



# SIX BEST PRACTICES

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Translate Your Customer Experience Vision Into  
Powerful Frontline Behaviors

## WHY READ THIS WHITE PAPER?

1. According to Gallup's 2013 study "State of the American Workplace," 70% of employees are not engaged at work.
2. Most organizations aren't doing what it takes to engage their people from the start and ensuring they stay that way.
3. This white paper highlights specific practices that best-in-class organizations are applying to change that statistic and empower their employees to deliver their customer experience visions through powerful frontline behaviors.

## What Defines The Best?

In a world of product parity and increasing consumer demands, the brands that will rise to the top and stay there will be those who find a way to harness their most powerful and differentiating asset – their people. That's why brands like Apple, The Ritz-Carlton, Disney, Macy's, and Starbucks are so celebrated when it comes to the brand loyalty of their customers.

Each is a powerful brand that is synonymous with customer experience. It's time to ask the question: **What are they doing specifically with their people that make them so consistently successful and leave the rest behind?** To find out, we studied these elite brands extensively and monitored their success in the marketplace. We found they take three major types of action:

### 1. ENGAGE THE HEART

With the 70% statistic looming large, companies must re-think the traditional notions of engagement. It's no longer enough to send out an engagement survey and follow up with surface improvements like changing the space or improving technology. The best companies have realized that they have to go a step further and not just engage employees, but engage them around a specific customer experience vision.

They must rally them around a single mobilizing purpose each employee can own and control.

Employees need to feel that they each play an integral role in delivering a purpose they deeply care about and that makes the world a better place. This is infinitely more powerful than changes to the lunchroom.

### 2. ENGAGE THE MIND

Elite brands have realized that **having employees believe in the vision is not the same as enabling them to consistently deliver on that vision.** You must not only capture your employees' hearts, but also their minds. You must give them the knowledge, skills and tools they need to translate their motivation into consistent actions.

### 3. SUSTAIN

Finally, leaders in the marketplace are those that understand not only how to capture their people's hearts and minds, but how to sustain that engagement over the long term.

On a daily basis, they inspire and enable their people to deliver customer-centric behaviors that drive loyalty.

**Executing on the powerful combination of the heart, the mind, and sustainment is what defines the best.**

The Heart  
+ The Mind  
+ Sustainment  
= THE BEST

## Six Best Practices for Engaging Your People

Ready to bring that powerful formula to life in your own organization? By leveraging our experiences across a broad spectrum of organizations and industries, we have distilled six best practices that will help you do that.

In fact, we've recently designed and implemented a successful program for a large global automotive brand based around these practices and executed through the lens of immersive hospitality. It started when the brand came to us with a problem: dealership survey results showed frontline staff were delivering poor experiences to customers and their satisfaction scores reflected this.

We developed a unique solution based on a one-day workshop for 900 Service Advisors and replicated the experience in 14 cities across the country over the course of 2 months. The solution included post-workshop role playing where each Service Advisor practiced his or her hospitality skills over the phone with a Performance Coach. There are six best practices we touched on, and they are instrumental in transforming brand experiences that drive loyalty.

### BEST PRACTICE 1: Start With Your Customer

When most organizations sit down to design an employee program, they ask the obvious question: **“What do we want our employees to do?”**

Elite brands ask a very different and much more powerful question: **“How do we want our customers to feel?”**

When you begin designing a program, start by asking:

- What do our customers care about?
- What are they telling us?
- What promises should our employees be delivering on that will make customers feel delighted and drive their loyalty?

When we stopped to listen to the feedback, it gave us some powerful direction: Customers felt competing brands were more “hospitable,” and that’s why they were choosing them.

Service Advisors had to think very differently about how they treat customers, and rally around a brand promise they could deliver:

**“Treat every customer with the grace and hospitality associated with a Professional Butler.”**

The challenge was how to get dealership Service Advisors to deliver service with the finesse and grace of a Butler. One of the first things we did was understand what that would look like in a dealership. How would it come to life on the floor between the Service Advisor and the customer? We call these the moments of truth.

Take, for instance, the experience one might have while having his or her car serviced at a dealership.



Let’s say you’re pulling your car up to the service bay at a dealership. It’s 7:00AM. You’re tired and worried about how much this next visit is going to cost. A Service Advisor opens your door – this split second is a moment of truth. Are you greeted warmly? Is your name remembered? Are you handed a warm beverage? Did the advisor ask questions based on your last visit? This is a moment that, as a customer, can make your day or ruin it. **And this is an experience that, as a brand, can build loyalty or break it.** Identifying powerful moments like these is important. But even more important is what we did next.

We took each moment and distilled them into behaviors we could teach employees – behaviors they could own, control and, most importantly, repeat time and again with different types of customers and in different situations.

