by Cristina DRĂGAN

# NORMALIZE Great Service

## THE 5-WEEK PLAN

A detailed, practical guide, inspired by 5* hospitality best practices, for entrepreneurs and small-business owners to better serve their employees and customers.

# Normalize Great Service

## -The 5-Week Plan-

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**Dear Ashley,**
**Keep connecting the dots between what people ask for… and what they didn't know they needed. That's service with intention. Here's to helping clients feel seen, supported, and just a little spoiled.**

**With enthusiasm,**
**Cristina**

**July 8, 2025**

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# The Opening Note

> ***While inspirational posters will tell you to THINK BIG, for this self-implementing guide, I am going to make it my mission to THINK SMALL, focusing on simplification, addressing specific and manageable challenges, fixating on details, and step-by-step improvements!***

## Why genuine care and attentive service do not happen naturally?

The intriguing yet paradoxical reality about exceptional service is that although based on such basic, free, and natural tools (smile, eye contact, being present, saying welcome and thank you, sincerely caring about someone who wants to do business with you) we fail consistently at using these tools.

Each time I feel unseen, rushed, dismissed, or rejected during a service interaction, I complain in my mind, sometimes yelling out in frustration: "I want to give You money, is it too much to expect from you not to have a disregarding expression on your face, even annoyed because I interrupted your process of arranging the new merchandise, after me being the (first and only) one saying hello when entering your shop?" And then I swear to never go back there, or in any of their branches, or buy their products! But then I remember, I love their products, so I may go back… and I never write online reviews or verbalize my unhappiness because I don't like creating conflicts or putting people on the spot, so… am I enabling this way of being treated? But is it me who needs to educate them?". Then I remember that it's not their fault, and this upsets me even more.

**COULD BE** that they (the service, customer-facing employees) don't know better! They have never been given clear instructions on how to behave when serving a customer, did not know there even is a certain way to behave, whoever selected them for the role did not consider their serving skills, did not clarify expectations when they started working, nor presented the customer interaction as a priority of the business! Or maybe they are demotivated and unenthusiastic because of low salaries, poor leadership, unclear directions, or lack of feedback, appreciation, and celebration.

**COULD BE** that the owners have trained them and clarified expectations, but the employees do not care and do not respect the instructions, they are not paid enough to put in that effort too, they think they are doing a good job already, and there is no need for improvement, after all, they have experience in the field! Well, I strongly believe that an owner who invests time in training his employees to create a pleasant customer experience also cares enough to verify the implementation, and the performance, read the reviews, do spot-checks, find out if the customer is happy, offer feedback and help his team member understand the importance and the benefits. In the end, the employees' behaviors and service skills represent the business, the product, the service, the reputation and all these should be associated with anything else but great service.

**COULD BE** that there is a cultural aspect of the service interactions, in some countries more than in others, a purposeful way of welcoming the customers with a smile, eye contact and hello is not considered natural or necessary. I did observe this in my own country, a conflicting mentality guiding some service-based businesses: "The customer needs our product/service, it's not us chasing the customer! If you don't like it here, no one is forcing you to stay or come back". And the sad reality is that some customers accept this as a norm, not being bothered anymore by the eye-rolling and the scolding of the service assistant in the pharmacy, because they asked a question twice, the total lack of acknowledgment when entering a clothing shop in a mall, the bored and impersonal checkout transaction when buying a book at the library, the very poor service in a restaurant and the entitlement of the server to expect and ask for 15% tips at the end.

**COULD BE** that there is no need for good service? Since business is doing well, why complicate the work of the service providers by having to pay attention to gestures and behaviors, it's not like the clients are not coming, they are enough. After all, this is not a 5*luxury hotel to politely smile to everyone. (I did not even enjoy writing this last one but, it is an example of how I feel sometimes, seeing the little to no effort invested in shaping customer service in some parts of my community).

Summarizing these, it's fair to say that the truth is always somewhere in the middle. It all starts with the initiative of a small/medium customer-facing business owner to believe in and appreciate the importance of great customer service. Everything else around this desire will flow naturally: training, reinforcement, monitoring, celebration, and growing together with the team. With the accessibility to travel, one can experience great service, in different cultures, get self-educated, then come home to their business and say "I want the same in my company, how do I do that?!". I can help you with the second part, but the first one, it's fully up to you!

## How do you know you need this guide?

- Customers complain about the service or you are struggling to attract and retain customers.
- Your employee turnover rate is high or they lack motivation and enthusiasm.
- You're facing increasing competition in the industry and you are unsure about how to stand out.
- Your business is expanding, and you want to maintain a high level of service.
- Your online reviews are very few and consistently average or below.
- Your service interactions lack personalization, human connection, and acknowledgment.
- You're looking to increase revenue and/or build a great reputation.

## How to use this guide?

This guide is about breaking down the complex service behaviors, acquired through a long exposure to a 5* luxury environment, into simple and built-in steps, and making them accessible to small and medium business owners and entrepreneurs who value their employees and customers but do not know where to start from, nor have enough resources (knowledge, people, money, time) to improve visibly. With the purpose to stop contributing to a broken ecosystem of average and poor service, leading to unhappy employees and dissatisfied customers who, having given up on their expectations, accept this as the norm.

This guide is not about successful recipes, strict standards, and rigorous audits, it's a structured form of revitalizing the common sense to create meaningful connections. That is why it could be applied in numerous types and sizes of businesses, as long as they are based on a direct employee–customer interaction.

I am still proud and grateful, looking back at how my career evolved in one of the most amazing companies in the world, in three different countries, finding myself today, with my view of the world deeply impacted by these experiences, compelled and inspired to share what I learned. I never considered working in hospitality when I started thinking of a career, even university studies were a very uneducated choice, a "going with the flow" kind of movement, specific to the little town I grew up in and the limited access to information. But someone invested their trust in me, despite the lack of knowledge or experience in service and luxury (I guess they were charmed by my personality), so I plunged, head first, into this very layered new area that I enjoyed discovering in the years after.

**My first lesson** in hospitality was that the foundation of providing luxury experiences (or any quality experiences) is taking care of the employees, and this principle hasn't changed today, on the contrary, it's becoming more and more a priority, in all industries. Working in training and human resources I could explore all the small and big processes behind this beautiful concept, making sure it does not remain just a concept in the welcome booklet company description.

> ***"If you take care of your associates (employees), they will take care of the customers, and the customers will keep coming back" by JW. "Bill" Marriott Jr., the former CEO of Marriott International.***

This guide strives to continue this principle, making sure employees are cared for in the learning process, constantly recognized and incentivized, valued for their contribution, and empowered to be their best selves. If this basis is not respected, none of the principles listed below would have a return on your investment of time and effort. Words will remain words and old behaviors will continue to be considered acceptable

**My favorite lesson** is that, for companies to thrive, all employees, regardless of the department, share one unique goal, "serving the customer". This is often misunderstood and confusingly cascaded by some leaders, having employees place all their efforts on meeting sales goals, budget forecasting accuracy, turnover, training hours, food cost reduction, standards audit goals, trapped in the support departments and working with the mentality that "I do not interact with the customers, I am processing invoices / I am recruiting employees / ***I am cooking, so how can the customer be my priority?".***

> **Well because everything employees feel, do, or think, their speed and accuracy, their personality and role, they all impact, in the end, the customer's experience.**

Let's make it clear, all departmental goals are essential to progress and performance but it's important to understand the difference between job-related goals and the company mission that I identify with and work for every day! And, since in the hierarchically structured companies the employees are a mirror of the leader, we easily go back on this line and say, as a recurrent remark that breaks under the burden of the reality, that culture starts from the top.

In 13 years in hospitality, I experienced the impact of 7 different general leaders on a team of an average of 300 employees and it's magical and scary to see how everything reflects the leadership: the hopes and dreams of employees, the fears and pressure points, the mood and the motivation, the priorities, the customer experience, the day-to-day connections.

Wow, so much power! And if the leader knows these lessons, that employees are the foundation and customer satisfaction is everyone's goal, everyone wins! Now how do we scale this down to small and medium business owners, or entrepreneurs with teams of 3 to 5 employees, with no time and resources to create a culture? Well, nothing much changes, the principles are absolutely the same. The 3 employees need to be taken care of and they will put passion in serving the customers. If anything, the closeness of a small team should make everything easier to implement, observe, and improve, but also the results of not doing so would be far more devastating, as negativity can rapidly grow in the tight knit of a small team.

Although contradictory to the focus of my career, even now I much prefer small, simple places where people engage naturally, than the luxury and the carefully crafted attention to physical and emotional details I experienced and helped create for others, for many years (also because the second environment is not something I can afford very often). But this is just another argument that authentic connections and genuine care are universal, not claimed only by the high-end and 5* industries. And when you shake down all the amenities, the impressive cooking displays, the eye-pleasing decorations, the sophisticated architecture, that the luxurious places offer, **ALL THAT REMAINS IS** the feeling you have, the emotion that connects you with the experience and these can only be created by the way the hosts take care of you.

Unfortunately, the decision to create this guide was the practical consequence of a big perspective and life change I went through when I relocated back to my country after almost 10 years abroad. The reason for moving was a positive one and it came with many emotional benefits, being so close to my family. I say unfortunately because I encountered so many service transactions below minimum expectations in the first year that…

**…I asked myself if this is what I need to adapt to or if could I do anything to try to show that there are better versions of this.**

I had to assess this correctly, because I was definitely biased at the beginning, coming from a country where the competition for high and very high-quality service was intense, for the benefit of all businesses and their beneficiaries, us, the customers. From the street market and neighborhood pharmacy to the famous 7-star hotel, someone would go the extra mile, welcome you with a smile and a hello, and try to upsell you something.

Was I still biased to expect only a hello and, if I am lucky, a smile when I enter a really expensive cosmetics shop or a world-famous bakery?

Fine, maybe it was my professional habit, seeing all service transactions through the lenses of luxury and judging too harshly, but is it though?

Oh, I know, maybe I am in general a difficult client, asking for too much, after all, it is just an exchange of money and product/service, so why do we have to complicate everything, you've got what you came here for!

If the plan is to **MAKE IT SIMPLE**, let's start with this:

- If you are a business owner, a successful entrepreneur, a service professional, or a hospitality enthusiast, think about what you need when YOU are the customer. *(And yes, we are all different and unique and our needs are diverse, but if we start with the basic and universal needs, this could already make a huge difference).*
- Do you need to be seen, acknowledged, offered attention while served, and maybe, depending on the place and the frequency of the visits, recognized and valued?
- If the answer is yes (and why wouldn't it be?) then we solved the puzzle, do the same for your employees and customers and there is no need to follow through with this guide. It's enough, everyone is happy and the business thrives.
- If you are looking to go beyond the basic needs, align with the rising trend of personalization, stand out in an abundant market, find a niche, build loyalty, or expand your business, you will find the practical steps outlined below necessary and easy to implement by yourself together with your team.

## Who is this guide for?

If you are a passionate entrepreneur and you own a customer-facing small or medium business, then this guide is for you! Prioritizing authentic customer service does not happen by default and should not be just a choice but an obvious and strategic decision.

I have seen the effects firsthand and companies have studied it to molecular level. It's enough to see some statistics or take a deep dive into the reality of your business (online review sentiments, loyal customer basis, employees' performance and turnover, the business style of putting off fires or executing plans?), to see the importance of providing excellent service.

According to 123FormBuilder 2023 Customer Service Statistics [123FormBuilder. (February 27, 2024). Blog. Retrieved from http://www.123formbuilder.com/blog/customer-service-statistics ]:

> 90% of customers are willing to spend more when companies provide personalized customer services.
> 70% of the buying experience is based on how the customer is treated.
> 61% of customers would leave for a competitor after just one negative experience.
> 64% of businesses say they can notice sales growth due to good customer service.
> 81% of people claim that receiving good customer service makes them more likely to make another purchase.
> 73% of business leaders report a direct link between a company's success and customer satisfaction

This guide wants to be versatile and beneficial for a long list of businesses across multiple sectors. It is, however, particularly well-suited for small and medium companies in service-based, customer-facing industries. Here are below some examples:

HORECA (HOtel-REstaurant-CAfé Industry)

- Small hotels, pensions, boutiques, retreats seeking service improvement and those in the pre-opening, opening, and conversion phases;
- Restaurants, bakeries, and coffee shop owners can brilliantly apply and self-implement this guide to enhance service quality;

- Travel and tourism, including tour operators and private transportation companies.
- Catering and event coordination businesses can benefit significantly from its principles, ensuring they deliver according to the needs of the customers.
- Outsourcing companies specialized in hospitality placement can use the guide to enhance training and performance of their staff making them more valuable on the market.

OTHER SECTORS:
- Fitness and wellness (fitness centers, wellness facilities, spas, all types of salons: beauty, nails, hair, cosmetic, etc.);
- Healthcare (private medical clinics, dental clinics, and pharmacies);
- Retail (from clothing and gift shops to electronics stores, including luxury brands) can also integrate these simple steps to personalize the service;
- Entertainment providers like museums, art galleries, waterparks, and playgrounds can enhance their visitors' experiences by implementing new behaviors;
- Private schools, nurseries, and kids' workshop organizers can enhance parents' and children's experiences by customizing their approach;
- Professional service providers, such as solopreneurs, consultants, freelancers, and independent experts, interacting directly and personally with their customers, can find value in incorporating the guide's principles to improve the authenticity of their relationships.

## It will successfully work if…

You are committed to being a role model and the strongest advocate of all outlined principles.

You select only what is relevant for your unique business, as not all the concepts below apply to yours! (thus, reducing the amount of information you have to handle).

You not only ask the employees to change their mentality and acquire new standards but you start by changing the context for them to succeed (make sure they are cared for, appreciated, happy and engaged before launching any new initiative).

You expect ALL employees (not only the customer-facing professionals) to adhere to the guidelines - you cannot return to your office and get back to old behaviors and responsibilities because you "have more important things to do than smile!".

You plan to reinforce, verify, or audit the standards, consistently, without hunting for mistakes and extending employees' working time.

You plan to celebrate success stories and recognize amazing service behaviors, EACH DAY, EVERYDAY!

If not respecting the above prerequisites, you can still read this guide, out of curiosity and personal interest, but, without action, it will not improve your business and the relationship with your employees and customers!

# How much money is this change going to cost me?

This is not the best question to ask, it already blocks the positive vibe of the change you are considering doing, as it focuses on "how much am I going to lose?"! A more suitable one would be **"How much money is this change going to bring me?"**, or, a fair and business-related question of "How do I quantify the return, what is my return on investment?". I am happy with the fact that you are not satisfied with the empty promise "benefits outweigh the costs, you will see!", we will approach this later: how to plan so you can measure. Until then, for the implementation of the new service behaviors, let's list potential sources of cost:

- The purchase of this guide is your first investment, thank you for the trust, by the way!

- Then, if you have a larger business, you may need to allocate some money to employ the services of a consultancy company to get you started on your business analysis – online reviews, local and extended reputation, mystery shopper audits, employee engagement survey and analytics, revenue trends, inventory, and suppliers. If your business is small and you practice keeping track of all these metrics regularly, then you can have this step done by yourself with the minimum guidance I provided below, so it's only an investment of time and interest.

- You will see in the plan for self-implementation that I suggest a Kick-off Meeting or Event to announce the upcoming changes and to set the tone of the new context you are creating. This could represent a cost if you would need to rent a training space, order treats and gift bags for your team members, or even close your business for one day. Or you can ask an event organizing company to make it memorable for your employees based on your indications. The budget depends on each type and size of the company, and the extent of impression you want to achieve.

The rest of the actions do not cost money, they, however, require short but regular contributions of time, consistency, and genuine care for your employees and customers. Why do I have the feeling that while reading you will find this last element still the most expensive and difficult one…?

# Serving the Employees

***Before we ask our employees to (better) serve the customers, we need to learn how to serve our employees first.***

I was so privileged to experience, in my career, a work environment where the priority was taking care of the employees, it was one of the most significant values of the company. For example, in my last role, to add to the challenging aspect of living by this value, daily, I was part of a team, with an average of **400 employees** from **60 different countries** with maybe **200 different subcultures**, customs, and religions. All the cliché phrases, motivational stickers, success stories, and impressive turns of events were a reality, a daily practice, in my line of work.

The employees were my customers, they were the most important resource of the business; we were there to know, protect, value, develop, celebrate, and help them and their families thrive! Even today, although I no longer work for the company, I strongly feel like I belong, it resonates with all my beliefs, despite going through hardships and dramas universally common to all large and corporatized working places.

This extended exposure had a downside, the fishbowl effect or the happy bubble effect, call it as you may, the feeling that this practice (taking care of the employees) is happening in all companies, small or large, because, after all, it's the most obvious thing, if your employees are happy, they work better, clients are delighted, you make more money and the cycle re-starts, sounds like a Business Management class 1on1.

But we all know or heard of employees' experiences that have nothing to do with the value presented above.

