Making a Splash with ICE!
Build Your Business with the Incredible Customer Experience

Presented By:
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Sources

Bridges, William "Managing Transitions: Making the Most of Change", copyright © 3rd Edition, 2009 DaCapo Press Books

"Creating Excellence – Managing Corporate Culture, Strategy, and Change in the New Age", Craig R. Hickman & Michael A. Silva, NAL, January 1985

Godin, Seth, "Tribes", Copyright © 2008, Penguin Group

Robert P. Vecchio, "Organizational Behavior", Dryden Press. 1988

"Understanding your target market"   www.allbusiness.com; 2002

Session Objectives – Upon completion of the course, the participant will be able to:

❖ Analyze the elements of dealing with change and establish new ways to connect effectively with buyers and sellers.

❖ Implement technology as a strategic initiative in order to create and maintain effective connections with buyers, sellers, agents and vendors.

❖ Define which "best practices and tools" are most effective in improving service to buyers and sellers such as understand "Moments of Truth" and creating great moments of magic in the relationship and service delivery.

❖ List multiple process steps that can be taken to generate an incredible client experience that creates interactive, supportive and consumer centric relationships.

❖ Apply techniques in communication and strategy sessions done in conjunction with buyers and sellers in order to establish essential methods for communication and completing tasks that are important to the client and/or customer.

❖ Work closely with the buyer and seller clients in problem solving and initiating actions that best meet the clients expected outcomes.

Getting Grounded on Current Conditions

❖ Buyers and Sellers spend time and money on things that matter and on things they believe in

❖ Too many licensees care about numbers, not advocates. What is missing is the depth of commitment and interconnection that true engagement and consumer centric thinking delivers.

❖ When implementing change, often people toss out everything that was done in the past and the good processes disappear as well.

❖ It is critical to define your purpose as to how you can best serve the buyer and/or seller

  o Be the best provider of real estate services possible

  o Establish a reputation for being edgy and cool

  o Procure enough experience that builds your competency to a high level

  o Decide whether your service is based on a quality value add basis for the consumer

❖ Fundamental elements of consumer engagement has shifted

  o Licensees must keep all essential persons informed of activities and supports the objectives of the client

  o Licensees are a catalyst, but when they succeed, it is due to a joint effort with the client

What Prevents Excellence

❖ Short term orientation to problem solving and incorporating change

❖ Quick-fix mentality - not understanding how wrong decisions harm the consumer

❖ Becoming immobilized by fear as they struggle to decide upon a course of action to take

❖ Tendency to become engulfed in a sea of mediocrity when they discover mediocrity is rewarded

❖ Lacking the personal strength to stand out by committing to a course of action - being All In.

Rewrite the rules; don't just create more exceptions to them.
**Jeffrey Hollander, Seventh Generation**

Innovation is often the result of random conversations – collisions – where ideas outside your industry are applied to your own. We want to accelerate those collisions among people.
Tony Hsieh, Zappos

The Truth Hurts…

❖ The true experts on your products and services are your customers/client

❖ A licensee's ultimate goal is to assemble a dedicated team that is committed to the Incredible Customer Experience vision.

❖ Licensees and their dedicated team need to be brave enough to recognize when changes in the environment are significant and acknowledge incremental adjustments are inadequate. Often they will understand and support that radical changes are necessary in order to achieve the vision of an exceptional customer service experience.
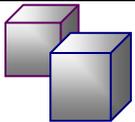
Group Discussion

Identify the service expectations you believe your buyers or sellers want and deserve as it relates to the experience they get from your company.

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_____
_____
_____

Discuss the top ways you determine how you decide what type of service to price to your client. Is it different for the face to face experience vs online?

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❖ Six marketplace realities that didn't exist 25 years ago:

- *Time* – buyers, sellers and agents have endless to do lists, so hard and fast approaches to customer engagement to stay relevant is necessary

- *Value expectations* – Buyers and Sellers are used to getting what they want when they want it and how they want it

- *Market structure* – licensees are merging teams in order to address the more narrowly focused specialized services that the public demands

- *Generational differences* - delivery of products and services need to take multiple formats in order to accommodate generational preferences

- *Competition* – online and mobile media is a recognized threat to the brick and mortar business.