These behaviors included things like:

- Greeting a customer
- Building rapport
- Listening
- Showing empathy

#### Starting with the customer and identifying specific customer-focused behaviors had two critical outcomes:

1. Service Advisors now understood not just what the promise is, but exactly what they needed to do to deliver on that promise.
2. Every design and development decision could now be focused on enabling and reinforcing the delivery of that promise.

These insights led us to realize we could do something simple and different that would make a huge impact and break the mold: bring in an actual Butler.



## BEST PRACTICE 2: Break The Mold

Incorporating a Butler at the heart of our design was entirely unconventional. It provided the necessary step-change to break the mold and get the audience to turn off its collective autopilot. Imagine seeing 60 Service Advisors, eyes in their notebooks, and in walks our Butler...

Once past the initial shock (and perhaps skepticism), our audience embraced the concept and turned what could have been a simple training program into a rich, genuine and passionate discussion about how they could deliver hospitality in any situation – good or bad.

The frontline loved Charles the Butler and found it very relevant to have a Butler train them in delivering customer satisfaction. And doing so gave them a new outlook on the importance of hospitality excellence in customer service. One participant had this to say in our post-program survey response:

**“Charles the Butler can enhance everyone’s outlook on life and give them skills that can be taken with them in any life adventure or work career.”**

Here are some other ways you can break the mold in your own programs:

- Go somewhere new and unexpected to generate different perspectives. It can be difficult to think differently in the same environment you interact in daily
- Incorporate novel or surprising activities into workshops or programs that cause people to pause and think about something in a new way (through games, challenges, surprising statistics, etc.)
- Re-think how you communicate with your people...instead of a standard email, what might get their attention in a different way (a short video, etc.)...create “moments of surprise”

## BEST PRACTICE 3: Create Empathy Through Context

Creating empathy through context is closely related to breaking the mold; it is about getting your people to walk a mile in the shoes of your customer. Our immersive hospitality experience unfolded at a luxury hotel – an environment that embodied the hospitality principles, and demonstrated the Butler-inspired behaviors we were reinforcing in the session. It helped Service Advisors think about aspects of the dealership service experience they had not considered before. For example, by experiencing it at the hotel, one advisor realized how intimidating it could be to find a place to park your vehicle – something he hadn’t considered in relation to parking at the dealership.

Taking a different perspective is powerful. Now Service Advisors didn’t just understand what the right behaviors were, they also understood how it felt as a customer – both good experiences and bad. This is a critical element of internalizing behavior and bringing it to life in different situations, and with different customers.

One participant said:

**“myPractice opened my mind to how my customers are feeling.”**

## BEST PRACTICE 4: Practice

In an immersive workshop, it is critical to get participants from sitting passively in their chairs to participating actively through practice – immersing them in the content through role playing with professional actors, case studies, storytelling, group discussions, brainstorming, debriefs, and debates.

This technique can make the difference between delivering a traditional training workshop (that is forgotten within two weeks), and facilitating an experience that changes behavior for the long term. While the relationship between practice and behavior seems conventional and obvious, it is only a small part of the experience. Continuing to practice after the event has ended is what sustains behavior.

After two weeks,  
we tend to remember:

20% of  
what we  
HEAR

50% of what  
we HEAR &  
SEE

90% of what we  
SAY & DO

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## BEST PRACTICE 5: Sustain

Most of what we learn in a workshop is lost a few weeks following, if it isn't sustained. Noise of the everyday and the pressures of life revert us back to what is familiar and what we knew from before. Ongoing coaching and in-the-moment reward and recognition are critical to drive behavior change that leads to consistent delivery of your customer experience vision. For this reason, sustainment tactics through a myPractice solution were leveraged to drive the highest return on investment.

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One participant said:

**“This course has completely turned me around; my attitude, and how I talk to customers. I have been in this position for 5 years and this has changed me – I finally get it.”**

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### Sustainment Through Practice

Follow-up phone training and one-to-one role playing was used to get back in touch with participants following the workshop. This gave them an opportunity to actively apply what they recently learned and provided pointers on how they could improve. We designed a custom practice simulation with embedded cues, clues, and objections based on skills learned in the workshop. Each simulation was personality-driven, including improv actors who brought to life customer back-stories and key personality traits – because we know different personalities trigger different responses in each of us.

These actors were also highly qualified coaches. And throughout the simulation, they did all the things real people do. They got angry, they got quiet and didn't tell you what they were really thinking, or they talked too much, and sometimes they even cried. They replicated the interaction in a way that was so believable, the actors often had people hang up on them because they forgot it was a simulation. That meant our coaches didn't just role play – they were able to helicopter above the action and take detailed notes to use in the coaching session.