> ***And to ask for engagement, enthusiasm, positivity, and passion for the customers when the basis for a respectful employer-employee relationship is precarious or nonexistent, it's a lose-lose negotiation.***

Some of the below types of damaging environments are still normal in today's world, even more so within small and medium businesses, that lack knowledge, time, and human resources to focus on culture. The hopes are getting higher though, with the accent placed globally on creating a better culture of employees' experiences, designing new and effective tools to help business owners train, support, promote, and celebrate their employees, the freedom of expression, and voicing the concerns.

After 2020 the trend of Employee Experience started to go up and become important across all sizes and types of industries, as the hard lessons learned through the pandemic have, forever, changed the work environment structures, shaken the values, and changed the priorities. Here are some recurring and still persisting issues in the workplace:

**Toxic work cultures.** Knowing that in your company, the bullying, harassment, or discrimination, disguised in various forms of micro-behaviors and passive-aggressive messages and tones, go unchecked due to lack of interest, accountability, or know-how, would impact your mental health, job satisfaction and create context for feeling scared, unsupported and undervalued.

**Lack of transparency and communication.** Being taken by surprise by big changes or decisions can impact you directly. In a workplace where information is not presented and cascaded transparently and clearly, you can feel insecure, frustrated, disoriented, and confused about the goals and expectations.

To add to this, the lack of constructive feedback sharing and the openness for dialogue can make you feel hesitant to voice your concerns, keeping you stuck in the same quiet quitting state, with no interest in innovation, progress, or self-improvement.

**Prioritizing profit**, **productivity, and results over the employees' well-being** and dare I say, even safety. Some small and medium companies do have a focus on cost-cutting, unhealthy competition, and unreasonable targets that create high levels of performance pressure on employees. To the extent of neglecting safety measures that could lead to burnout, mental and physical health issues, accidents and injuries, and continuous risk exposure.

Even these can be dissimulated under apparently positive forms of "culture" were working extra hours, never saying NO to new tasks, volunteering to work from home on the days off would make you "Employee of the month", or, my "favorite" form of fake encouragement, "punishing the performer", where, if your colleague works slower, and you are fast and precise when your shift/work day is over, you can finish some of your slow-working colleague tasks as well, for the sake of the team and the success of the company, "this is what makes you a good team player!" In these conditions, it's needless to say, that you would feel scared and anxious to go to work every day.

**Lack of recognition** and appreciation for individual achievements is a very common issue in the majority of small and medium companies. The first reason is the lack of time and resources to invest in this process, or the unfair reason "There must be something big to celebrate, we cannot have an appreciation party each time someone does their job!"

Adding to this the limited number of opportunities for promotions or career growth is strictly connected with the size of the business but it is also a consequence of the lack of interest in skills improvement, career paths, or cross-training planning for the individuals. Not being recognized for the extra effort, daily contributions, and achieving important milestones, would make you feel demotivated, apathetic, uninterested in doing more, and unhappy with your job.

**Cultural (in)sensitivity.** If there are limited resources to address obvious issues like the ones above, it's rarely expected from a small or medium company to implement diversity and inclusion programs or train their employees on cultural diversity. In my country, for example, in the past years, there has been a high influx of foreign workers.

? Were the businesses prepared to accommodate the different cultures, behaviors, languages, religions, and customs of the new colleagues, or did they base this change only on the new joiners' ability to adapt, learn, work, and perform?

? Have they considered and discussed with the team the barriers and misunderstandings that could appear, within the team, due to different communication styles, language proficiency levels, cultural norms, different expectations regarding punctuality and work ethics, cultural shock management, and even more, how could all these impact the customer experience?

? Or was this a "let's work and see how it goes" type of preparation?

The risks of taking cultural sensitivity lightly, in a company, small or medium in our case, could be damaging to the health of the entire team, creating the ground for unintentional biases, stereotypes, or microaggressions, leading to feelings of isolation, difficulty to adapt, depression and lack of performance for the foreign employees.

The opposite of this could be so beautiful, I experienced it in the most profound ways, and it takes so little to change from being ignorant of one's struggles in a new, completely different, country to celebrating and valuing the differences, and learning from one another.

Creating a place of open communication and cultural expression, educating the employees about diverse cultural perspectives, recognizing their holidays, offering language support, and asking them to offer feedback on how the integration is going, are just a few examples of limited resources actions a business owner can take to foster an inclusive atmosphere.

### DECISION TIME!

**To help you decide if the next chapter deserves your attention or if you should skip directly to Serving the Customer part, I invite you to go to The Tools section of this guide, take the Employee Experience Self Audit, and plan the next step from there.**

# EMPLOYEE EXPERIENCE SELF-AUDIT

> ***No service improvement or company change will succeed without an engaged and cared-for base of employees.***

# Employee Experience

It is very common for small and medium companies or startups, to focus mainly on the legal aspects of the human resources field, due to the same reason - limited resources and know-how. And yes, this is the logical step, having a well-defined legal frame, and respecting the rights of both employees and the company. And, can we ask for more than this when it comes to a small business of 3 to 5 team members? Yes, even if you hire one other employee, **THE SAME BASIC NEEDS SURFACE**:

- job safety
- understanding the role
- knowing the expectations
- improving skills
- being appreciated
- receiving feedback
- having a career objective

And all these translate into the basic human resources process: law compliance, recruiting and selecting, onboarding, training, performance review and feedback, appreciation and engagement, milestones celebration, etc.

For sure there is no need for complicated systems like in a corporation, discussions come more naturally, and relationship building is more direct, but without a clear plan of action, even one employee can become demotivated, and for this to happen, in a team of two, the consequences can drastically impact the business.

To take a step further, **creating and promoting a company culture**, adding personalization, a detailed attention to the employees' needs and wishes, a genuine care for their well-being materialized in clear initiatives, empowerment, and employee decision-making, means transitioning to the concept of Employee Experience. And since work culture and employee experience are deeply interconnected, I must reinforce the fact that both are very open to customization, as long as the main driver, in our case the business owner, the decision maker, is well educated or self-driven towards learning or just wants to apply a different perspective to his business and lets the experts (consultants) define the framework for him.

I built my career in a company culture that has, among other amazing values, one that I strongly resonate with - **“ *putting people first* ”** – Marriott International. The “Welcome to Marriott family” approach has consistently delivered on its promise to attract, develop, and retain extraordinary service professionals who would create memorable experiences for the guests. And besides me being a witness and experience creator as well, the countless achievements of the company are irrefutable proof.

The family-like culture thrives on supporting each other, shared values, loyalty, celebration of achievements and milestones, promoting learning and growth, open communication, and inclusive practices. This all worked for me, most of the time I felt valued, empowered, appreciated, challenged, recognized, and supported.

But at one point, as I evolved (and created my own family at home), and the working environment has forever been changed by the 2020 pandemic (bringing in new concepts, a different understanding of flexibility, hybrid and remote work, prioritizing physical and emotional wellbeing, new jobs and structures) I began to crave a different type of culture.

Ruminating on the same concept of work environment and values, I found the **Netflix** approach to culture, very interesting:

*"We model ourselves on being a professional sports team, not a family. A family is about unconditional love. A dream team is about pushing yourself to be the best possible teammate, caring intensely about your team, and knowing that you may not be on the team forever. Dream teams are about performance, not seniority or tenure. It is up to the manager to ensure that every player is amazing at their position, plays effectively with others, and is given new opportunities to develop. That's how we keep winning the championship (entertaining the world). Unlike a sports team, as Netflix grows, the number of players also grows. We work to foster players from the development leagues so they can become the stars of tomorrow".*

[Netflix. (February 14, 2024). Netflix Jobs. Retrieved from https://jobs.netflix.com/culture ]

Another very different type of cultural approach is **Zappos**:

*"Since our humble beginnings, Zappos has been a customer-obsessed company that focuses on delivering a WOW experience. We aim to inspire the world by showing it's possible to simultaneously deliver happiness to customers, as well as employees, vendors, shareholders, and the community, in a long-term, sustainable way. This vision led Zappos to deliver happiness through the four C's: Commerce, Customer Service, Company Culture, and Community."* [Zappos. (February 14, 2024). About Us. Retrieved from www.zappos.com/c/about ]

Another interesting fact that confirms the importance of employee experience, is that they came up with their values through a poll/survey open to every employee's contribution so that they define the culture.

And a radical type of culture, that requires a very forward-thinking and open-minded change agent is the one proposed by the **Corporate Rebels**. They aim to make work fun, by applying the aggressive and transformative trends within change-loving, brave businesses. Here are a few of them, integrated already successfully, within real companies, and described with abundant details in the hundreds of study cases they present:

**"From Profit to Purpose and Values"** - *"To be clear: we are not talking about a mission statement full of pretentious banalities (or what Americans call corporate bullshit). We are talking about crisp and clear causes that activate people inside and outside the organization.";*

**"From Hierarchical Pyramid to Network of Teams"** – *"Progressive organizations know the familiar pyramid is outdated. It simply does not fit with today's quickly changing environment. The rigidity of command-and-control does not promote agility, speed, and engagement."; "From Directive Leadership to Supporting Leadership" – "These leaders walk the talk. They embody the organization's mission and values. They are crucial to an organization's culture. They do everything in their power to remove barriers. They help their employees thrive. Authority is no longer linked to rank, but rather to the ability to lead by example.";*

*[…]*

***5. "From Rules & control to Freedom & trust"*** – *"Progressive organizations, […], act on the belief that employees are responsible adults who can be trusted. They don't need extensive control. They perform best when given a high degree of autonomy. They can be trusted to do their job in the way they see fit. They let employees decide where, when, and with whom to work."*

***6. "From Centralized authority to Distributed decision-making"*** – *"Progressive organizations tend to be highly decentralized. They act on the belief that employees on the frontline have the best understanding of customers, suppliers, and production machines. Therefore, frontline employees should make the majority of the decisions—if the aim is to be agile in responding to clients." [Corporate Rebels. (February 15, 2024). Bucketlist. The 8 trends. Retrieved from www.corporate-rebels.com/bucketlist/the-8-trends ]*

From classical family-like culture to revolutionary and upside-down organizational models, this makes me grateful for how much inspiration, potential, and knowledge there is, to set up the right culture for your company.

Let's review together, some of the main points of the classical Employee Experience, adapt them to small and medium companies, and see where, with limited resources (the number one reason for stagnation), business owners can do wonders with their company culture. All these are inspired by 5* luxury practices of taking care of their employees and simplified for self-implementation.

# Mission. Vision. Values

If you are a business owner, I am sure you went through this phase of defining the purpose of your business and the frame of its evolution, when detailing the business plan.

And it is so exciting to create something of your own, in your unique description, that aligns with what you believe in. We all know that bringing your employees to understand and live by your values is difficult, however if you don't at least try, you will never know.

If the Mission, Vision, and Values have not yet been defined for various reasons:

> "We are a small coffee shop, a neighborhood barber shop, a vegetable market, a two-person accounting firm, what possible mission-vision can we define?";
> "We don't know how to do it or what could be the benefits";
> "We are bakers, not copywriters, we would not even know what to write";
> "We don't have time for this, we need to work!"

…it is never too late. You can hire a consultancy company, use artificial intelligence, employ a freelancer on Fiverr, or you can start by educating yourself on what they mean and how can they help your business (it's enough to write these three words on any search engine and you will find countless explanations and examples; even more, with the help of AI, you can write and redefine them as much as you need until you are happy with the result).

I am a big promoter of self-educating, independent learning, and using smart tools, and, while outsourcing certain aspects of your business to experts it's the right and healthy thing to do (creating a professional website, book-keeping, marketing services, recruiting services, etc.), many details of your own, small business or startup can be self-implemented.

There are consultants, articles, and instruments that can far better explain and assist you with identifying the Mission, Vision, and Values. I intend to convince you of their importance, by proving the direct effects on all employees and customers related mini-processes and actions. They are the anchor, the reference point, the compass, and the measurement tool for your business performance.

Let's take a **Nails Salon** and outline the below:

***Mission:*** *Enhancing the confidence and natural expression of women!*
***Vision:*** *Using the latest trends in nail design, we aim to make each woman stand out.*
***Values:*** *Excellent Customer Service, High Quality Products, Creative Work*

These can remain beautiful words in the Business Plan or they can be (in various forms and shapes) the starting points of your online presentation page or professional reservations website, the first thing the employees see in a recruitment flyer or on social media, attracting the right applicants, the selection criteria at the interview (proven customer care skills, verified previous experience with quality products, demonstrated creative talent, etc.). Furthermore, they will guide the onboarding of the new employees by

- ➢ providing clear instructions and well-defined expectations and standards (for customer interaction, creativity levels, product usage);
- ➢ being a solid foundation for the training structure and career development plan (product knowledge and application, service behaviors, empowerment and creativity, latest trends updates);

- ➢ becoming explicit performance metrics and feedback sharing points (quality products incorporation, customer satisfaction, well-defined creativity levels, adaptability to new technologies);
- ➢ becoming obvious reasons for appreciation and recognition: product upsell, positive reviews, loyal clients acquisition, record sales, most creative work of the month, etc.

And what I just wrote above without putting in too much effort, can become a very good beginning for a well-defined small business, with a clear structure and transparent plan for all employees and the future of the company. Does it take time and effort to build all these? Definitely yes, I never implied it would be easy. Is it possible to self-implement it? Again, definitely yes, even more so, when all the information and support you need are one click away.

# Attracting | Recruiting | Selecting – The First Impression

### Attracting

I have been asked many times, at jobs and career fairs, school presentations, and hospitality university campus visits, “What qualities are you looking for in a candidate, when recruiting for a luxury hospitality brand?” and my answer would always disappoint, in its simplicity: “We are looking for a big smile, engaging eye contact and vivid curiosity, we can teach you the rest!”. Of course, the list of skills that a luxury service professional acquires is immensely longer, but the three qualities are a brilliant foundation to build on.

Attracting the right candidates for your small firm vacancy starts with clarifying, for yourself first, what profiles would best perform within the culture you created, the working conditions, the retribution you provide, and the results that you expect!

A generic post on Facebook from a Pet Shop

***We are looking for a new colleague to join our team!***
***Send your CVs at petshop@email.com***

…would generate a lot of messages, questions, and maybe emails and CVs (and if this was your intention, congrats on the strategy!).

But for me this means time spent answering questions that could have been clarified in a better-formulated post, selecting through many accidental applications that have no connection to what you are looking for (what are you looking for?), frustration from not finding suitable candidates, disappointment with the system, and delays in building the team, and serving the customers right.

There are free workshops, online courses, and ChatGPT instructions that can better assist you in writing an attractive and specific job post, and even advise you where and when to post it for optimal outcomes; or fee-based consultancy companies that do this for you entirely. So, the difference between that post on Facebook and a result-oriented one is a matter of interest and exploration.

I advocate for this, for seeing this difference, and for leveraging this difference in small and medium companies too, after all, this creates the first impression of your future employees.

Putting the comparisons aside, if you are holding on and choosing the first Job Advert because you don’t have an internationally known brand, a dedicated team of human resources experts, the money for a proper recruitment-marketing campaign, or an employer branding transformation, you are underestimating your value and undermine your success.

> **"Are you a cat-person or a dog-person? This is the question!**
> *We don't need to know the answer, only wanted to catch your attention!*
>
> We're looking for a new colleague, an all-animals-person, to work as a Shop Assistant, and help pet owners choose the best products for their fur babies! Ideal candidates have an engaging personality, can manage simple cash transactions, and have proven team experience.
> *Our location is here …, we offer this much salary…, other benefits are…, and the working hours are … If you smiled while reading this, send your CV to petshop@mail.com".*

## Recruiting

The golden rule of recruitment is:

**treating the candidates as you would treat your customers *(assuming it is nothing less than excellent),* or as you would want them to serve your customers**.

In a call, email, or message, use the same principles:

- add the proper greeting;
- use their name;
- present yourself;
- establish the context (You applied for…, You were recommended by…);
- thank them for the interest;
- add the clear details of a meeting, video call or in-person interview;
- offer timeframe options and flexibility;
- if you want to impress, personalize the interaction using a specific detail from the CV that caught your attention;
- keep an enthusiastic tone;
- end-all in a positive note.

Why should you settle for less than this?

➢ Because it's "just" a sales assistant job, not a CEO?
  - Well, all potential employees that would directly interact with your customers (and not only) deserve CEO-level treatment, in this way, you are setting expectations from the start, you are building your reputation, and you may even create a natural selection effect.

➢ "Because I don't have time to spend on luxurious emails and flattering calls, I need to fill in a vacancy!"
  - Well, if you need to, then do it at its best, it takes less than 3 minutes to write the structure of an email, even less if you use smart tools, multiplied by 10 candidates (minus 1 minute per candidate due to the copy-paste of the repetitive details) it means 20 minutes well invested! Or while you are screening the CVs, put the unique details in an Excel sheet (name, job, type of meeting, timeframe options, special note from the CV, etc.) and use mail merge or any similar system to simultaneously reach all candidates.

I was always ambitious to challenge the status quo, and consistently asked myself (or burst other colleagues' bubble with the same question), is there a better, faster, more enjoyable way to do this (related to any process I was in charge of)? And in most of the cases, there was!

### *Match the exemplary first contact you made with an interview or discussion on the same level.*

Some of the responsibilities of the recruiter role (that business owners, entrepreneurs, and department heads find themselves in) are misunderstood, replaced by:

- a superiority complex ("I am doing you a favor by interviewing you"),
- biased attitudes (asking unrelated or too personal questions, for example), or
- unnecessary intimidating techniques (unless recruiting spies or crisis managers, but I would not know).