- *Technology* - delivery of services must incorporate technology in order to remain relevant to all levels of customers/clients. There is no excuse to being disconnected in today's marketplace.

❖ Engagement of buyers and sellers is the business trend that won't dissipate anytime soon.
❖
- o Licensees tend to rank themselves very high in terms of being accountable for their mistakes while buyers and sellers see the opposite

- o Licensees may not admit to making a mistake as they didn't want to look weak or incompetent

- o Erosion of trust in licensees comes from:
  - Being inconsistent
  - Lying/lacking transparency
  - Lacking business management skills - Not holding others accountable for delivery
  - Passing blame
  - Talking behind the client's backs
  - Not "walking the talk"
  - Not listening to the buyer and seller as they describe their wants and needs

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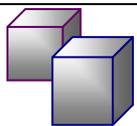
Group Discussion

What are the main reasons why a buyer or seller may not trust you or your company?

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What are the main steps you can do to build trust within your community?

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It Begins with a Strong Foundation

- ❖ Act with integrity
- ❖ Listen and demonstrate daily that you care
- ❖ Encourage and support empowerment of the client and team members
- ❖ Recognize the hard work of others
- ❖ Provide clear, consistent and constructive feedback and directions
- ❖ Merge client goals with your vision and setting of performance standards
- ❖ Help clients and team members learn by experiencing the consequences of their own actions
- ❖ Correct problems right away, don't procrastinate
- ❖ Accurately identify the risks or pitfalls as you select best option before implementation
- ❖ Address apathy issues within the client by enhancing individual ownership in the outcomes
- ❖ Evaluate and leverage your assets
    - o What assistance do you need and who is qualified to help?
    - o Who do you trust and why?
    - o Do you create a harbor of safety to discuss problems with your team and clients?
- ❖ Fight the right battles, regardless of the pressure to turn your attention elsewhere
- ❖ Avoid analysis paralysis
- ❖ Communicate your success
- ❖ Build tolerance for other points of view - a thick skin against peer pressure

Characteristics of ICE: Incredible Client Experience

The fundamental culture attitude is to exceed the wants and/or needs of a customer and client on every level and each member of the organization must demonstrate the following:

- ❖ Reliability and consistency in the delivery of their service to the client
- ❖ Accountability for their decisions and actions
- ❖ Assurance and empathy for the client and their situation
- ❖ Responsiveness to the client's needs that is prompt and effective
- ❖ Tangibles (such as costs of operations and to time management) are understood
- ❖ Constant upgrading of individual performance through the use of best practices discussions with other team members, books and tools that give new suggestions in order to improve the customer and client experience.
- ❖ Recognize and capitalize on the true "Moments of Truth" that exist within the relationship and transaction. The goal should be to create great moments of magic.
- ❖ Think strategically like the client/customer in establishing how to perform service related tasks.
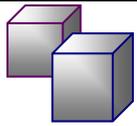
Identify 5 things that would qualify as a moment of truth when working with a customer you have never met.

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_____

Identify 5 things that would qualify as a moment of truth when working with an existing client.

_____

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The ICE Strategy Process

Buyer and sellers have great difficulty differentiating between the companies and licensees who provide the same basic services or products. Where the fundamental difference begins to become evident is when a client witnesses the actions of a tightly knit team of competent sales associates who can't wait to deliver a service level that is truly outstanding. The lofty goal of ICE - Incredible Client Experience is obtainable when you follow four essential steps that continually move you and your team towards the service delivery your customers and clients deserve.

Step 1:   Gather Information

Nothing can be accomplished until you know exactly where you stand in terms of service to your buyers and sellers. Intuitively knowing where you stand and actually having supportable data to prove your service levels are two different things.

❖ Start with an internal survey managed by an outside source to ensure that honest feedback and opinions are shared.