Once the practice simulation ended, actors came out of character to coach. The power in this is that the employee received immediate targeted feedback on the conversation that had just taken place. The actor/coach gave feedback from the customer perspective – based on what it “felt like” to be in that interaction. That is what gave participants their huge “ah-ha!” moments, and fulfilled the original design objective: What do we want customers to “feel.”

## Best Practice 6: Focus on Coaching

Underpinning the entire spectrum of customer experience and immersive hospitality is the need for coaching. The importance we place on coaching is grounded in **research showing if training fails, lack of coaching is the cause 90% of the time**. Effective coaching is a key enabler to bringing many of the other practices to life, including effective practice, sustainment, and in-the-moment reward and recognition.

There are five different types of coaches that support employees in different ways and maximize investment in a program. In fact, we think the combination of all five coaches drives significantly better results than executing on one or two alone.

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**“The myPractice session was absolutely great! You get to test your skills and it points out the things to do better and improves relationships. People want to be made to feel cared for and listened to.”**

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And that's why we call this our Coaching Network:

COACH	ROLE
Change Agent "The Butler"	Bring different perspectives and generate new ways of thinking (ah-ha! moments)
Industry SME "The Expert"	Partner with the change agent to make sure the program delivers relevant and industry-specific context to the ideal of hospitality
Professional Performance Coach "The Practice"	Recreate typical customer interactions and deliver targeted feedback in the moment
Manager "The Support"	Reinforce the customer-centric behaviors through informal rewards and rituals (huddles, bright spots)
Peer "The Mentor"	Share wins and challenges to jointly arrive at solutions and get better together

Engaging employees to create powerful and compelling customer experiences will differentiate your brand from the competition, and create more personal experiences between your brand and your customers.

## The Power to Create Rich Brand Experiences

A poorly engaged workplace is deeply damaging to a brand. The mentality, passion, and care each employee takes in his or her approach to work echoes out and affects the brand as a whole – for both customers and employees. Yet brands can combat the apathy that is destroying positive customer sentiment by aligning their people with their brands' promises, and giving them the tools and empowerment to bring the brands' customer experience visions to life. The right customer experience can transform the way it's seen in the marketplace. This is an opportunity to differentiate and bring customers closer to the brand.

### THREE KEY TAKEAWAYS

1. Don't think about your employee event in isolation
  - Focus up front by starting with your customer
  - Sustain at the end with practice and coaching
2. Use it as an opportunity to break the mold and change the mindset
  - We did that with Charles the Butler and by immersing participants in a different environment. There are many other ways to achieve this, but thinking outside the box is critical. If you can't think outside the box, your people won't either
3. Practice and coach to sustain behaviors
  - Don't think about your program as a one-time event. It's ongoing. It lives forever. It should be reinforced on a daily basis through coaching and support from managers and peers



## ABOUT THE AUTHORS

### **Kelly Taggart**

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Kelly is responsible for designing and implementing strategic solutions that bring an organization's customer experience vision to life through its people. She is an award-winning strategist with deep experience across a variety of industry sectors, including automotive, tech telco, financial services, healthcare, retail, hospitality, and consumer goods.

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### **Catherine Hayos**

*Director of Learning, myPractice*

Catherine is responsible for designing custom learning solutions that drive specific skills and behavior changes in an organization. Her focus is on ensuring that learners experience 'real life' simulations coupled with targeted coaching and feedback.



## Download the Webinar

Kelly Taggart, Director of Customer Experience at Bond Brand Loyalty, Charles MacPherson of Charles MacPherson Associates Inc. and Catherine Hayos, Director of Learning, discuss six best practices to designing, implementing, and sustaining your customer experience vision. [CLICK HERE](#) to download.

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## ABOUT BOND BRAND LOYALTY

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Maritz Canada and Maritz Loyalty Marketing recently joined forces and rebranded as Bond Brand Loyalty. As a leading North American Brand Loyalty Agency, we have been practicing brand loyalty for over 100 years for the world's most influential and valuable brands. We make the world a more loyal place – a world more rewarding for customers, richer and more resilient for brands, and extremely profitable for the businesses those brands represent. We build measurable, authentic and long-lasting relationships between our clients' brands and their customers through a combination of services, including loyalty strategy, customer experience, market research, insights and analytics, live events, experiential marketing, and proprietary loyalty technology platforms. Bond Brand Loyalty is a Maritz Company.



Contact us or learn more

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## ABOUT MYPRACTICE

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myPractice has been delivering innovative learning solutions for over 10 years focused on changing behaviors through deliberate practice. We make learning stick. We provide people with the opportunity to practice their skills in a safe, non-threatening environment, and receive coaching and feedback on how they are delivering on the customer experience. Ultimately, we drive how an organization delivers on its brand promise.



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