All these bring the candidates into anxiety mode, unable to present their value, intimidated, and even humiliated, leaving you with a missed opportunity of meeting a great person. There is no need for all this (although the reality contradicts me, still).

**Some of the undervalued responsibilities of the recruiter are:**

- to make the candidate feel comfortable, physically and emotionally.
- to ask the right questions or, better said, to formulate the questions properly. *[If the interviewer asks: what would you do if a customer would become angry and complain? The candidates can recite all their favorite paragraphs from the latest book or article on complaints handling they read, charming you into thinking that is actually how they would react. But all remains hypothetical, just like the question. If, however, one would ask: "Give me an example of a customer complaint you handled, presenting the context, your actions and the result" well the answers will be different, in the form of a story, of an event that happened in the past that gives you a better measure of candidate's previous behaviors so you can better predict the future reactions (search for "STAR Interview techniques" in any browser, there is much more to explore, you will find examples, definitions, and clear instructions).]*
- to speak less than the candidate, yes, the interview is about the candidate (yes, company presentation and job details are essential to create the context, but more than this is unnecessary).
- to help the candidates answer (not to answer for them, of course, but to be a guide, after all, you are more interested in their past experience than their ability to answer under stress) by asking follow-up questions, reformulating, and postponing some questions if needed.
- to be realistic and respectful: it's fine to discuss the salary from the start, and explain all the quirks of the job;

And, it's fine to tell the candidate if you will not be moving further with their application because someone else fits the profile better; It's fine to be sincere and tell the candidates they are not suitable for this particular job, or at this specific moment. It's not fine to create false hopes and never contact the candidate again. It's not fine to postpone or ignore writing a rejection email or making a call just because it's uncomfortable.

**Selecting** the best candidate remains for me, after thousands of recruitment projects, a matter of intuition, backed up by correctly collected facts during the interviews. And I feel this formula would work well for the small and medium companies as well. Bringing a new team member within a small team is a delicate matter, the margin for error should be as small as possible, and a business owner cannot afford to unsettle the good dynamic of the team by making a superficial selection. Sometimes you are certain from the first hello, other times you need more confirmations, or you cannot decide between two great candidates. There are a few traps that an inexperienced interviewer can fall into:

**underestimating the power of active listening** - maybe because they already like the candidate or identify with them, they are hearing what they want to hear, and miss to follow up when the candidates presents everything as "we did…, we solved…, we managed to…, we succeeded", giving no actual details about how they personally and directly contributed; or maybe they are saying all the right words so the interviewer does not hear "In general…", "Usually…" that are introducing a general theoretical answer, so not related to an actual past experience; or the "If I would be in this situation… I would…" that is the frame for a hypothetical answer which brings no better understanding about the real used behaviors;

**writing down opinions** ("the candidate is organized") rather than facts, or actual phrases verbalized by the candidate ("I made a plan, I started with a structure, then consulted with the leader, then added in the details, informed the team, and moved on to execution"), the second way could seem longer and more difficult to capture but it will serve as a great resource in the decision process;

**being unprepared** - not reading the CV, even in a quick manner; not having a plan of the questions they want to address based on the profile, using only classical and present based questions like: tell me about yourself! where do you see yourself in 5 years? are you a good team-player? (who would say NO to this?);

**not testing the contrary** - definitely, the candidate will choose the answers that best describe his positive experiences, so sometimes it's necessary to test the contrary; for example, "Please tell me about an experience you had with a customer when you managed to offer services beyond their expectations" vs. "Please provide an example of a situation when you did not manage to meet the customer's expectations / when you regret a decision you took/ when you felt disappointed with a behavior / when you argued with a colleague". And if the answers start with "Oh, but I am a good team-player, I do not have arguments with my colleagues" or "I don't remember disappointing a customer…" then there is more to discuss there.

Going back to the dilemma, of how to select the best candidate, if you have done your part interviewing with responsibility, being present (free from biases, subjective lenses, using follow-up techniques, sounds so much easier said than done, I know), being nice (yes, nice, as much as a candidate may need the job, that much you need a good candidate) and correctly collecting details, then, you will know who is best for your team!

If it's still difficult, ask a friend to help you decide, involve a colleague in the interviews, ask for second opinions, and discuss pluses and minuses of candidates' experience. Just don't rush and superficialize the process, it's not worth your time, and since the recruitment projects in small and medium businesses are isolated events, they might as well be allocated the necessary importance.

> *I happily call to mind being wholeheartedly involved in a mass-recruitment campaign for a hotel opening, to successfully attract, recruit, and select 300 new employees, in 3 months, with a team of 3 HR professionals and 6 heads of departments. Maybe I was too young and overconfident because I only remember thinking "How cool is this!!", although there would be weeks after weeks of conducting 8 to 9 interviews a day, filling out comprehensive documentation for each candidate, adjusting an intricated scheduling system and choosing an unhealthy way of using the breaks to screen more CVs or call to make new appointments. Imagine the number of details we could have missed (and for sure we missed some) without a meticulous plan, everyone's involvement, and the amazing know-how, previous experience, instruments, and resources the company offered.*

# Onboarding Experience - The Second Impression

Wonderful, you made a decision and you are happy and confident with the selected candidate! **Cannot wait to see them becoming productive and an immediate great addition to the team, right?**

You may or may not have experienced the feeling of the first day on the new job, within a new team (depending if you have ever been employed or an entrepreneur since the beginning) but applying empathy is essential at this stage. What would a new person feel, need, or find useful in the first few days, weeks, or months of a new employment?

There are simple, free, and time-effective ways of making new joiners feel welcomed and use their initial natural enthusiasm to build strong relationships and ease the transfer of knowledge and new behaviors.

The onboarding starts with the email or call that confirms the selection ***"Congratulations, you have been chosen for the role, we look forward to welcoming you to our team!".*** To prove consistency with the previous steps in recruiting the candidate and to create a strong first impression for, what now has become, your team member, choose the best version of this process, adapted to your small business or startup. It could be a one-time preparation project that would only require small adjustments on the way.

I propose the following **ONBOARDING KIT** for small teams:

➢ **The confirmation email –** keep the same elements: using the name, extending congratulations, listing necessary documents required, clearly explaining the next steps, describing eventual attachment and their purpose (work contract, company booklet, etc.), reinforcing the excitement for future collaboration, offer to clarify potential questions, etc.

➢ **Company booklet** – a beautifully designed, digital overview of the business (you can use free online tools to put everything together and apply an attractive design, you can employ a freelancer or a consultancy company, one time, to create the structure and the visuals):

- history, mission, vision, values, founders, and milestones;
- colleagues' roles, preferences, interests, and personalities;
- products and/or services description;
- service standards or performance standards;
- norms and rules;
- a list of employee benefits, etc.

Of course, you can choose only a few of these or add more, but putting all these details together and maybe attaching the PDF to the initial email, will save you time, create a pre-introduction, and give the new joiner insights into his new job atmosphere.

If the time between selection and the actual start date is long, make sure to check in with the new joiner from time to time, ideally twice per month (offer to clarify potential questions, ask for interests and preferences - favorite drink, preferred color, dietary details or preferences, etc., collecting documents, suggest exploring the company website and to familiarize themselves with the content of the company booklet, etc.), and send them an inspiring and encouraging message the day before actually joining.

➢ **Welcome:** Imagine starting your new job, arriving in an unfamiliar place, with unknown faces to find everyone busy with their tasks, asking who you are and what you want and appearing surprised when you tell them you are a new colleague, starting that day! Unless this is a first-day prank finishing fast and immediately overcompensated by a great welcome, then the discomfort of this kind of start is intense.

To avoid this (unfortunately still grim reality), inform the team about the new member, ask them to learn the name, tell them about their previous experience, share details you might have about their interest and preferences, and even discuss together some welcome ideas.

If a meeting takes too much time, collect all the content in a message or email and send it through the common groups. Assign a person responsible or be the first contact person. Prepare a welcome banner, blackboard handwritten message, or an A4 page adding maybe a flattering picture.

Put together a welcome pack including a small gift (samples of your products, voucher, favorite sweets or snack, etc.). Now imagine the same feeling of the same new joiner arriving on the first day, being saluted by every employee they meet with "Hello Mary", "Welcome", "Have a great first day!", being acknowledged, warmly greeted, given clear guidelines about how the day would go, even surprised by the personalized gift and attention.

A simple welcome agenda would include:

- finalizing all legal documents requirements (work contract and annexes, data protection agreement, work safety instructions, emergency response, cash handling guidelines, grooming standards, norms and regulations, etc.);
- tools and systems setup (access to computer, various systems user creation, etc.);
- explaining the training on the job plan (the flow of learning, from simple to complicated);
- clarifying expectation of behaviors, learning progress and attitude.

The first day should be about observing, shadowing, and assisting with small tasks, no matter the previous experience, it's important first to understand the dynamics, working styles, habits, and expected quality levels in the new job.

➢ The **training on the job** tool should be clearly defined, ideally for each separate role, including specific timeframes of learning and arriving at demonstrated skills.

For example, a new colleague is starting as a receptionist at a small, private, medical clinic. In the first week, she will be shadowing the other receptionist, taking notes, asking questions, receiving explanations on what and how the steps are followed, and expected to proactively greet the patients using the standards, professionally accompany them to the doctor's cabinet, display language diversity, support the team with simple tasks as copying documents, introducing data in the system, etc.

The objectives of the first week are:

- to know all the doctors, their specialty, and schedules by using the internal system;
- to independently and completely handle a booking call;
- to gain extended space orientation, and to be able to find what she needs in a short time.

The same should happen with the second week, with clear learning objectives and actions to reach them.

➢ The **first performance discussion** – if not triggered earlier by an obvious reason of gross underperformance or mistakes, the first discussions should be scheduled one month after the first day, with the plain purpose of understanding how the new joiner feels about the job, what the strong and weak points of their performance during the first month, to congratulate them for the attitude and encourage to learn from mistakes.

I hope by now I have given you a fresh approach for your company's relationship with the candidates and new joiners or, at least, the choice to aim for better. I am confident that you can now see the difference between hiring and creating an experience. The decision to go with the first or the second only belongs to you.

Further, we'll explore other indispensable human resources practices and focus on how to integrate them in small and medium companies, without disrupting the workflow, more so, we will look at how can they be valuable experiences rather than time-consuming requirements.

# Continuous Learning

Focusing on continuous training in small and medium companies and startups, now that's a struggle!

**"We don't have** internal trainers, money to invest in external training, or time to block the employees for a big part of the day in the learning room (or even a learning room)!";

**"We learn by doing!** There are so many different situations we encounter daily that we cannot not learn from them!"

Of course, this is my favorite way of learning too (however frustrating and resources wasting it may be sometimes, because I am the type of person who, when assembling a simple Ikea product, starts doing it before reading the instructions or inventorying the parts). But the "learning by doing" is not enough to promote the growth unless it has a systematic approach: a weekly debriefing of the situations and summarizing of learning elements; a category-based, targeted learning topics agenda (service skills, product knowledge, soft skills, technology, personal development, etc.), a personalized training needs assessment to correctly identify development necessities; I know, I am going too far.

Continuous training in a small business can very well exist and thrive, without feeling like a burden or a time waster, but with the necessary pressure of planning and being consistent. In the second part of this guide (Serving the Customer - Reinforcement), you will find a practical application of how a basic habit of "10-minute daily meetings" can be a very suitable and organized learning system for a small team company.

**Let's take another pragmatic example!**

Imagine a small, independent bookkeeping firm, with 5 employees, fairly paid, functioning well, for two years now, with a good (but not great) base of clients and with very few, but fine, reviews (for example "their work is correct and I can count on them to have everything handled"), the team is working well, with small unbalances and disturbances (but all teams have these), the employees are ok (whatever "ok" means for each one). In this context, the leader (owner/entrepreneur) feels the need for some training, to motivate the employees, maybe boost the revenue, have better reviews, and change things around.

The only way they know how to start is either by self-proclaiming a multi-knowledge trainer (a risky move if they have never been trainers before) or by looking for companies that organize training (move past the cost for the research), find some interesting ones (that they like, for themselves), then see that they require two-days participation per employee (which means, two days out of the office (shocked emoji)) and finally get back to see the prices and give up altogether!

**LET'S RETHINK THIS APPROACH**: from the brief context described we can see that performance and mood are average and the leader feels the need for a push (motivation, revenue, reviews).

The next best thing is looking for ***the real cause of this averageness***, this can be done by directly asking the team members in the following meeting (preparing specific questions, in their positive version:

- "What are 3 actions we could take to boost our energy in the office"
- "What are 2 ways in which we can improve our relationship with the clients"
- "Name 3 things that would make you happier and more accomplished with your job?"
- "Would you like to learn something new? Name 3 topics?"
- "What can I do, as your leader, to improve your work experience?"

…but often this has proved to be inefficient, as once directly addressed, very few find ideas or suggestions on the spot or feel confident to voice concerns in public. So, either you will end up with a "it's all fine" or less than that.

***ANOTHER WAY*** of doing this is to inform the team about planning to improve the working context for excellent results for all, and that you need their help (prepare for resistance to the idea of change, even if it only brings benefits!).

Create a structured and specific online survey, with the option to remain anonymous (I know, a bit difficult in a team of 5), focusing on brainstorming improvement ideas. You can take advantage of the detailed and fast work of artificial intelligence: by using free survey platforms like Google Forms, SurveyMonkey (or many others), and choosing any text generator applications to help you with the questions, this can be done in 30 minutes. The questions and the way they are formulated will 100% reflect the quality of the answers. Here are a few examples to add to the ones above:

- "List a minimum of 3 new skills and/or technical knowledge you would like to learn in the finance area";
- "Choose from the list below, what soft skills you would be interested to learn: Communication, Emotional Intelligence, Team Work, Problem Solving, Feedback, Active Listening, Language Skills, None, Others, etc";
- "What Customer Service Skills would you like to develop: "Writing Emails, Conflict Resolution, Complaints Handling, Service Principles, Building Relationships, Getting positive reviews, None, Others";
- "What are your 2 preferred ways of learning: Online, In-Class, Microlearning Sessions, On the Job, Cross-Training, Reading and Sharing, Shadowing and Observing, None, Others";
- "What personal well-being activities would you like to participate in: Yoga, Mindfulness, Meditation, Nutrition, Physical activities, etc., Team competitions and games, Reading and books sharing, None, Others, etc.".

By now, I am sure you understand where I am going with this. Making it an online form, you can allow enough time to think and respond, privacy for the answers, space for suggestions, and a fast centralization and overview of the results.

Analyzing the data should help you formulate the learning plan around specific objectives, even aiming to make this an annual practice: assessment, goal setting, planning and executing a training calendar, measurement, and the cycle can start again. In this case setting specific learning objectives, SMART goals (Simple, Measurable, Achievable, Realistic, Time framed), becomes necessary:

- Energizing the team by organizing one well-being activity monthly, by the end of the year;
- Learning and applying 5 new customer service behaviors by the end of the year;
- Obtaining 10 more reviews from customers in the next 3 months;
- Increase the quality of reviews from 3.8 to 4.4 in the next 6 months;
- Adding 5 more clients to our portfolio in the next 6 months;
- Expand our practice of soft skills with 2 monthly microlearning sessions for the next 6 months;
- Increase the revenue by 15% in the next 10 months;
- Each employee will complete 15 hours of cross-training in a different discipline by the end of the year;
- We will sum up a total of 30 learning hours per employee per year, per team member.

Based on what the majority has answered to your survey and adding your observation in the mix (learning styles, interests, development levels, performance levels), you can easily come up with a Monthly (even Yearly) Calendar of Learning.

Before throwing in training topics, it's important to establish:

- **the best timeframes and frequency**
  - 1, 2, or 3 times a week, start gradually, depending on the topic;
  - Monday is too hard as it is;
  - Friday is followed by the weekend, no chance to practice, unless it is a personal theme;
  - mornings are busy, afternoons are not ideal to absorb new knowledge, even less likely after lunch;
  - 2 hours long sessions require professional preparation and a lot of "out of office time";
  - 20 minutes seems too rushed)
- **favorite delivery methods** (power point preparation, flipchart discussion, online screen, guided conversations, role plays and simulations, etc.);
- **the facilitators** (the leader, everyone on a rotation basis, volunteering, external experts, some are very willing to come for free).

I am going ahead and selecting Tuesday, Wednesday, and Thursday, at 11.00 am, a 40-minute (maximum) class. A blend of microlearning sessions, read and share, bring an expert (maybe one of the close clients), and free online courses; combining technical expertise, soft skills, customer service skills, wellbeing activities, and personal interests.

Allow me to briefly define some of the methods that can be used in small and medium companies, given the short time allocated for preparation, the fun aspect of quick learning, and the minimal resources invested. You don't need to be a professional trainer to facilitate a 30-minute session on a theme of your interest, to the point of just reading an interesting article, guide about and new subject even for you, creating a summary, and sharing it with your colleagues in a learning mini session.