- Ask questions that target the general feelings of your team regarding the following:
    - o internal quality processes
    - o management involvement
    - o training
    - o problem solving and risk management
    - o performance evaluation processes
    - o overall satisfaction of the team member
    - o Recommendations for improvement that will assist the organization in meeting the new service delivery standards.

- Gather suggestions directly from your peers that could be the basis for improvement in all areas listed above.
    - Compile the responses for future reference in the decision making process.
- ❖ Review the survey and begin to identify those areas that need work. Facilitation of and team members ("insight" group) must be neutral, not defensive, and seeks to ensure that the true issues come to light no matter how uncomfortable the information might be. It is extremely difficult to initiate a culture change without real data. Treating this feedback with respect; honoring the truthful input will increase credibility and ultimately set the stage for a successful transition.
    - Implement information gathering strategies such as surveys - all specifically designed to identify those areas most important to the buyers and seller customers and clients as they choose the organization they align themselves with.
        - Consider offering an incentive, such as drawing, where individuals who complete the survey are automatically entered. The goal is to get as high of a response level as possible.
        - The point of the survey is to uncover what the customer/client feels is MOST important when making the decision to utilize the services of an organization like yours. The answers they provide will provide a roadmap of priorities and assist you in focusing your endeavors to design an incredible customer experience.
        - Gather direct feedback from your existing clients through phone calls or face to face meetings with the intention of identifying what you do well and areas you need to improve:
            - What do they like most about your organization? Identifying specific individuals is encouraged - they may be doing something you will want to duplicate.
            - Why do they keep utilizing your services?
            - What would cause them to seek other options?
            - What are the top three services we offer that you take advantage of the most? List those offerings for easy selection by the consumer
        - Set up a focus group of clients by offering a luncheon and then facilitate an honest feedback conversation about the business in general and their expectations. This accomplishes two things: you gain first hand opinions with the opportunity to probe for more complete answers as well as put your clients on notice that you are on a mission to excel in your service delivery.
    - Observe and track performance. You could do this by:
        - Job shadowing position within the office, or gain an in-depth understanding of the lending or inspection process. The more you connect with your staff and vendors, more conversation and opinions will surface that will give you greater insight into the type of service your customer and clients expect and deserve.

- o Set up a secret shopper. Laurie Guest, CSP has found great success in working with organizations and actually shopping her client's businesses and service experience online, by phone and face to face with a highly informed team and reporting back about her customer service experience. The information she and her team will reveal is extremely valuable, eye opening and constructive. You can reach her at laurie@solutionsarebrewing.com.

Step 2:   Assemble, Analyze and Adapt

All of the information you gather needs to be sifted through and the genuinely actionable items brought to the surface. Once you have everything on the table, you can then begin the prioritization process.

❖ Set up a plan of action to tackle the feedback. Will you do the changes needed or delegate it to your team members? Take the raw data - consider dividing it into categories such as:

- Best customer experiences
- Worst customer experiences
- What customers/clients most appreciate
- Areas of improvement that will increase trust and engagement with the customer/client. Have as many categories as you want as long as they reflect back to your original purpose - to create an impactful, exceptional experience internally and externally.

❖ Once you have workable data, develop your own ranking system of priorities.

- What steps need to take place first?
    - o Personal and/or team training
    - o Customer experience realignment
    - o Community connection

- Define the material and financial resources that will be needed:

    - o How will you inform clients and customers of the results?

    - o What timeline will be put in place for each service delivery item identified?

    - o Do you begin on the internal process first then move to the customer experience or do both simultaneously?

    - o What overall costs are associated with making the necessary changes within the organization?

- Evaluate positions, accountabilities and success planning for all levels of team members to ensure the right people are in the right jobs and have a potential to thrive.

    - o Update your personal job description as well as that of your team members and include service delivery expectations

    - o Update your task evaluation process so that behaviors that reflect the new customer experience are rewarded.

- Redefine the priorities and accountabilities of you and your client so everyone is aligned to the new culture. Make sure your company is in sync with your vision and recognizes how important they each are in the overall customer experience.

- Establish the authority level to solve problems for each position.
  - It has always been my belief that the customer should not be handed off from one team to another. A well-disciplined and supportive team member needs to know that the lead sales associate has their back and has trained them for contingency action.

