What else/who else," thank them for their feedback, etc.).
4. Develop a voicemail script with a few talking points to use so you are prepared and sound confident if prompted to record a message.
5. Determine with your team ahead of time the number of call attempts you'll make when clients don't call you back. Doing so prevents you from "annoying" customers or looking like you're "not trying hard enough" to follow up.
6. Develop a plan for holding yourself accountable to conduct calls and register outcomes on a consistent basis (e.g., set a reminder on your calendar once a week to review and take action on tickets and follow-up).
7. For an above and beyond experience, have company leaders call top customers to show appreciation for their business either through a Quality Conversation or as a follow-up to one. (Don't forget to register the outcome!)