Volunteering to facilitate or the rotation-based responsibility will indirectly add new skills to the team: preparation, facilitation, speaking in front of the team, etc. Having a structured plan, and a monthly calendar, brings simplicity, creates excitement, and offers clarity.

Microlearning - it's a short portion of learning, on any topic of interest, online or in person, created and facilitated by a person with experience in the chosen area, centered around a clear objective, for example: "understanding the interdependence between data entry and reconciliation, to improve accuracy."

Online Session – a short training module, focusing on a clear goal, that employees can navigate and discuss together, or go through individually when they prefer: "Examples and Benefits of using Empathy in the workplace"

Read and share – decide on a topic or let it be a surprise. The facilitator would read an article, guide, essay, or even book and prepare to present the summary and the learnings with the team.

Cross-Training – Ideal for developing skills in multiple areas, used as a base for lateral transfers and career plans, or for having a strong replacement when someone is sick, on a work trip, or has resigned. Each employee could express interest in a different area of their work and schedule, short sessions of learning while doing, with the expert from that area.

Shadowing – for a similar purpose as cross-training and excellent for new joiners, this allows observation, asking questions, and performing simple tasks to better understand and learn in a new field.

Guest Expert – It's always great to welcome guest experts, from areas that are of interest but still unfamiliar, for example bringing a hospitality professional, in a small bookkeeping firm, to talk about customer care.

Watch and debrief – select a topic of curiosity, find an online video from a certified source, watch together with the team, and debrief to withdraw the learning point.

Brainstorming – a very good exercise of generating ideas from the participants on issues of the matter, based on the principle that no suggestions can be judged, questioned, or commented on, but only written down and later on analyzed! This can be paired with a "best idea" selection debate and action plan.

Flipchart discussion – the facilitator brings in questions related to product, service, and business metrics and asks for team input, which could be in the form of pluses and minuses, brainstorming ideas, positive vs negative views, etc.

Guided Conversation – ideal for inspirational topics, like sharing gratitude, giving thanks, getting to know each other, knowing the customers better, organizing the Christmas party, or decorating the office.

## Learning Calendar - July 2024 – Finance Team

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|
| 1 | 2<br>**"Secrets of Fast Learning"** TedX Video +Debriefing.<br>11.00-11.30, **by Mary** | 3 | 4<br>**"Basic emotions"**<br>Read & Share<br>11.00 - 11:30,<br>**by Adam** | 5 |
| 8 | 9 | 10<br>**"Customer Care Basics Behaviors"**<br>Microlearning<br>11:00–11:45,<br>**By Ana, Guest Expert** | 11 | 12 |
| 15 | 16<br>**"Asking the right question!"**<br>Microlearning + Exercise<br>11.00–11:30, **by Sarah** | 17 | 18 | 19<br>"Bring your favorite fruit to work (and share)!"<br>**by All** |
| 22 | 23<br>**"Getting positive reviews"**<br>Brainstorming + Action Plan<br>11.00 – 11:30, **by Dan** | 24 | 25<br>Service Behavior: **"Using the Name"**<br>Flipchart Discussion + Action plan<br>11:00 – 11:30, **by Hellen** | 26 |
| 29 | 30 | 31<br>Challenge: **Write a (secret) thank you feedback to one colleague!**<br>9.00 – 11.30, **by All** | 1 | 2 |

If one small and medium company owner, sees the benefits in this, I am happy already.

***Because it takes courage and implicit, vulnerability to change.***

The time and creative effort invested, one time per year, to assess, involve the team in planning and executing a targeted microlearning calendar, and measure the impact, would have been the best free and sincere investment in your employees.

Revising the goals you set, measuring progress, and celebrating success comes as a natural follow-up to your hard work.

The level of personalization of this approach to learning has no limits. You can choose 2 microlearning sessions per month or five per week, as long as the team welcomes that frequency, loves the content, and participates enthusiastically.

Bigger businesses that allocate funds for development will add external training participation, industry conferences, licenses and certifications upgrades (on top of the mandatory ones), specific workshops, and teambuilding projects.

# Performance Review and Feedback

If Performance Management sounds too pretentious and maybe unnecessary for small businesses, a lighter version of it, a structured feedback system works perfectly. For years I have managed robust, rigid, and complicated performance management processes, for hundreds of employees at all career levels, based on thorough documentation and with impact on salary increase. This experience helps me simplify this necessary routine for the benefit of small and medium companies.

Regardless of the industry, or the size of the business, the **BASIC ELEMENTS** are:

- expectations (key performance indicators, quantifiable goals and targets, observable behaviors, standards of executions, etc.);
- level (excellent, very good, good, poor),
- feedback (specific facts and measurements, accurate observations, customers reviews, colleagues' reviews);
- development plan (areas to improve, new aspects to learn, transitioning to new roles).

Even this basic form sounds complicated, I know, and I agree with you.
Add to this, some natural fears and holdbacks people (who happen to be leaders) have:

- ***avoiding conflict***
- ***fear of confrontation***
- ***fear to upset the team members***
- ***lack of knowledge about giving and receiving feedback***
- ***basing all on spontaneity with minimum or no preparation***

**…** and you have enough reasons to ignore this process altogether!

But it does not have to be this way, caring about your employees means also contributing to their development and this cannot be done without feedback discussions (even with your star employees) and setting clear objectives.

And you, as a leader, have the responsibility to learn how to do this right, it's a very influential tool; done without consideration it can crush the motivation of your best employee, stir frustration, enable the wrong behaviors, or keep damaging issues latent.

## LET'S SIMPLIFY THE NECESSARY ELEMENTS.

### the Expectations

Without clarifying expectations (yes, even the most basic ones like smiling to the customer), all results must be accepted as satisfactory. Now think of the team members who represent your business, and spend 10 minutes, writing down, some expectations, the desired state ("How I want my employees to behave and perform?"):

- ➢ general behaviors (being polite, showing respect, helping others, being punctual, etc.);
- ➢ customer interactions (smile and eye contact, positive tone, upselling the products, proactivity, etc.);
- ➢ performance (work accuracy, quantity and quality, targets, numbers, problem-solving, etc.).

You can keep it as simple as you want or add as many as you think imperative, but never assume some are by default known and guaranteed (like, of course, I expect employees to be polite or smile at the customer!). You now, have in front of you, the basis for future performance discussions and continuous feedback conversations.

To certify these, they have to be **shared, acknowledged, and understood** by your team member and, most importantly, role-modeled by you! You can add them to the employee handbook and present them in the onboarding phase, make a separate, job-based, personalized sheet for each employee, discuss them on the flipchart at the next meeting, send a comprehensive email, and debrief the next day, create a large poster and display it in the office and refer to it in your meetings, there could be so many ways, adapted to your environment, to publicly share the expectations.

### the Level

An essential step for providing meaningful feedback is clarifying the levels of performance for each of the necessary competencies in your company. Each job/role is defined by a set of behaviors, knowledge and attitudes (put together, these three aspects create a competency), so clarifying the criteria for low and high performance for each one, will set the tone for the other processes: clarifying expectations, formulating feedback, the recognition system, the disciplinary actions, etc.

## Competency = Knowledge + Skill + Attitude

Example: Smiling when interacting with customers and colleagues

- **Knowledge:** understanding the importance of smiling, cultural implication, when NOT to smile
- **Skill:** practice the behavior with every interaction, measure the impact it has on building relationships, observe the power it holds on improving the atmosphere/the mood;
- **Attitude:** positive attitude, desire to help, passion for service, interest for creating strong relationships, care for the other person.

Here are the 4 criteria I am proposing:

**Poor Level**

| **Definition** | Example: **Smiling when interacting with customers and colleagues** | **Observations** |
|---|---|---|
| Complete lack or very limited display of the competency. | • little to no smiling while interacting with colleagues and customers;<br>• the smile is replaced by a frowned, bothered, annoyed, bored, angry expression; | Observing this level can tell you that there is an underlying condition and it requires immediate addressing of the situation |

Of course, if "poor" had been describing the performance level of a cashier (like money transaction accuracy), then the situation would even require disciplinary actions or contract terminations.

Could we do the same for a "smile"? There are other routes to take first (and learning the cause), but given the power of the smile in customer-facing businesses, I would say at least, temporarily moving to a back office if no improvement, given the chance to do so.

## Good Level

| **Definition** | Example: **Smiling when interacting with customers and colleagues** | **Observations** |
|---|---|---|
| Limited display of the competency. Continuous reinforcement is necessary. | • sometimes smiling in interactions, depending on the mood, requiring regular reminders;<br>• showing limited consistency;<br>• displaying a fake, forced, or sarcastic smile. | In this case, capitalizing on potential and understanding the motive of the fluctuation in behavior could be the next immediate step. |

## Very Good Level

| **Definition** | Example: **Smiling when interacting with customers and colleagues** | **Observations** |
|---|---|---|
| The competency is displayed on a regular basis, with limited or no reinforcement, with positive effects on customers and colleagues' interactions. | • using the smile in most of the internal and external interactions, when appropriate;<br>• displaying a genuine smile;<br>• contributing to an overall positive atmosphere;<br>• receiving favorable reviews from the customers. | Is this the level you want to see practiced in your company? Why would you settle for less and how can you help maintain this? Well through acknowledgement and encouragement, in person and public. Yes, that's it. |

## Excellent Level

| Definition | Example: **Smiling when interacting with customers and colleagues** | Observations |
|---|---|---|
| The competency is displayed consistently, with no reinforcement, creating beyond expectations effects on all relationships. The employee could be considered a role-model at this competency and could help other develop it. | • smiles consistently and genuinely throughout interactions, when culturally or situationally adequate;<br>• helps improve the customers' and colleagues' mood by using a sincere almost transferable smile<br>• helps turn some complaints into opportunities by displaying an understanding and confident smile.<br>• represents a role model when it comes to exemplifying the "smiling" tool;<br>• can make the difference between personal and professional mode, managing to professionally smile even if going through personal conflicts.<br>• the customers' reviews almost always mention the big smile and associate this with great service. | How can you appreciate this level? Reconfirm the importance in your feedback session, publicly and consistently acknowledge the outstanding display, invent a special award, make the person a coach for that skill, share positive reviews, create incentives, etc. |

***The worst way to appreciate a great behavior is to take it for granted.***

All behaviors (and expectations) can be quantified, but this is not the purpose of the above differentiation of levels, my wish is to help you understand the distinction of expectations degrees, so you can naturally build your feedback content and have a comparison panel.

### the Feedback

There are numerous feedback theories, I will, however, focus on a simplified version, for this guide. The primary definition of feedback, adapted to a business environment, would be regular, spontaneous, or prepared conversations, focused on what the employees are doing great and where they need improvement compared to previously shared expectations and targets, to acknowledge and maintain or improve certain behaviors and performance standards.

Here are some important aspects of offering feedback:

**Timeliness** (this is a great skill to have as a leader, showing presence through feedback) – observing an excellent or a poor level of behavior requires immediate feedback. The more time it passes from the actual observations the less relevant it is (that's why, sticking to an inflexible system of yearly review or quarterly feedback would not be so valuable in small or medium businesses).

*"Wow, Mary, I saw (or the supervisor described to me) the way you handled the complaint with that regular customer who was disappointed that we don't have a table for him. You showed real skills of proactivity and problem-solving! Thank you!".*

Yes, this is easy, you would say, everyone wants to share and hear positive feedback! But did you notice:

- the name usage,
- the specificity of the situation,
- presenting the source of the information (the supervisor),
- the sincere thanks?

They do not happen automatically, and most times, this would go unnoticed, in the end, Mary was doing her job handling a complaint, but, if the level has been excellent, you, as a leader, need to remember to acknowledge it on the spot! **And I agree with you, it may be easier, sharing the positive.**

What about constructive (and negatively perceived) feedback:

*"Hey Mary, I want to talk to you about what happened this morning/yesterday, when you blamed your colleague, in front of the customer, when she claimed the order was wrong.*
***What happened there?*** *(listen, just listen, no judgment, no lessons, no interruptions).*
***How do you think this made us look in that customer's eyes?***
***How do you think your colleague felt?***
***What do you think it solved?***
*Let me remind you about the expectation: we are a team and when one of our colleagues does something wrong, the priority is to correct the mistake as best as possible so the customer leaves happy, maintain a positive vibe in front of the clients, definitely not blaming, and when time permits, address the impact of this mistake on your situation with the respective colleague.*
***What can I do to help you learn from this?".***

If this is a caring example of sharing timeliness and constructive feedback at a very good level, leaders are human too, and without the right knowledge, this can come out poorly too: (in front of the team, maybe even clients):

*"Mary, I am disappointed in you (as if she, as a person is disappointing, not her isolated interaction mistake!)! How could you do that in front of a customer? Would you like to be blamed like that for a mistake you made? (umm, and what are you publicly doing now, what is it called?), I don't want to see this kind of action around here anymore, is it clear?".*

**JUST A RHETORICAL QUESTION:** how is Mery feeling and learning after each of the interactions?

**Structure**

If you don't have enough practice to come up with a structured and positive way of formulating feedback, then you need a minimum preparation before you plan to share. We discussed above the importance of timeliness feedback when we observe excellent or poor levels of execution.

**What about the middle degrees (good and very good) or a broader panel of performance indicators?**

I find it necessary and fair, for small and medium businesses to regulate, short feedback discussions between the team leader/leader and the team members/employees, monthly (if nothing major or noticeable happens in the meantime, that would require immediate feedback). All those who are in the role of providing feedback must learn how to do it optimally.

And, preferably, one leader should have discussions with a maximum of 5 employees per month, using either a rotation basis or a hierarchical allocation of the team members. If more than this is covered, it will become a burden and create the grounds for a superficial and forced discussion.

What is the structure for regular feedback:

➢ **Preparation**.

Assuming everyone is aware of the expectations you have listed and shared at the beginning or when they were hired, think of the team members you are planning the discussions with, and select one excellent and two very good/good/poor behaviors/metrics to focus your conversation on.

*(of course, you can adapt this to what is happening in reality, but if you have to address 3 poor behaviors it means you have minimized the importance of timeliness, or if you only focus on good and add improvement plans, the motivation is going to fade, you need to find something encouraging to share as well).*

Collect:

- examples,
- observations,
- employee feedback,
- customer reviews,
- goals measurements,
- sales targets.

…as many facts as you need to have a concrete reason for positive or constructive feedback.

Verify your source and remove all that minimizing responsibility like:

- I heard…
- someone said…
- I think…
- you never…
- in general…

…and replace all these with facts for both the positive acknowledgments and the improvement.

Draft the structure of a discussion, even in your head, to make sure you know the message, the outcome, and the learning plan.

➢ **The discussion**

Know what you are going to say, and keep a positive tone, although you may be talking about mistakes, shortcomings, and improvements.

Be present in the discussion so you can also perceive the "emotional" implications. All feedback sessions can trigger **anxiety, nervousness, fear, and defensiveness**, and only you are responsible for changing this perception or reality, by helping the employee feel comfortable, acknowledging feelings, accepting mistakes and extracting learning, allowing venting and own point of view expression.

If you bring in opinions and generalizations, you create an unfair discussion from the start, if you use facts and examples, you help the employee see your angle better.

Be careful with using constructions like: ***"you are great with customers, but…"*** everything you say before "… but/however", will be erased and replaced by negative.

You can separate like this: ***"I congratulate/thank you for these: examples and facts of very good performance AND you need to work on/improve these skills: examples and backup facts".***

End on an encouraging and upbeat tone, this will inspire motivation rather than the "I am no good!" feeling most of us had after a mistake-focused feedback discussion.

## The Action Plan

This step should highlight, as the name says, the next actions.

**"You need to get better at this, or improve the score, or sell more, or do better"** may sound like instructions or goals, but all of them (apart from the fact that they are insultingly vague and empty of content), are useless and unmeasurable. They can be mere introductions to the clear action plan you will present and finalize with the employee.

And here is the recurrent theme of learning to be specific! An important suggestion would be to involve the employee. They may know already what to do to improve or change, so start from there, and ask!

Use these questions if you want to make sure everything is covered:

- ➢ what (objective)? (what to improve: work speed, upselling, customer email writing, handling complaints, sales numbers);
- ➢ how (actions/checklist)? *(make 10 follow-up calls per shift, upsell 5 special offer items per day, zero written complaints per week, 3 positive client reviews using your name in the next week; maintain smile and eye contact during interactions, etc.)*;
- ➢ who (buddy/resource person who can help the employee with knowledge or support);
- ➢ with what? (tools, knowledge, instruments, systems).

Increasing the sales of pastry items by 5% next month is your objective as a leader (with actions such as special offers, combos, pairings, advertisements, happy hours, etc.), and needs to be cascaded correctly and translated into actions for the first-line employees:

- upsell this pastry with each coffee;
- present the offer to each customer;
- offer it as the first choice when the client asks for pastry or is undecided;
- make the poster visible;
- attractively arrange the pastry, etc.