Step 3   Prioritize and Implement

Once you have a clear idea of what it takes to fully engage with your customers and clients, you must prioritize your action steps and implement those actions in logical and impactful way.

❖ Identify those actions that will have the most impact on the customer experience with the least amount of effort. I use Pareto's 80/20 rule. 20% of what you implement will have an 80% impact on your results. What will truly make a difference in the consumer's attitude towards your business in terms of the impact it has on their experience? Could it be as simple as:

- Knowing their name when they come into the office and making them feel completely at home in your place of business?

- Having a highly professional lobby area that is not only comfortable, but allows for the use of technology or other forms of distraction if there is going to be a wait time involved?

- Company employees who are empowered to resolve a problem and reduce the amount of "passing" the buyers or sellers along to another department or desk.

- Answer the phone with a simple, to the point statement rather than a rambling, hard sell marketing message.
  - For example, instead of saying "Hello! Thank you so much for calling ABC Realty. We are the number one provider of real estate services and we are delighted you decided to contact us today. We care about you and the service we provide. My name is Stephanie Whatshername and I'm happy to be of assistance to you. Who is calling and how may I direct your call?"

    Make your answer short and to the point, while still maintaining a pleasant, helpful demeanor - "Hello! You have reached ABC Realty and my name is Stephanie Whatshername. How may I be of service to you?"

- Make it a point to check out the lobby area and ensure that your customers/clients are being taken care of in an efficient manner. If they have to wait, let them know how long the wait will be and make their wait comfortable by having a beverage station available to them. Check back with the waiting individuals frequently. If there is a delay that is going to be longer than 10 minutes, make sure the customer knows this and is offered the choice of returning at a later, scheduled time or continue to wait.

- Never let a customer/client leave angry or upset if you can possibly prevent it. Do everything in your power to resolve the problem professionally and effectively. If it is an in-house system (process or employee) issue that created the glitch in the first place, move the resolution of the identified problem to the top of your operating list.

- Make it a point to develop a communication style that is best received by your customer or client.

    - In returning a response, will you call them, arrange a face to face meeting, text them or email the person with the answer?

    - When the client says "call me as soon as possible" have you clarified what "as soon as possible" means to the client? They could think ASAP means within the next 30 minutes and you may think "as soon as I get the answer" which could be in the next four hours." By not bench marking and clarifying what the customer/client is thinking, you could inadvertently become the licensee who never calls them back on a timely basis. This slight misunderstanding of a term can create a chasm in your service delivery attempt.

❖ Utilize the concept of mind mapping or systematic problem solving methods to take the more complex issues and work them into manageable action steps. Whether you use a simple blank sheet of paper or online systems such as: http://www.mindmeister.com or http://www.strategizer.com, the concept is relatively simple:

- Brainstorm and identify the problems and then list the reasons that contribute to the problem.

    - Take the most likely reason and place that in the center of the chart. Then list those activities or people that specifically contribute to the creation of the problem.

    - Once you have identified the top six or seven "causes", use the 80/20 rule by narrowing it down to the one or two causes that are most instrumental in creating the problem. If you work on that particular cause, it will have a significant impact on the results you wish to see.
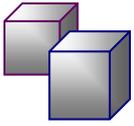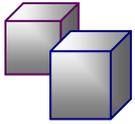
Group Exercise - Step 1: Identifying Causes for a Problem

As a group we will determine the problem to put in the center of the chart. We will then identify what is specifically contributing to the creation of the problem. Once we have six or seven "causes", we will prioritize them using the 80/20 rule "if I work on this cause, it will have a significant impact on the results I wish to see". Using the analysis cloud chart format for this exercise.