Other important elements for offering constructive feedback:

- ➢ **focus on the actions and behaviors, not the person** ("you need to improve the telephone etiquette skills" vs "you are not good at telephone etiquette"; "when you don't maintain eye contact when talking to the customer, you may give the impression that you are not listening fully, your attention is distracted somewhere else, and the customer does not feel acknowledged" vs "you are bad at listening to the client");
- ➢ when giving personal feedback, one way of phrasing has always worked for me: **"when you (action/ behavior) … I feel (emotion)… because (reason)…"**. And it's powerful because no one can tell you how you should feel or not feel, they can only adjust their actions to change that.
  - *"When you roll your eyes when I am telling you to smile more, it makes me feel unimportant and dismissed, because I intend to help you, based on observation."*;
  - *"When you are late 3 days in a row without a real reason, I feel disrespected and frustrated, because I need to cover for you and be late with my duties"*;

- *"When you fail to report an incident with a customer, I feel insecure and unprepared, because I am not aware of important situations in our company";*

➢ **ask questions:**

- What do you think about what I just told you?
- What ways to improve this can you see?
- What is the reality from your perspective?
- What can I do to better support you?

To summarize, the steps for a great performance review and feedback system in small, and medium companies and startups, are:

- learn and practice how to correctly offer and receive feedback (the resources are numerous) and make sure other leaders in your team know as well;
- set and share expectations;
- get well prepared with data, evidence, examples, remarks and a structure for the discussion;
- address poor performance and excellent performance immediately;
- schedule to have at least 1 meeting (30 minutes) with each employee every month (if more than 5 employees could be every 2 months or delegating some of the team members to another leader.);
- carefully choosing the phrasing of your feedback and listen and involve the employee in the solution;
- create an action plan (1 or 2 actions are enough for a monthly meeting, they must be very specific, short-term actions "calling each new customer after the first visit and address 3 satisfaction checking questions", that contribute to a longer term objective "improving first-time customers satisfactions score from 3 to 4, resulting in repeat visits");
- use an overall encouraging tone and send the message of valuable time spent together rather than judgment meetings.

If after offering 2-3 chances to improve, an employee makes no progress for significant performance (given the context is right and they have all the necessary tools and support), it's only fair for everyone to make a visible change, from changing the role to even terminating the contract.

I am a dedicated believer in giving chances to improve, **learning from mistakes,** and understanding employees' work and personal struggles, even more so in a small team. Sometimes however, there are team members who do not want to grow, do not accept any form of learning or feedback, resist change, persist in making mistakes, and unbalance the team dynamics.

This triggers another process you should be prepared for, **disciplinary actions and employee relations** (more details in the specific chapter). But as far as the performance review and feedback go,

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**is extending the service of an uncommitted, always difficult, and toxic employee, who is also a good performer, a worthy decision?**

My experience says NO to this because I would much rather deal with developing a new joiner, with a great attitude, and improving their performance in an elegant and fun way than dealing with individual and team negativity, lengthy, unproductive frustrations-sharing discussions, passive-aggressive behaviors, lack of interest and the cost of recovery from repeated mistakes.

If we want to take care of our employees and create a work experience, not only a work space, protecting them from toxic performers (at any level of career they may be, using well-adjusted techniques) is one of the basic actions, in my opinion. But the decision stays with you in this chapter.

# Employee Engagement and Recognition

No matter how much we want to simplify this process, if it's founded on the wrong core, it contradicts the idea of employee experience. So, to understand how to engage and recognize the employees with a real impact, we need to ask them directly how they feel and how they perceive appreciation.

## Does that mean that all their ideas and demands will be implemented?

No, it's impossible, but some will, others will partially, and others will later be enacted in different forms, but giving the chance to be involved in the company's future and well-being, it's more important than having an Employee of the Month award that no one asked for.

You can invest in a consultancy company to asses this for you, or self-learn the correct tools, formulate the right questions, and facilitate the approach, but without their valuable input, all you may implement could be received with a raised eyebrow.

In small and medium companies, assessing the engagement could be more challenging, when the teams are small and anonymity cannot be guaranteed. But it could also be an advantage in the fact that the relationships are stronger, people speak up more in smaller groups, and voicing their concerns is easily encouraged. And there are different ways to measure this precious indicator of your company's health and performance.

***What does an engaged employee look like and why is this state of mind so desired by the employers?***

- positive energy;
- passion about the job;
- loyalty to the company;
- willingness to put in extra effort (of creativity, innovation, understanding, etc.) to finalize the tasks at their maximum best;
- motivation, enthusiasm, commitment, involvement;
- building great relationships;
- being productive and proud of their work.

Did you experience this in your business or career, or had colleagues like this?

I had and I was one engaged employee and the feeling of going to work excited for the day is a time well spent in one's development and career advancement. Because when you are engaged you perform well, you shine, you are noticed, you learn more and faster, the results of your work are visible, and recognized, you get promoted, you build and contribute to something important, and you feel like you belong and the company thrives with you.

Why is it difficult then to have engaged employees? The number of variables impacting this is just too big to be easily controlled by the leaders. The higher the number of employees the more structured and organized the process but let me keep my promise and try to simplify it as much as possible.

**What are some of these variables (to name only a few)?**

I am choosing to describe them as questions to further inspire an Engagement Survey list that would suit small companies.

In a large business, this process is fairly handled by a third party (for obvious reasons of avoiding any tempering with the results and the administration), and if you have this opportunity, to purchase a third-party service, it's the best version of it. If not, there are a few rules for an in-house, self-made engagement survey.

You don't start blindly, anyway, even more, if you own a small/medium business, you already know, feel, and see what are the issues, the strong and weak points, the dynamics, and the relationships, the survey is a formalized way of centralizing all these as a start point for changes and improvements.

***So, resist the bias of avoiding the questions that would trigger uncomfortable, negative answers (in the end you want to know or confirm what are you dealing with), and:***

- ➢ ensure a variety of answers uniformly for all questions.
  - either a range of totally dissatisfied, dissatisfied, satisfied, totally satisfied for the questions starting with "How satisfied are you with the…";
  - disagree, disagree, agree, totally agree for statement-questions such as "I feel respected by my colleagues, I have enough career opportunities within the company", etc.),
- ➢ include open-ended questions with the option to write down ideas, suggestions, concerns:
  - "What would be some ways in which we can improve the learning process in this company?"
  - "How can we improve your work conditions, offer some personal suggestions!"
- ➢ ensure anonymity, otherwise the employees may feel reluctant to offering real feedback or express their worries.

We will group these indicators as follows (choosing the disagree-agree answer option):

**The need for respect and inclusion:**

- I am happy and motivated to work in this company.
- My feelings are acknowledged and respected by my colleagues and leaders.
- I am treated equally and fairly without the fear of discrimination and retaliation.
- I feel safe in my job and I trust my colleagues and leaders.
- The company changes are properly communicated and facilitated.
- Open question: what would make you feel more engaged when it comes to respect and inclusion?

**Leadership:**

- ➢ My leader treats me with respect.
- ➢ My leader clarifies what is expected from me in terms of tasks and behaviors.
- ➢ My leader offers me constructive feedback in a proper manner, regularly.
- ➢ My leader inspires me to do better every day.
- ➢ My leader helps me overcome obstacles.
- ➢ My leader listens to me and cares about me.
- ➢ Open Question: what could your leader improve for you to work better and enjoy your job?

**Work conditions:**

- I have the necessary tools to work productively. I feel physically safe in my workplace.
- I feel safe to share ideas or concerns.
- I feel this company has a strong culture, guided by values, mission, and vision.
- I feel anxious and stressed by the amount of work that I am handling.

- I feel pressured to reach unrealistic goals.
- Open Questions: How can we improve the work conditions for you to feel more valued?

**Teamwork:**

- ➢ The quantity of work is fairly divided between the team members.
- ➢ I feel valued for my contribution, to the team and the company.
- ➢ I feel supported by my colleagues to reach my goals.
- ➢ There is a healthy level of transparency and communication within the team and the company.
- ➢ The conflicts are handled professionally within the team.
- ➢ Open Question: How can we improve the team's performance to make you feel more engaged?

**Learning and Development:**

- I feel like I am continuously learning and developing within this company.
- There are enough career advancement opportunities within the company.
- My leader is having career discussions with me.
- The amount and relevance of the training programs are good for me.
- I feel involved in planning and choosing my type of learning (cross-training, cross-exposure, online training, new responsibilities, lateral transfers, etc.).
- Open Question: What suggestions do you have regarding the learning and developing opportunities in this company?

**Payment and Recognition:**

- ➢ I am fairly paid for the work that I do.
- ➢ I am fairly retributed for the contribution to the company's success.
- ➢ My work is recognized and valued beyond pay, by my leaders and my colleagues.
- ➢ Open Question: What benefits, rewards, ideas, and suggestions do you have when it comes to Pay and Recognition?

And, there is one more indicator, that cannot be evaluated with a survey, first of all because it is too personal, and secondly because it would be inconclusive: **the human personality.** I did experience, firsthand, situations when no matter how much a company offers, changes, improves on direct feedback and suggestions from an employee, adapts the benefits, or fulfills the needs and desires, someone will always be unhappy, disengaged, quiet quitting, demotivated, irrecoverably disconnected.

**Once accepted this reality, we can focus on solutions:**

- ➢ test the attitude and the potential for dissatisfaction when selecting a new team member, and make sure the context you are offering, as a leader, respects the engagement pillars (fair retribution, respect, and inclusion, involved leadership, good work conditions, etc.);
- ➢ have one to one to discuss on these pillars rather than asking them to fill in an impersonal survey;
- ➢ find the underlying cause (personal, family issues, unclear stress sources, difficult personalities, health problems, etc.);
- ➢ ask "what would make you happy" and discuss the applicability of that; personalize the action plans (reformulate the expectations, set improvements goals, define the consequences);

- ➢ offer support to find another job/employer if you cannot offer what makes the person happy within your company. You want to avoid the spreading of negativity, whispered frustration, and unnecessary sabotaging of the good work the other team members are doing.

**How to best administrate an engagement survey?**

After carefully formulating the questions and testing the survey functionality in the system, the best way to launch this would be through a meeting with the employees, or smaller meetings with various teams.

You want them to hear from you, that you created a survey, to better understand the level of their engagement, and need their commitment to respond, to analyze together the results, and to create improvement action plans.

You can even present the questions, clarify some of them if needed, and explain the next steps. Emphasize that the responses remain anonymous and that this is a chance to express suggestions, ideas, concerns, and issues.

Depending on the size of the team, you could allocate from 2 to 4 days for completion. Each employee would click the survey link when they are ready and comfortable to do it, select and write the answers, and submit.

In a week after the last day of completion, you could present the centralized results and together create actionable plans for the overall benefit.

This should not be a mandatory process, and the employees must know that, however, making sure they all understand the importance of their contribution, should be your priority.

When **communicating the results**, start by thanking the employees for their participation; make use of the technology offered by the survey platforms to create and share a visual analysis (charts, pies, recurrent words, percentages); present one by one what stands out, negatively or positively.

***Celebrate the great scores and thank the employees.***
***Summarize the weak points, and list them based on the severity or priority.***

Quote some of the detailed answers you collected through the open questions, discuss how applicable some suggestions or ideas are, and voice the concerns that were addressed. Make everything transparent and treat the answers with the utmost importance, no matter your degree of agreement with what was written.

**The Action Plans** must respect the same specificity principles, being:

**Clear | Measurable | Time framed | Realistic.**

***Take the top three, most common issues that came up, and start with those.***

If the week points are related to physical work conditions, the plans should be easy to make and implement (understanding that some of them require money): upgrade the printing machine, change the phones, change the light bulbs, analyze the work responsibilities for a better task allocation, etc.

Issues related to leadership, reveling lack of feedback and guidance, recognition, and appreciation would result in behavior improvement action plans, through organized feedback sessions, clear recognition programs, and the commitment to offering more verbal and public appreciation for the work well done.

There will always be concerns related to pay and recognitions, this is not a forced initiative to upgrade all salaries *(unless they fall below the market average for the positions you have in your company, that would be unfair treatment from the start and create a general dissatisfaction, blocking any benefic effects well-designed training plans and wellness activities may have).* Use this as an opportunity to brainstorm small to non-monetary solutions to improve the benefits list for your employees, including incentive plans, upsell, rewards and awards systems, milestones and achievements recognition, vouchers, etc.

The goals of improvement you made with the team must become very visible to everyone. And when, step by step, the plan turns into reality (you had the light bulbs replaced in the office, for example, a small step) you all celebrate together!

I hope by now I have presented you with a simplified structure of what engagement means, and how can it be measured and transformed by well-designed and followed-up action plans. This should become a yearly or semestrial process, with the mention that obvious issues must be handled immediately. Depending on the profile, size, and form of your business, the personalization of this structure can go as deep as necessary.

> **Is there an even more simplified form of engagement checking?**

**Yes, talk to your employees,** care about what they care for, ask how they feel regularly, what makes them happy or not, observe and address big emotions and mood changes, just connect with purpose, and this consistent practice alone, will make things better!

The same is confirmed by globally renowned companies, according to Gallup's Global Workplace 2023 Report:

> ***"Global employee engagement was 23% in 2022. And in Europe, only 13% of employees were engaged […]. In contrast, the average engagement level among the 57 organizations achieving the 2023 Gallup Exceptional Workplace Award (GEWA) is 72% -- more than three times the global average. What do these best-practice organizations do differently? […]. Some key themes […] include a relentless customer focus, a clear organizational purpose, employee ownership and empowerment, and keeping things simple."***

[Gallup. (February 16, 2024). Workplace. Retrieved from www.gallup.com/workplace/509072/engaged-organisations-emea-differently.aspx ]

## Recognition Programs

As a logical impactor of the overall engagement, defining and executing recognition programs adapted to your specific business is another great way to take care of the employees and create healthy competition and motivation levels.

I will exemplify below some that I find relevant and fitted for small and medium companies, involving limited resources and centered on non-monetary awards and benefits.

These programs represent only a part of the continuous efforts of celebrating success, they distinguish themselves by their well-defined (criteria, voting, rewarding points, etc.) and planned structure, compared to the spontaneous celebration of a positive review in social media or a big sell one of your employees made.

## The Employee Profile

If client-facing companies build customer profiles to better address their wishes and needs, respect dietary preferences, personalize the sales process, and create special birthday/achievements celebrating surprises and thoughtful gestures, **why not apply the same principles for the employees with the similar goal of creating experiences?**

- "Because we work closely together, we know already what we need to know about our colleagues!" *(do you, though?).*
- "Because those details are private, not all employees feel good about sharing them!" *(not all do but some really do, and also, many of those details are observable or shared involuntarily: favorite color, fruit, drink, snack, family status, birthdate, achievements, interests in movies, sports, books, strong points, expertise, etc.).*

There could be reasons not to do this (the time invested, the ethicality of it, the system used and the data privacy norms), but with all respect to these reasons, and based on voluntary participation, having an Employee Profile *(an enhanced and online form of the "employee file" that contains personally identifiable information anyway: working contract and benefits, contact details, identity documents, work procedures, and standards acknowledgments, warnings and notes, certificates and appreciation letters, transfers and promotions documents, CV and recruitment comments, etc.),* could increase the chances of a personalized work experience.

**What I would include in an employee profile if I had 2 employees and above:**

- **Personal details:** (name and preferred nickname, email address, home address, family status, including the name of the closest family members, emergency contact).
- **Special details:** cultural aspects (religion, grooming, practices, and norms, etc.), talents (spoken languages, drawing, singing, standup comedy, etc.), abilities (First-Aid and CPR certification, emergency response training, IT Savy, Excel Expert, etc.).
- **Food and Drink:** potential allergies, special food choices (vegan, vegetarian, fasting, dieting), favorite drinks, fruits, snacks, and cake.
- **Celebrations:** Work anniversaries, birthdays, kids' birthdays, seasonal holidays based on culture.
- **Interests and Hobbies:** favorite sports, books, films, music.
- **Awards and Mentions:** Nominations, Awards, Outstanding customer reviews, etc.
- **Work preferences:** on-site/remote/hybrid, preferred schedule, preferred communication methods, offering and receiving feedback preferences, career aspirations, learning interests, etc.

### How do I collect all these details?

One way would be through a Preferences Poll/Survey (you've guessed by now how much I like surveys and centralized results), during Onboarding or anytime you consider, with a yearly refresh to include changes or a thorough monthly update.

Some details could be collected through observation, questions, interactions, and connections.

Others can be revealed in team-building and get-to-know-each other exercises.

### How do I best store the details?

First, make sure to understand and respect all the rules regarding data privacy and security, you could start with a simple Excel with multiple sheets based on employee numbers and move on to a centralized employee software when the team is growing.

### How can I use these details to create experiences?

Through personalized approaches and gestures that would play a crucial part in building and maintaining the engagement:

➢ Imagine if you could offer, for one employee's birthday, instead or on top of a generic birthday card, impersonally signed by the colleagues and an out-of-tune Happy Birthday group song (that is fun most times): a small gathering, with their (latest) favorite song on the background, around a small white chocolate cake (their favorite), and a tricky candle that lights up again (because they are funny that way!) and a public message from someone dear they cannot be with for their birthday and …(oh, I can go so far!).

➢ Imagine the power of a simple:
  - *"Today your son started nursery, right? How are you feeling?"*
  - *"I saw this vegan snack yesterday in the supermarket and thought of you! Enjoy!"*
  - *"It was my turn to bring in coffee this morning, here is your soy-latte, your plain americano, your cappuccino, and a green tea for you, not a coffee fan, I know!".*

From these, one could say, small actions, you can easily move on to bigger, personalized plans around learning, career opportunities, feedback, and work-handling decisions *(for a parent, the flexibility to pick up their kids from school, around work schedule, without having to plot intricated schemes of coordination, could be a huge motivation booster; for a non-morning person, if their job is not impacted by this timeframe, offering office arrival hour flexibility could be appreciated, for a proactive learner, offering multiple and various ways of learning, could bring up empowerment and appreciation, etc.)*

The project I briefly described above, is an optional one, others may be the priorities for your time and energy investment.

Or, you may say that it should not be necessary to fill in Excels and create surveys, because, in a small company, these aspects are observed and remembered naturally and the personalized actions come as default, ***"after all, we work closely together, we should know each other's preferences!".***

***And if that is the reality, I can only congratulate you for the very, very powerful skill you possess!***

On the same logic, all concepts and practices in this guide can also happen in a natural, obvious, and spontaneous way *(wanting to satisfy the customers so they return, taking care of the employees, using a positive tone in interactions, smiling to welcome a client, saying thank you and goodbye, being respectful and polite)*, **BUT DO THEY, THOUGH?** Are these actions taking place automatically without structure, continuous learning, reinforcement, and celebration?

Moving on to a classical one,

**The Employee of the Month/Quarter**– the source of eye-rolling, controversy, perceived unfairness, collegial jealousy, and short-term demotivation, or an amazing way to fortify great behaviors and recognize achievements. The difference between the two perspectives comes from clearly and transparently outlining, explaining, and coordinating the process.

As a recognition tool in itself, it may be outdated, too complicated, or need a tailored version to echo the wishes and needs of your unique employees or be suitable to companies with 15+ employees and multiple departments. Start with these questions and sketch the general lines of your system:

- ➢ What behaviors and performance levels do you want to recognize and consolidate? Are they aligned with your company culture, customer-centric, or talent and general performance-driven?
- ➢ Have you involved the employees in creating this award and its criteria?
- ➢ How do you define outstanding, excellent, and exceeding, based on previously unraveled expectations?
- ➢ How will you select or differentiate between two or three great employees?
- ➢ Who will choose the winner, is everyone voting, will it be a committee to decide, or you, as a leader, have the final word?
- ➢ How and when will the award be presented, what is the material value (money, vouchers, benefits), who will take care of the coordination and details? What company-themed titles will you choose (Sales Superstar of the Month, Customer Whisperer of the Month, Captain Outstanding, etc.) to make it more adapted to your culture?

It's important to mention here, that **WE NEED TO BE CAREFUL WHAT BEHAVIORS WE RECOGNIZE** to send the right message:

- ***often working extra hours;***
- ***volunteering for everything;***
- ***never taking sick leave;***
- ***working on their days off;***
- ***bring their laptop along, in vacation;***

…these behaviors could, at first sight, describe a very engaged employee, but for me, it screams traumatized, stressed and anxious employee.

Isolated, project-based extra hours and volunteering for additional responsibilities with the right retribution? Yes, let's appreciate and encourage that, but do you see the difference?

It does take effort to recognize and celebrate the employees, that's why it's easy to fall short in this chapter, same reasons apply: limited resources in small and medium businesses. If the two examples above still seem complicated processes that do not match your company's environment, adopt some minimalistic ones:

**Birthday Recognition | Work Anniversary | Company Milestones | Seasonal Celebrations**_– these also require advanced planning, thoughtful gestures, and a generous amount of care. The more details you have about your employees the more special the celebration, and I did add examples when talking about the employee profile.

**The lesson here is to find a setup that works for you and your team!**

…a system that would avoid being taken by surprise and having to improvise a superficial ceremony *(and I am sure this happened to most of us, to forget one colleague's birthday or anniversary, even more so as their leader and each time, while tormenting in embarrassment, we promise to ourselves to do better next year; and how many times can I use the excuse "I am not good with remembering birthdays or offering gifts, not my strong point!", well, let's plan and organize it then).*

What would a birthday festivity include, aligned for all employees but with small preference-based influences:

- the cake (because it's not just any cake, it's their favorite sweet);
- a break during the day to wish happy birthday;
- the card with wishes from all the colleagues (because is not just a card, everyone does their best to write something personal);
- a small gift *(a few hours off, money, vouchers, products, flowers – I would always choose money, it's freedom for who offers and who receives, but that is just me and the awkwardness blinding me when I need to search for gifts).*

Is the company funding this or there is a common birthday fund to which all colleagues contribute on a rotation basis? Who is responsible for organizing all the details? What is the system: 1 week before reminder + birthday reminder, list of birthdays of the month, one gathering per month to celebrate all?

Keeping a record of work anniversaries and acknowledging them could be another minimalistic form of recognition, rewarding loyalty, engagement, and collected experience.

You could choose to highlight important milestones like 1 year, 5 years, or 10 years with maybe an anniversary badge, celebration, or a gift, and mark all the other anniversaries with heartfelt congratulations and public recognition.

The personalization variables are, again, innumerable, and my goal here is not to describe comprehensive recognition processes but to stress on doing it, finding what works for you and your employees, asking them what they would want, and doing it.

> ***Overlooking these minimal appreciations counts for missed opportunities to connect and engage.***

## Rewards and Incentives

Determined by the type of your business, incentivizing the employees to do their best is another form of generating engagement, with mutual benefits. Rewarding individual and company achievements such as upsell, cross-sell, new client acquisition, positive customer reviews, revenue targets exceeded, improved online scores, and many more business-sector-based indicators.

The crucial aspect is to either self-educate and involve the team in creating what works for you or ask the support of external experts to understand your environment and suggest adequate rewards and incentive plans for you. You must also be willing to compensate the efforts of the team members and admit that a sincere ***"Thank you!"*** may not be enough in this context.

Let's take a simple example of how you and your team can create an incentive system:

Select a measurable, revenue or reputation-generating goal:

**1. Increase the number of online reviews from customers;**

Clarify the goal and make it actionable:

- ✓ The target is to grow from 5 to 10 reviews per month.
- ✓ Each employee should encourage the customers to write a review online, mentioning their name (associated with positive reviews, of course), by inviting them to scan a QR code (*this stimulates the employee to provide great service and connect with the customer, attracting a positive review).*
- ✓ At the end of the month, analyzing the online reviews, if the target is met everyone wins and the employee whose name gets the most mentions additionally wins.
- ✓ What is the win? (and the answer: experience, being a good team member, and appreciation cannot work indefinitely) You could think of small, transparent monetary or product-based incentives: 2$ per name mentioned, offered monthly + 5$ more for the winner of the month.

**2. Increase the monthly sales through the upsell of a certain item;**

Clarify the goal and make it actionable:

- ✓ Up-selling the new vegan chocolate bagel at, a 20% discount, with a target of 20 per day;
- ✓ Each front-line employee should offer and present it to the customers;
- ✓ The name of the server/cashier/barista who made the upsell will be added to the transaction (hopefully your system allows it);
- ✓ Did the team sell 20 that day? I Who sold the most? I Should you make it a monthly targeted system?
- ✓ What is the win?

***The creativity level when designing rewards and incentives for the team can go as far as possible, even more when involving the team in building it.***

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Other employee engagement-generating activities could be:

- yearly teambuilding or team-outings;
- wellness activities;
- team challenges *(again created by the employees based on their preferences, any other types that would seem forced, un-asked for);*
- community volunteering mini-campaigns, and professional development workshops.

I left this at the end because it could be a summary of all things done right in one reassuring behavior:

> an underappreciated
> form of engagement is
> **EMPOWERMENT.**

**What could be more engaging** than having your leader's and team's trust and support to: make decisions, solve problems independently, be creative, and be in control of your responsibilities?

And **what could be more alienating** than:

- ➢ always being told what to do *(even when you reach the independent professional stage of development);*
- ➢ micromanaged;
- ➢ having all decisions questioned;
- ➢ being asked to perform a task a certain way when you see a faster, better path to reach same or better results;
- ➢ being monitored, undermined, pushed for unrealistic deadlines;
- ➢ being surprised by last minute changes and uncommunicated procedure updates;
- ➢ not having access to information;
- ➢ not being consulted as an expert in company-level decision;
- ➢ and the most alienating of all, being afraid to take risks, speak up or share ideas.

Yes, you will say, ***but not all employees can be empowered***, and I agree with you, to some extent, other employees don't want to be empowered, they work better under a directive style.

But most employees can and want to be empowered, and it depends on you to discover who, how much, when, and how, but not doing it at all, again, counts as a missed chance to see amazing achievements based on trust.

I had to develop quite a few employees in my career, from directly reporting team members to numerous trainees in the department.

As a big fan of "learning by doing", when a student trainee has reached the minimum comfortable stage of handling their tasks, I would propose exposure to the most exciting parts: after a few weeks of onboarding and administrative task. I would invite the HR intern to attend and observe recruitment interviews with me.

Next time I would ask if they want to prepare and address questions and collect the answers, soon after and based on the performance I would suggest they facilitate the entire interview of a new-entry role with me observing. Then, proving good performance, assign pre-screening interviews without supervision and trusting their documented selection.

I would apply the same gradual principle in other processes too: training preparation and delivery, events planning and organizing, etc. This has always worked for me, at all levels, because the energy coming from being empowered and trusted with important tasks, would help finalize the small, administrative, and maybe boring ones.

> **Employee Engagement**
> **is the CORE of the**
> **Employee Experience Approach.**

It requires effort, discipline, consistency, involvement, and caring, but what great experiences in this life can be achieved with less than this?

# Employee Relations – Disciplinary Actions and Conflict Management

A very interesting part of the Employee Experience is the way the company or the leader is handling the employee relations, their reaction, knowledge, and clarity when it comes to:

- employees' conflicts
- underperformance
- inadequate relationships in the workplace
- unethical, illegal, and immoral behaviors
- discrimination
- disciplinary actions

As much as anyone would want to avoid dealing with these, they do happen and it's indispensable to know how to handle them. The variety of issues that can arise in a workplace is simply impossible to grasp, depending on the size and field of the company, the country or the culture, and many more variables one could oversee.

I would like to draw some general lines that could guide small and medium companies on how to better approach this aspect of their reality.

Setting expectations from the beginning - establishing unambiguous guidelines about what is and what is not tolerated at work and what are the steps to take when something unacceptable is happening.

**These guidelines may include:**

- grooming standards;
- professional conduct expectations;
- standards of performance;
- list of illegal, immoral, unethical actions *(theft, misconduct, breach of confidentiality, any form of harassment, violating policies, substance abuse, retaliation).*

***There is no need to reinvent the wheel or be creative***, these guidelines already exist and most of them are universal, turning them into a coordinated process in your company may require good documentation and the support of an external/legal consultant because at some levels it interferes with legal aspects depending on the country.

Let's take one mild and one somewhat severe case as examples of reactions and treatment and then extract the learnings.

1. ***(mild)* You notice one of your employees is late, two times this week – one of their responsibilities on a rotation basis is to open the shop based on the public schedule.**

   - ➢ The logical step to take is to approach the person, in private, ask what is happening and actively listen to the answer;
   - ➢ The reasons for being late may range from personality traits (not a morning person) to personal problems or changes that are no longer compatible with the work schedule (changed accommodation, car broke down, taking kids to school), to disengagement and demotivation (employee does not feel valued thus does not care to be punctual),
   - ➢ Your role is to understand and take action, preferably together with the employee;

- ➢ Reinforce the importance of being punctual and the impact on operations *(if the employee is not punctual to open the shop when he is on the morning shift, side jobs are not done in time, customers leave or are dissatisfied, colleagues are frustrated, etc.);*
- ➢ You offer solutions: temporarily change the shift until the personal situation improves, look for the cause of demotivation work on changing the state, etc;
- ➢ You offer clear timeframes to allow the attendance issue to be resolved and explain the consequences if not or apply a permanent solution to avoid lack of punctuality;
- ➢ If after all steps are taken (different shifts and days allocation, flexibility and understanding, etc.) the problem persists, you may have to start a disciplinary action, and have a written note to the file that would be the ground for more severe actions or even cause for role change or dismissal, but let's be confident in the leader's capacity to find the best solution before reaching a dismissal step;
- ➢ Another crucial aspect, even more so in small and medium companies is ensuring a designated, confidential, and secure channel an employee can use to report possible workplace conflicts or misconducts. This encourages communications, triggers early conflict resolution without a high impact on team dynamics, productivity, and morale, reduces the consequences, and maintains trust.

2. ***(somewhat severe)* You receive the information that one of the employees may be performing fraudulent actions, using their loyalty card to collect points on behalf of customers who do not have a card.**
   - ➢ You appreciate the sincerity of those who brought this to your attention and reinforce the importance of confidentiality;
   - ➢ The first step is to follow this alleged accusation with careful observation, internal system loyalty points check, ask other employees, in confidence, what is their opinion about an action like this, how would it be possible, and even obtain statements;
   - ➢ After collecting the facts, that may or may not lead in the direction of the accusation, you will have to approach the employee;
   - ➢ If your findings give you enough reason to believe the accusations are real, you can suspend the employee's activity immediately, pending the investigation (following a written process and respecting the law in terms of maximum days of suspension and retribution, for example);
   - ➢ It's important to have a witness when discussing, maybe a supervisor, or someone from the HR department if the company has one;
   - ➢ The discussion should start with explaining the reason (alleged fraudulent action) and continue with stating the findings and asking for the employee's side of the story. It ends with reinforcing the confidentiality of the discussion and reassurance that this will be, for its entirety, a fair and respectful process and that you will let the employee know the next steps soon;
   - ➢ The final decision depends on:
     - the severity of the fact;
     - the level of abuse of the system;
     - very much on the reaction of the employee during the discussion *(if they are cooperative, admitting and repenting or defensive, aggressive, lying, and blaming);*
     - the evidence and statements collected (could be that you don't have enough);
     - the reputation and performance of the employee.

➢ In this case, it could be a written warning with the mention of direct dismissal if any other, even rumor, of this kind of activity, would be associated with them in the future; a note on the file, a role change proposal, or direct dismissal.

Now, to extract the insights, I would say that for all employee relations situations, there are principles that apply widely, regardless of the severity:

- ✓ **employees must be treated fairly and with respect** *(they will be guilty only when proven by facts, they deserve a thorough investigation, they have the right to defend themselves, to understand the process, to be addressed with respect);*
- ✓ there must be consistency in taking the same steps despite of the level of seniority, career level or influence;
- ✓ the accent should be on taking care of the employees by understanding the cause of misbehavior;
- ✓ offer solutions, find middle ground *(where is possible, of course, if proven guilty for stealing, the only "middle" ground is termination, even if they stole 1 or 1000$);*
- ✓ respecting the legal rights, confidentiality and integrity of the employee;
- ✓ involving a firm and serious tone when handling mild of severe cases, none of the discussions should include sarcasm, making fun of the situation or involve lack of seriousness.

There are books written on this very own topic, my purpose is to highlight the importance of having clear guidelines about employee relations, even within small and medium companies, this will save a lot of energy dealing with whatever comes from this direction (and they will come) taking care of the employees in the same time.

## Separation and Offboarding

Many times, unfortunately, the process of separation, in small and medium businesses is overlooked, and its importance is minimized by both parties, but the responsibility belongs to the employer to coordinate this procedure.

Here are some necessary aspects of separation, regardless of the reason (termination, resignation, mutual agreement, probation, end of assignment/internship, etc.):

- ➢ **clear and timely communication** (reasons, next steps, timeframes), legal compliance, and exit paperwork (due payments, required documents, clearance, and company property, etc.). So far, I hope these two important parts are handled in all possible sizes and types of companies. To stick to the purpose of creating an Employee Separation Experience, we could add the following to the mandatory ones above:
- ➢ **support and guidance**: career guidance, outplacement options, referrals for other employers; Farewell and appreciation: celebrating the next step of your former employee, organize a farewell gathering to share thanks and appreciation, offer gifts and gratitude, and wish good luck with the new opportunity;
- ➢ **exit interview**: the chance to look for improvement opportunities, manage company's reputation (by handling all separations with integrity, respect, and fairness) and obtain sincere feedback on many aspects of your work environment; offer, proactively, documents the employee may need in the future: a generic or personalized recommendation letter, a service certificate, an original or copy of all training certifications, letters of appreciation, nominations, and awards, etc.

I did, unfortunately, see this process handled badly by one or both parts, having unnecessary repercussions, therefore extending the care for the employees even when collaboration comes to an end, is a great proof of healthy culture and character.

Some of the **less verbalized emotions around a separation process**, that can sometimes undermine a respectful manifestation of it, are:

**FROM THE EMPLOYER:**

- the relief of having a negative, toxic performer, or a "demotivated beyond recovery" employee leave;
- the frustration of having to work extra and pressure the team to cover the absence, spend time and effort to recruit and train someone new;
- the sadness and pride of seeing a great employee getting promoted in another company because you could not offer more;
- the sense of betrayal and inutility of handling a "respectful" separation when the employee stole from you;
- the regret of not having done more to motivate and keep a good employee;
- the fear of retaliation and badmouthing of a disloyal employee damaging the brand reputation.