The Problem:
Seller's home
has been on
the market for
120 days with
no offers
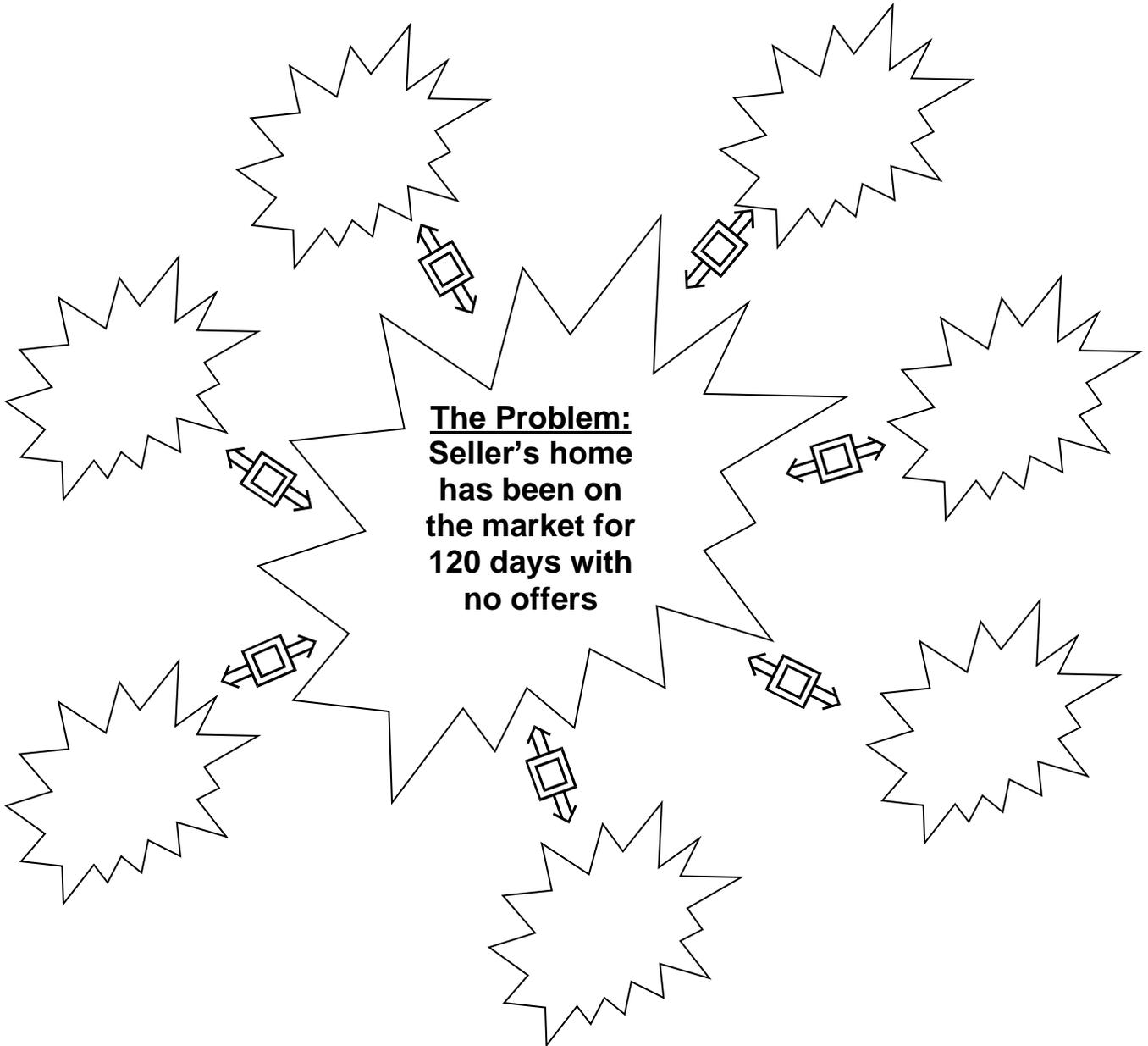
- Address the primary cause

    o This next step is for identifying the actions or tasks you can do to help address and/or resolve the cause.

    o Once again, brainstorm and identify those six or seven "actions" you can take to resolve the problem. Prioritize these actions using the 80/20 rule once again - "if you implement this action, it will have a significant impact on the results you wish to see in addressing the original problem".