**FROM THE EMPLOYEE:**

- the disappointment that they were not asked or offered more (money, benefits, promotion) to stay;
- the relief of not having to go back to that toxic colleague or boss;
- the fear of what's next; the excitement for what's next;
- the sadness of not seeing some amazing people every day;
- the anger coming from being mistreated, promised but not delivered, mislead, overworked and never appreciated;
- the frustration with themselves because they offered too much when received so little.

As long as both parties, acknowledge their feeling but decide to cope with them professionally (yes, much easier said than done), they can move on with mutual respect and consideration, parting on good terms.

Adopting a long-term way of thinking and accepting that…

> **…the world is so small that, one day, directly or indirectly, both may need to interact, collaborate, and even work with each other again.**

My experience so far has proven that the chances for this to happen are so high that we really should think twice about how we close all chapters in our lives, not only at work.

I love to close circles ***(and to write details in brackets that make it difficult sometimes to remember how the paragraph actually began)*** so it's time to summarize the concept of Serving the Employees.

Above all the examples I shared in this first part of the guide, I want to reinforce the main idea:

> ***if the basis of all your business endeavors is built on observable sincere care and respect for your employees, you don't need complicated processes, corporate language, and expensive yearly parties to compensate for anything, your team will thrive.***

But as you evolve and your business grows, you may be inspired by some ideas, to create your own inclusive culture, empower the team, or celebrate success in sophisticated ways. Good luck!

# Serving the Customers

*"See all without looking; hear all without listening; be attentive without being servile; anticipate without being presumptuous. [...]"*

What a timeless and authentic description of the essential luxury service behaviors, so simple but all-inclusive at the same time! *From the code of César Ritz, a Swiss hotelier, who started his career in the 1870s and became the founder of several hotels, forerunners of the modern Ritz-Carlton Hotel Company. [Wikipedia. (February 20, 2024). César Ritz. Retrieved from en.wikipedia.org/wiki/César_Ritz].*

This inspires me to believe, against many contradicting realities, that there should be more to an employee-customer interaction than a transactional exchange of goods or services and payment. I am aware that very few small businesses, startups, or freelancers have the knowledge, time, or money to invest in a "ritzy" philosophy of treating their customers.

But maybe, by demystifying this "out-of-reach", "from the movies", "sophisticated" aura of the luxury serving behaviors and translating them into free, simple, accessible, practical: gestures, mimics, tones and words, we could build customer-focused mentalities and see the way to better service, happier customers, thriving business and rewarded employees.

## The 3V

Authentic interactions are based on emotional connection. The more we know about our capacity to communicate, the better we can use it, in our favor, thus becoming "in control" of our reactions. And I confidently believe that we can learn anything, even elements that may be described as "either you have it or you don't", like empathy, common sense, and genuine care.

Let's start with understanding the influence of non-verbal communication, the messages we transmit, often without our intention and without saying a word! I found this theory very useful and had the chance to practice and observe it throughout countless dialogues.

When serving a customer, face to face, we cannot leave reactions dynamic to chance.

> ***"When a person communicates feelings, the three elements of the message - words, tone of voice, and facial expression - contribute differently to how much others like the person. Specifically, words account for 7%, tone of voice for 38% and facial expression for 55% of the liking. For effective communication about emotions, these three parts of the message need to align or be "congruent." If there is any incongruence, where the verbal and non-verbal cues contradict each other, the receiver might be confused or irritated by the conflicting messages."***

A theory of Albert Mehrabian (born 1939) is Professor Emeritus of Psychology at the University of California, Los Angeles [...] best known for his publications on the relative importance of verbal and nonverbal messages. - [Wikipedia. (February 20, 2024). Albert Mehrabian. Retrieved from en.wikipedia.org/wiki/Albert_Mehrabian]

And in customer-facing businesses it’s all about being liked, this makes the customers come back because they like your product, they like the place, and even more, they like how you make them feel, they like interacting with you, they like you! I cannot find a simpler way to describe this relationship.

The 3V Model of Communication focuses on these three elements and their effect on face-to-face interactions.

**Visual (55%)**: including body language, posture, facial expressions, gestures, hairstyle, accessories, grooming, and overall physical appearance.

**Vocal (38%)**: referring to the tone of voice, pitch, pace, rhythm, intonation, and other vocal elements.

**Verbal (7%)**: involving the actual words used in the communication: the vocabulary, the word association, the accuracy of information.

Applying this to an employee-customer, direct communication, we can find numerous points that are in our control, if we learn how to pay attention and purposefully utilize them. And, I want to be clear, this is not about learning elaborate sales techniques, NLP (Neuro-Linguistic Programming), or manipulative negotiation techniques, it's about ***connecting with your customer at a basic but genuine level***. And in the business of customer service, the employee is considered ”on stage”, fully exposed, from near or far, everything can and will be judged as part of the experience.

### Visual (55%)

From a distance *(the entrance of a shop, the lobby of the hotel, the reception area of a private clinic, etc.)* the visual aspects of your behavior can carry important messages for the customer:

- posture (whether confident, alert, or disinterested), orientation towards the customer (welcoming or facing away from the entrance);
- eye contact, and the silent hello;
- the nodded acknowledgment during queuing;

Getting closer, the customer will see more details:

- a welcoming smile;
- engaged body language;
- genuine presence;
- overall grooming, and accessories.

During the interaction, the visual aspect includes:

- momentarily pausing other tasks, like arranging items, cleaning tables, or typing on the computer, to fully focus on the customer;
- maintaining eye contact and a warm smile;
- nodding to convey active listening;

- mirroring the customer's intensity (engagement, timeliness, importance);
- using two hands to hand the purchase;
- stepping out from behind the desk to guide the customer;
- showing directions using the palm instead of pointing;
- professional reactions to complaints, etc.

In reality, only a few of us, and after years of practice, can genuinely be mindful of the multitude of nonverbal signals we constantly emit and effectively use them to enhance interactions.

Without a deliberate focus on understanding the Visual aspect through training, roleplays, and feedback, unintentionally, we might create an atmosphere where the customer feels unwelcome or undervalued, missing the chance to create a true connection.

This is precisely why big customer-centered companies don't let this "happen naturally", instead create ideal candidates' profiles, standards, procedures, audits, and rewards.

## What about small companies and independent business owners?

Here is, an antagonizing mirror of some "naturally happening" behaviors, and the potential consequences on customer's perception, coming from the unintentional messages they send.

| **Visual Element of the employee's behavior** | **Non-Verbal message Customer's Feeling** | **Better Version** |
|---|---|---|
| Frown or neutral expression | Message: Disengaged, bored, disinterested<br>Feeling: Undervalued | Smile |
| Look away / Stare at the customer | Message: Busyness, lack of interest/ disrespect, intrusiveness<br>Feeling: Overlooked, unrecognized | Make appropriate eye contact, Maintain an engaging expression |
| Wait for the customer to come to them / approach them | Message: Passiveness, laziness<br>Feeling: Neglected, unwelcomed | Take a step forward into the interaction; Proactively approach guests whenever possible |
| Try to do two things at one time | Message: Low interest, customer is second priority<br>Feeling: less important, underappreciated | Keep the focus on the customer |
| Try to rush the guest | Message: Having more important things to do<br>Feeling: frustrated, dissatisfied, stressed | Maintain an appropriate pace throughout the interaction |
| Slouch, lean on something | Message: Bored, does not want to be there or bothered<br>Feeling: disappointed, unimportant | Maintain alert posture, with no hands in pockets or folded arms |
| Hands in pockets | Message: Not open to communication<br>Feeling: limited, discomfort, distrust, disrespect | Hands-on the side, Hands clasped at the waist or behind the back |
| Maintain a lazy posture | Message: Not ready to engage<br>Feeling: frustration, discomfort, disappointment | Stand up straight |

| | | |
|---|---|---|
| Arms folded across chest | Message: Superior, stiff, inflexible<br>Feeling: limited, unwelcomed, discouraged | Arms uncrossed and open |
| Act like the request is a problem | Feeling: The guild of creating issues for the employee, the disappointment of creating a problem by having a request | Demonstrate an optimistic attitude for each request |
| Point your fingers when you are giving directions | Message: Rudeness, clumsy, inelegant<br>Feeling: too abrasive, almost aggressive | Showing direction or at something with an open palm |
| Moving too slow | Message: Lack of interest, unappreciative of customer's time, lack of special awareness and observation<br>Feeling: frustration, impatience, irritation | Understand and match customer's level of urgency |

### Vocal (38%)

Also known as paralanguage, this behavioral component in service includes several crucial elements.

**The tone** of one's voice plays a pivotal role, varying from sounding bored or bothered to radiating enthusiasm and genuine warmth. In a phone-based customer interaction, it takes also the value of all the visual aspects that are missing, counting for the biggest impact on the conversation.

The tone can be perceived as helpful, warm, caring, concerned, engaging or rude, disrespectful, superior, scolding, or blaming, it's amazing how revealing the tone of voice can be. **Are we always mindful of the value of our tone** or do we only realize it soon after we also hear it? Do we intentionally select a tone or just speak and see what happens? Although rhetorical, the answer to this question represents the difference between a subjective employee and a service professional.

**The accent**, while unique, should not impair clear understanding, it's all about putting energy into reducing the customer's effort of understanding by replacing the challenging words, speaking rarely and clearly.

**The right pace** when it comes to speed of speaking can convey confidence, professionalism, and maturity, speaking too slow could mean boredom, hesitation, lack of knowledge, disinterest even being condescended, and speaking too fast could signify rushing the customer, being nervous, being irritated.

And here comes **the pitch, the intonation, and the rhythm**, they also have some meaning to add to your communication, from being monotone and disengaged to being attentive and involved. And if, while reading this you feel like you may be preparing to run the election rather than interacting with a customer, you are not very far from the truth, because the details we pay attention to when talking about customer service, also include these very important particularities of our communication.

### How do we become aware of extremes in our vocals?

- ➢ We can, sometimes, hear ourselves speaking, we can ask for feedback, we can record and listen to ourselves speaking *(I know, no one who is not a singer or a radio DJ, likes their recorded voice, they always sound so different, well that is how others hear it.).*
- ➢ While some of us possess a natural charisma and effortlessly incorporate these elements, for the majority, it involves a conscious and mindful process with every customer interaction.
- ➢ Being alert to the nuances of nonverbal and vocal communication becomes a deliberate practice, ensuring a positive and impactful engagement for both customers and service professionals.

### Verbal (7%)

The low percentage assigned to this element has created controversy.

***How is it that words, carefully chosen to address the customer, have such a small impact overall?***

Try this: go on the review website of your choice, find your favorite place to go out to, and read through the comments, the number of reviews where customers were disappointed or impressed by the words used by the service professionals is very limited.

On the other side, the rudeness of the tone, the politeness of the behavior, the great attitude, or the disrespectful treatment could have the highest rate of recurrence. We often attribute excessive power or relay on industry-standard, robotic phrases and scripts that lack authenticity and support. The true influential force in our communication lies in the visual and vocal elements.

This component involves more than just the words chosen. It extends to the intricacies of the language used and it encompasses:

- an adept vocabulary, avoiding unnecessary business jargon that may require translation for the customer;
- fluency in multiple languages broadens our ability to connect;
- cultural sensitivity, as certain words may carry varying connotations across cultures.

A nuanced selection of words becomes crucial, particularly when navigating difficult conversations, expressing empathy, or constructing persuasive arguments in an upsell scenario. In essence, the verbal component, despite its modest percentage, holds significant weight when approached with attention to detail and a keen understanding of its nuances, supported by carefully selected words and curated vocabulary to reflect the level of business.

### Here are some options to refine the language, and the category they represent.

Customers do not have to automatically understand your **JARGON**, as professionals we must translate it for them. Also, the friendly, colloquial word, **SLANG**, may not be appreciated by all customers or fitted for many work environments, choosing them correctly would differentiate you. The **NEGATIVELY** perceived words can easily be replaced to maintain the hope of positivity even in delicate situations.

| Category | Basic version | Better version |
|---|---|---|
| Jargon | MOD | Manager on Duty |
| Jargon | POS | Our system |
| Jargon | 24/7 | At any time |
| Jargon | BOGO | Buy One Get One Free |
| Jargon | OOS | Unfortunately, this product is out of stock, allow me to suggest… |
| Jargon | ROI | Return of investment |
| Jargon | Do you need a backorder? | Unfortunately, this product is not in stock, may I offer to reserve it for further delivery when it becomes available? |
| Jargon | You can find it in the Endcap! | You can find it at the end of this aisle, where the promotional items are displayed! Allow me to take you there! |
| Slang | Anything else? | Is there anything further I may assist you with? |
| Slang | Bye bye! | Thank you for staying/dining with us. We hope to see you again soon |
| Slang | Coming through! | Excuse me/ Pardon me! |
| Slang | What? | Could you repeat that, please? |
| Slang | Five for dinner? | Thank you for joining us, how many are joining you this evening? |
| Slang | Folks, people, guys/gals | Ladies, Gentlemen, Sir, Madam |
| Slang | Got it! | I understand! |
| Slang | Hang on a minute! | May I answer the phone? |
| Slang | Have a fab day! | Have a pleasant day/ evening! |
| Slang | Hey! | Hello! |
| Slang | Hold, please! | May I please place you on hold? |
| Slang | Mornin' | Good morning! |
| Slang | Nah/Nope | No |
| Slang | Need help? | May I help you? |
| Slang | OK11 | Right away, Certainly, Excellent choice! |
| Slang | See ya | Enjoy the travels! |
| Slang | See ya later! | Goodbye / Have a restful evening! |

| | | |
|---|---|---|
| Slang | Sorry/My bad | I apologize/ Please forgive me! |
| Slang | Sure will! | I am happy to… |
| Slang | Thanks! | Thank you! |
| Slang | Uh/Um… | One moment/ Let me check for you! |
| Slang | What's up? | Good morning/ afternoon/ evening! |
| Slang | Yeah/Yup | Yes/ Certainly/ Absolutely! |
| Slang | Do you want it now? | Is this a good time? |
| Negative | No problem! | You are very welcome! My Pleasure! Of course! |
| Negative | I don't know! | Allow me to find out! |
| Negative | No, we can't! | I can offer/suggest… |
| Negative | That's not my job! | I would be happy to find someone who can help! |
| Negative | I can't right now! | If I have that to you in 30 minutes, will that meet your needs? |
| Negative | What is the Problem? | Tell me more about what happened. What is the situation? |
| Negative | We don't have that! | We have something similar, let me suggest… |
| Negative | We don't do that! | Would you like this option that we have available? |
| Negative | Criticize the guest's choice or the product/service selected | Compliment the guest's choice when appropriate |

The 3V is not only a start-point in the preparation for better communication and improved service but also a very necessary step on your journey to successful business. A simple awareness check can make the difference between automatic reactions and default behaviors and a professional who invested time and effort in learning higher quality responses in their industry.

# The Self-Implementation PLAN

While pretentiously referred to as tools, what I describe further in the guide are simply mundane gestures, words, and actions, self-explanatory and familiar to most of us. But where are all the success recipes, the enchanting tricks that captivate the customers, the grandiose gestures, and the lavish scenes deployed by luxury hospitality chains?

***If that's what you are expecting,***
***know that you will be disappointed!***

The **WOW** effect you see in the luxury businesses you aspire to learn from is created based on the same, simple and mundane gestures words, and actions: genuine care, attention to detail, passion for service, anticipation, smile, and eye contact!

The truth is, the wealthiest, most well-traveled, and luxury-seeking clientele share a **common set of needs and wishes,** aside from the specific product or service they acquire.:

- recognition, the superior form of acknowledgment;
- feeling valued;
- a sense of belonging;
- appreciation;
- genuine care.

What sets the big companies apart is their access to resources and commitment to cultivating a culture centered around employee engagement and guest satisfaction. The key lies in prioritizing these values with unquestionable consistency - **every single day**.

This means a continuous focus on teaching, reinforcing, rehearsing, auditing, and ensuring the delivery of standards across all departments for every conceivable customer interaction, each day, every day!

**This guide serves as a supportive tool, for medium and small business owners, entrepreneurs, and freelancers, to gradually implement these familiar gestures into the daily behaviors of their professionals.**

The key is to monitor the consistency of purposeful interactions *(are you and your service professionals using the new elements as often as possible until they become natural?)* and assess their impact on guest satisfaction *(are customers reacting to the change, is their behavior different, are their reviews better?).*

In doing so, businesses of all sizes can elevate their service standards and create a positive and lasting impression on their customers.

## INTRODUCING THE STUDY CASE

We will work on a practical scenario to better reflect the applicability of the concepts presented in this guide. I chose a type of business I hope most of you can relate to or easily make an analogy from. Throughout the 5-Week plan, the team below will follow all the steps of self-implementation, define and practice the new standards, work together to transform their approach to service.

## THE Coffee Shop

Envision a small coffee shop, two years in operation, settled in a busy city center, with 3 small tables (10 seating capacity).