Group Exercise - Step 2: Addressing the Primary Cause

Step 2 is identifying the actions or tasks you can do to help address and/or resolve the cause. Once again, we will have six or seven "actions" as a result of our discussion. We will prioritize these actions using the 80/20 rule "if I implement this action, it will have a significant impact on the results I wish to see in addressing the original problem".

The Cause:
Seller's property is overpriced

- Prioritizing the tasks needed to "fix" the cause
  - You have determined that the "primary action step" you will take and now you place it once again in the center of the paper.
    - Brain storm once again and identifying the specific tasks you need to do to in order to bring to life the action step.
    - Once again, list six or seven "tasks" as well as an assignment of responsibility and time line for each task. Using the 80/20 rule make sure that if these tasks are completed, it will have a significant impact on the results you wish to see in addressing the original problem.
  - Evaluate your decisions
    - What is the worst thing that could happen and what will you do if the worst thing happens?
    - What is the best thing that could happen and what will you do if the best thing happens?
    - What is the most likely thing that will happen and what will you do if the most likely thing happens?
    - It is an activity that will increase efficiencies in the transaction
    - It is an activity that will decrease the complexity of the transaction
    - It is an activity that doesn't require another action to happen before it can be accomplished.
    - How can you ensure that you will get your high gain activity completed?
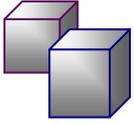
Group Exercise - Step 3: Prioritizing the Tasks for Action

Step 3 is identifying the specific tasks you need to do to in order to bring to life the action step. Once again, we will have six or seven "tasks" as well as an assignment of responsibility and time line for each task which will surface as a result of our discussion. We will prioritize these tasks using the 80/20 rule "if this tasks is completed, it will have a significant impact on the results I wish to see in addressing the original problem".

Action Step
Update the décor so it aligns to the price point
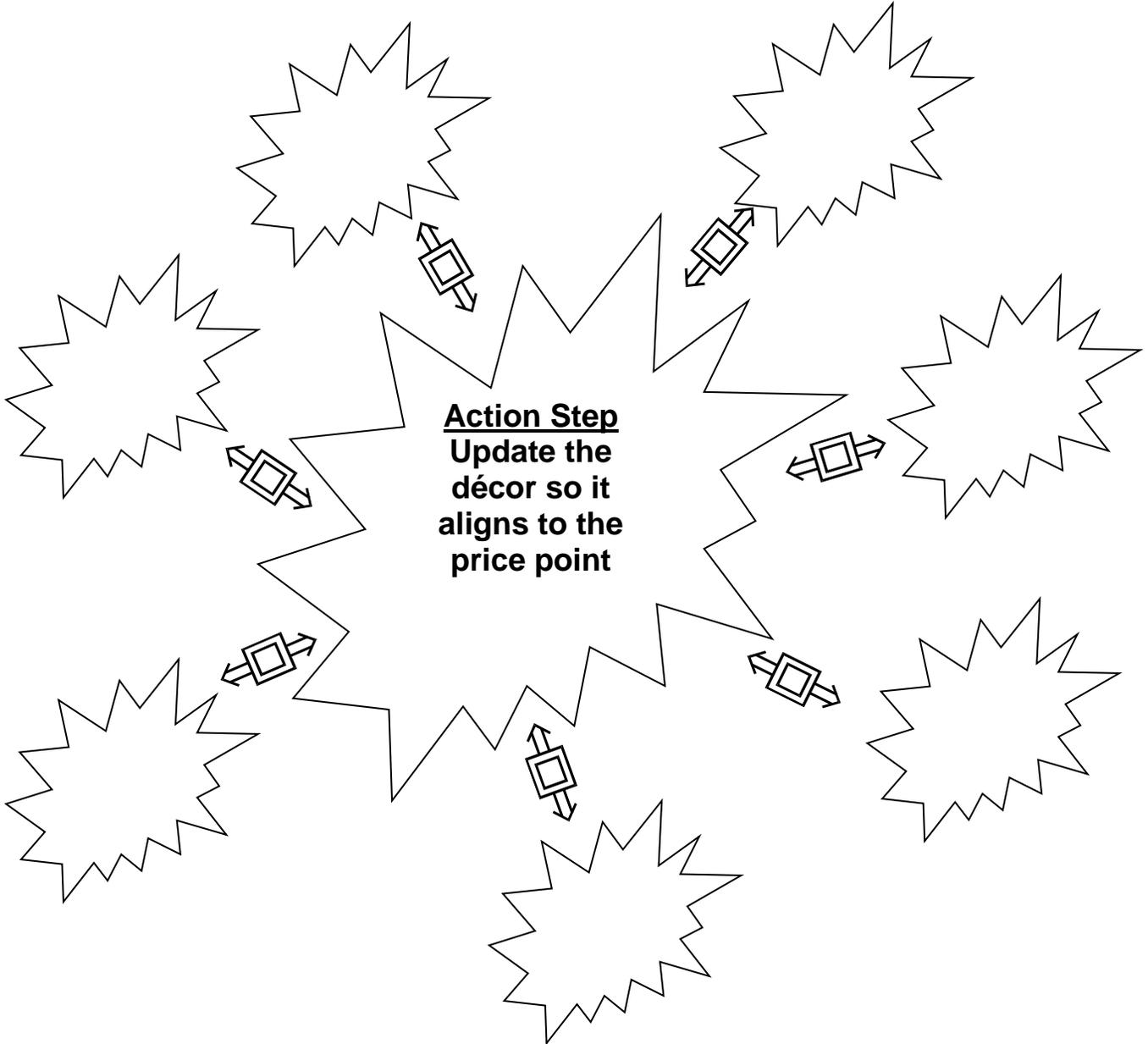
Tactics Development

"The Real Estate Agent's Business Planning Guide", Carla Cross, Dearborn Publishing, 1994

Each tactic needs to be developed properly to ensure its cost-effectiveness.

Objective or Problem   _____

_____

_____

Tactic   _____

_____

_____

Written Materials Required

_____

_____

_____

_____

Equipment Required

_____

_____

_____

_____

Professional Resources

_____

_____

_____

_____

Who Will Do Preparation Work?

_____

_____

Completion Deadline   _____   Budget _____

Notes

_____

_____

Step 4:   Evaluate Results and Calibrate Accordingly

It isn't unusual for an action step or two to go awry. Reasons for this might include: the problem solving step may have been rushed and decisions were made with incomplete information or the implementation of the action step isn't supported by everyone on staff. Multiple reasons could exist that essentially stall a well-intentioned strategy. That is why the evaluation and calibration step is so vital.

❖ Check your follow up routines and tracking systems. Know exactly where you started and the goal you hope to reach.

  • Are your steps measurable and quantifiable?

  • Is the action plan something every team member can implement with the least amount of disruption to current operations?

❖ Review the new cultural service environment and evaluate the impact upon the customer experience.

  • Do your customers and clients notice and appreciate the difference?

    o Have you set up a follow up survey that not only measures the emotional reaction to your culture change, but also did your changes have a buying decision making impact?

  • What specifically are the benefits to your customers that you hoped to achieve and are those benefits easily recognized by your target audience?

❖ Make the appropriate adjustments in staffing or processing as needed, constantly keeping the focus on the ultimate goal of designing and maintaining an exceptional customer experience culture.

The Strategy of ICE is all about input, collaboration, setting aside egos and making every action consumer centric. Concern about the customer or client always trumps concerns about the money. You know personally, when you are in the hands of an organization that puts you first and foremost. It feels wonderful, safe and makes our decision making process extremely easy.

Every retail and service based business makes choices every day regarding their approach to the customer or client. What management chooses to recognize; the number of transactions or the quality of the transaction, is paramount in setting the stage for that incredible customer experience.

From Decision to Action

If you are in a leadership role, ask yourself how you can implement the Strategy of ICE your direct reports or team.

❖ How can you support your staff as they work to become the best they can be at their jobs?

❖ Are your rewards for exceptional service customized to fit the needs of the individual team member?

❖ Do you walk the talk every minute of every day? Leading by example is the single most powerful culture changing strategy you can implement.