Operating from 7 am to 9 pm, it offers an average variety of 10 distinct, high-quality, coffee specialties paired with freshly baked pastries.

Currently, the team is composed of:

- the Owner (**Olivia**)
- 2 Shift Leaders (**Robert** and **Isa**)
- 2 Baristas (**Luca** and **Daniel**)
- 1 Server/Cashier (**Alex**)
- 1 Baker (**Nico**)
- 1 Cleaner/Maintenance (**Jamie**).

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However, despite having a favorable location, good professionals, and quality products, Olivia, the owner, has observed a decline in sales and team engagement in the second year from the opening. The coffee shop across the street thrives, while her team faces challenges – employees seem discontent, calling in sick frequently, and each day feels like an uphill battle.

Online visibility is low, and customer reviews, sporadically received, tend to be average or display disappointment with long queues, little acknowledgment, unwelcoming atmosphere. Former regular customers have drifted away.

Olivia (the owner) has attempted various strategies – from happy hours to altering prices, implementing breakfast offers, and even changing the decor. Should she invest in new coffee machines, switch coffee brands, or hire a marketing coordinator? The efforts thus far, although sincere, have revealed limited success.

In many small businesses, the spotlight often falls on product quality, location, decor, and accessories, because these are visible, palpable changes and because of limited resources and know-how to find and improve from other angles.

> ***The staff's attitude and satisfaction,***
> ***though crucial,***
> ***may understandably take a backseat.***

Yet, where does the customer's experience fit into this puzzle, aren't they supposed to decide what's best for them?

Let's reassess our focus. Rather than viewing a coffee purchase as a routine transaction, let's consider it an opportunity to create a memorable and unique experience for every visitor. Our priority should be on cultivating an environment that goes beyond the ordinary and transforms each visit into an extraordinary discovery within our cozy little café! Wow, so many beautiful but vague concepts, **HOW DOES THIS**

**TRANSLATE INTO PRACTICAL ACTIONS AND STEP-BY-STEP CHANGES** so that everyone knows what to do starting tomorrow?

Firstly, Olivia begins visiting cafes, shops, bookstores, and bakeries that she loves and that other customers seem to extra love (says the online review score or sentiment). While enjoying a coffee, she sits down and observes:

- people dynamics
- conversations
- customer typologies
- gestures and mimics
- atmosphere details
- the flow of service
- speed of preparation
- teamwork
- attitudes
- problem-solving

…oh, and you can observe so much from the corner of your favorite café!

After a while, Olivia is convinced about the necessity for a change within her own business, recognizing the need to invest more in the team's ability to craft experiences rather than just preparing and serving coffee.

This strategic shift aims to: **reclaim a positive reputation | regain regular customers | foster a happier and healthier work atmosphere | boost revenue.**

# The 5-Week (self-implementing) Plan

To kickstart this idea, consider scheduling a preliminary meeting with your team one month before the plan's execution.

Briefly communicate your intentions to implement changes in service behaviors, asking for their valuable support in this transformative journey.

**The implementation will involve:**

- an analytical phase to establish a concrete foundation;
- goal setting to define the desired state of your business through excellent service;
- a structured and simple training plan;
- an ongoing commitment to self-accountability;.

…with the promise to create a rewarding environment, marked by well-deserved celebrations of success and acknowledgment of outstanding performances.

Convey this message to your team with enthusiasm, picturing a better experience for both the employees and the customers.

# Week 1 – The Preparation

## Analyzing the Data

To advocate for the proposed changes effectively, it is recommended that you dedicate approximately a week to preparation, considering your other responsibilities as the owner, manager or representative of a small or medium-sized business. This includes:

- a comprehensive analysis of customer feedback and sentiments;
- a calculation of your current loyal customer base and their consistent revenue contributions;
- an assessment of the online reviews in terms of both numerical data and verbatim comments;
- the administration of a brief engagement survey among employees;
- the summary of the key financial information.

While I understand that this may seem like a substantial task, the detailed examination of these aspects is valuable for guiding the business and should ideally be performed every month. If this practice isn't already in place, now is an opportune time to initiate it. You have the option to conduct the analysis independently or seek assistance from an external, specialized company (recognizing that this may involve a monetary investment).

**To keep it simple,** we are only going to look, in this example, at the evaluation of the three pillars of a successful business, in the exact order based on their importance and influence on one-another:

## EMPLOYEES | CUSTOMERS | REVENUE

### the Employees

#### THEIR PERSPECTIVE

- Conduct focused discussions with team members to gather insights on past challenges and successes *(always start your meeting by explaining your plan to improve some element of the business, for everyone's benefit, reinforcing the idea that their input is the most valuable).*
- Ask specific questions, listen to the answers without judging, rejecting, or justifying, and always say thank you for the feedback you receive.

For a small team, the time would also allow for a quick, free, and anonymous survey that you would ask each one to take 10 minutes to fill in.

**The first way** is more personal and you can obtain also many nonverbal cues to use in your analysis further. **The second one** is less personal but it has the advantage of centralized information, based on the points you want to evaluate. Whatever way you would choose, here are some guidelines:

- ➢ Encourage employees to share positive experiences and successes, providing insights into what motivates and engages them: ***"What aspects of your role do you find most rewarding and fulfilling? What aspects of your role do you find most difficult and unfulfilling?";***
- ➢ Invite employees to share real-life examples, shedding light on successful customer interactions and potential challenges: ***"Can you describe a specific interaction with a customer that positively stood out to you recently?" / "Can you describe a specific interaction with a customer that negatively stood out to you recently?";***
- ➢ Ask employees to reflect on the unique aspects of their service and identify elements that contribute to a positive customer experience: ***"What do you think sets our coffee shop apart in terms of customer service?";***
- ➢ Provide an opportunity for employees to voice customer challenges and suggest improvements, fostering a problem-solving mindset: ***"In your opinion, what are some challenges customers frequently face, and how can we address them better?";***
- ➢ Explore the team's dynamics, identifying areas where communication can be improved to enhance collaboration and overall engagement: ***"How do you feel about the current level of communication within the team?";***
- ➢ Allow employees to express their needs, providing insights into areas where additional training, tools, or resources may be beneficial: ***"What additional support or resources do you believe would help you excel in your role?";***
- ➢ Invite employees to critique existing feedback mechanisms and propose ways to enhance the process for gathering valuable insights: ***"Can you share your thoughts on our current customer feedback process and how we can make it more effective?";***
- ➢ Encourage employees to share ideas for recognition and celebration, fostering a positive and supportive team culture: ***"How can we better recognize and celebrate team achievements or individual milestones?";***
- ➢ Allow employees to contribute to discussions about initiatives that can boost team morale, creating a sense of ownership and involvement: ***"What initiatives or changes do you believe would enhance employee morale and engagement?".***

## YOUR PERSPECTIVE

During two peak periods and two off-peak intervals, dedicate 20-30 minutes to systematically observe the operational dynamics. Take detailed notes during this observation period, focusing on:

- ➢ **Customer wait times**: see how efficiently customers are served during busy times and if there are prolonged wait times. Note employee reactions and behaviors and their impact on customer satisfaction.
- ➢ **Team collaboration**: evaluate how well the team collaborates during busy periods, noting communication and coordination. Observe if there are any tensions, conflicts, or breakdowns, how support and help are offered, and what feelings are being displayed. Pay attention to employee body language during both busy and slower times. Observe signs of engagement, enthusiasm, or potential areas of disengagement among team members.
- ➢ **Customer interactions**: check the quality of customer interactions during busy and slow periods. Observe employee friendliness, attentiveness, and engagement with customers, moments of disengagement, lack of acknowledgment, or damaging shortcuts.

- ➢ **Efficiency in order fulfillment**: observe the speed and accuracy of order fulfillment during busy times. Observe how well the team handles a high volume of orders without compromising service quality. Keep an eye on how the tools are used at their capacity, obstacles that may slow down the flow, or inventory errors that could cause delays.
- ➢ **Employee stress levels**: note the employees' stress levels during peak hours and slower periods. Observe non-verbal cues, facial expressions, and overall demeanor to identify signs of stress or ease.
- ➢ **Cleanliness and organization**: evaluate the cleanliness and organization of the coffee shop during both busy and slower times and employee efforts to maintain a tidy environment.
- ➢ **Upselling and product knowledge**: notice how effectively employees Upsell additional products or promote special offerings during busy periods.
- ➢ **Employee proactivity**: observe employee initiative in addressing customer needs or handling unexpected situations. Assess the level of proactiveness in ensuring a smooth customer experience.

## the Customer

### CUSTOMER REVIEWS AND RATINGS

Analyze the online reviews and ratings on platforms like Google, TripAdvisor, or other review sites you enlisted on. Start with the number of reviews, a low quantity may indicate that your business has a mediocre effect on customers frequenting it, their visit being more of a necessary stop in their way, and there is nothing that grabs their attention, positively or negatively.

> **A high number of reviews could either go in the "great experience that needed to be shared" direction or "avoid this place, the experience was just horrible!".**

Of course, the right number of reviews in a month is "as many as possible", based on your average number of unique clients that month. **Glowing reviews,** critical observation, or subjective views, all the feedback, perceived as positive or negative, as long as it is specific, it's valuable feedback.

Check for **repetitive words** associated with the staff interactions, the product quality, and the atmosphere in general, they will tell you exactly how the service you provide is being judged, what the customer needs to be happy, what are the pain points in your business, what are the blind spots of your reputation.

If you have a **dedicated feedback system**, even better, it can give you a more structured and centralized overview of the most important indicators such as overall satisfaction, top three major issues, problem-solving, complaints handling, etc.

**Social media engagement** is another source of valuable details, but without feeding it, there may be little to collect. Without a regular presence on designated platforms, inviting the audience to debate, engage, comment, and share, you will miss a chance to attract new clients or promote your product to a large, involved, and even loyal public.

The voice of the followers can very well describe the perception of your business, and can definitely be a source of information for you, to use in your quest for improvement.

## the Revenue

There is no need for a comprehensive financial analysis, however, to be able **to correlate customer satisfaction with revenue fluctuations,** you need a clear numerical background. Here are several aspects of revenue that can be analyzed and communicated effectively:

- **Overall revenue trends:**
  - Summarize the overall revenue over a specific period *(monthly, quarterly, yearly);*
  - Highlight periods of growth, stability, or decline compared to the estimated gains, and place them the context by associating them with specific past events *(for example: sales were higher than expected in the first three months after opening, due to the novelty of the place, the location and the quality of products)*;
  - Evaluate the impact of past promotions or marketing campaigns sharing insights into which promotions were most successful and why.
- **Revenue sources:** break down revenue by sources (products, services, etc.) to identify which one contributes the most to overall revenue.
- **Customer segmentation:** look at the revenue based on different customer segments, differentiating between the contribution of new customers, repeat customers, and high-value customers to the overall revenue.

Having the above details transparently outlined, you can crosscheck them with the customer satisfaction patterns and feelings and draw valuable conclusions to support your need for change. You can leverage the data to engage the team in focused discussions, to align service behavior changes with employee engagement, with the expectation to enhance customer satisfaction and revenue growth.

### Set SMART Goals (Simple/Specific, Measurable, Achievable, Realistic, Time framed)

Once you've compiled all the necessary information, the next step is to formulate specific targets that will allow you to measure the success of the shift in your strategy.

Consider objectives such as:

- increased employee engagement through clear incentive and recognition plans;
- revenue increase;
- acquiring new customers monthly;
- gaining new loyal customers annually;
- monitoring the number of reviews;
- analyzing customers' feedback;
- assessing your position in online reviews on various platforms;
- enhancing overall reputation and recognition.

Of course, I would go for one, maximum of two specific goals for each of the three pillars explained before: employees, customers, and revenue. And, as my zeal for specificity cannot be satisfied without clarity, allow me to insist on making these objectives as simple, measurable, and actionable as possible!
Here are some examples of how SMART goals could look like:

## EMPLOYEES

**S**imple Goal: developing employees' customer experience skills.

**M**easurable: Integrating positive and observable actions, gestures, mimics, and words into daily behaviors.

**A**chievable: Learning how to better approach the customer and influence their experience would increase employees' confidence and motivation, inclusive of their personal gains through incentive plans and increased tips.

**R**ealistic: Confident employees display more engagement in their work, naturally serving the customers beyond their expectations.

**T**ime framed: By the end of June (5 weeks from now), all employees have received the necessary training, made personal improvement plans, received support in integrating the new standards of behavior, and already celebrated small wins!

## CUSTOMERS

**S**imple goal: Reach a rating of 4.5 or higher on TripAdvisor.

**M**easurable: Weekly monitoring of the number of reviews and the expressed feedback.

**A**chievable: Elevate service quality to inspire a higher number of positive reviews.

**R**ealistic: Positive ratings attract new customers and reflect an excellent reputation.

**T**ime framed: Achieve the 4.5 score or higher by the end of the year (6 months from now).

## REVENUE:

**S**imple Goal: Achieve a 10% increase in monthly revenue.

**M**easurable: Track revenue growth consistently, month-to-month comparison.

**A**chievable: Focus on improving service interactions to enhance customer satisfaction, leading to increased spending.

**R**ealistic: Satisfied customers are likely to spend more and become loyal.

**T**ime framed: By the end of June (two months from now), sales are 10% higher than the previous month.

**Cascaded actions:**

- Create offers and promotions, happy hours, and deals to attract sales;
- Make them as visible as possible online and physically.
- Implement a consistent Upselling strategy by training the employees and motivating them with simple incentive plans;
- Adapt to the trends by adopting new or additional products or services

> **Prepare to**
> **answer questions, debunk fears**
> **fight resistance and handle negativity.**

If you don't get any of the above reactions, something must be wrong, either the employees are scared to react or they don't care enough to question the change.

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***Even the happiest, most loyal, and most engaged employees experience anxiety, fears, and resistance when presented with a major change like this, it's natural!***

Being prepared will increase the chances of a better understanding. All questions should be answered with sincerity, total transparency, and genuine care for the wellbeing of each team member. Answering with confidence is the ideal way (presenting a plan, having solutions, knowing what is coming, etc.).

But it is also fair to admit that, for some of the questions, you don't have the answer now, or that it is an unexpected question, but do your best to check and formulate a clear response later (a specific later is preferred: by the end of this day, week, etc.).

I also encourage you to **let your vulnerability show**, to admit your own fears and hopes about the change, to ask for help, and express your commitment.

**Let's explore together some of the reactions you should expect and questions to help you prepare for them:**

- Employees may worry that additional training and daily rehearsals will increase their workload, potentially leading to stress, burnout, and the fear of being overwhelmed. ***How is the change going to be implemented so it does not disrupt the daily operations and quantity of work?***

- They may express concerns about fitting in training sessions and daily practice within their already busy schedules, cutting from the time designated for other responsibilities. ***How is this going to happen, time-wise?***

- Employees might express resistance to adopting new customer service techniques, especially if they are comfortable with their current approach, this is a natural manifestation of resistance to change, and not any change, a behavior-altering one! ***How are these new standards going to help us in our work?***

- The expectation of consistently applying enhanced customer service skills may create performance pressure among employees, leading to anxiety and stress. ***How will this take place without creating unhealthy expectations and unnecessary tension?***

- Employees may be skeptical and question the effectiveness of the training, expressing doubts about whether it will genuinely improve their customer service abilities or have a higher impact on revenue increase. ***What are the actual benefits of these new behaviors, where have they been proven to be working, and are they fit for our line of work?***

- Concerns may arise about unclear communication regarding the purpose and benefits of the change, leading to confusion among employees. **How are the changes going to be communicated and monitored effectively?**

- Employees might worry that their efforts in training and practice may not be adequately recognized or rewarded, diminishing their motivation. ***Is there a plan for adequate recognition accompanying this change?***

- Some employees may feel that the focus on enhancing customer service skills leaves little room for their personal and professional development in other areas. **Could the new elements be linked with other development plans in other areas?**

## List out the BENEFITS

Be prepared to present the benefits of the transition, to your team members, ensuring each individual can find personal relevance in these advantages.

The hospitality industry encompasses the largest variety of unique and transferable skills that significantly contribute to performance across various sectors.

The beauty of a transferable skill is that once gained, it can be applied regardless of the industry so, in the eventuality of a career change, you take it with you, it makes you valuable and distinguished.

Some of these skills are:

- empathy
- vibrant personal presence
- adaptability
- authentic communication
- problem-solving
- proactive engagement
- genuine care
- attention to detail
- conflict resolution
- teamwork
- leadership

Explain to your team that your strategy is changing the context *(have a clear plan, offer instruments, allow time for learning, properly reward the efforts, and celebrate)* so they can improve their behaviors and eventually gain a new perspective, a new mentality and see their work and its impact differently.

**By doing this, you are aiming for a whole mindset shift:**

***your professionals will learn to position themselves as influential contributors to the customer experience rather than perceiving their role as mere servitude.***

The customer is living their own story and relies on you to keep the narrative flowing. Recognizing the influence you hold in shaping their journey, should reveal the power you have and the responsibility that comes with it.

Before this beautiful vision can be broken down into concrete and small steps, let's review some of the **universal and more practical benefits of investing in customer service skills.**

➢ Professionals owning strong customer service skills often receive recognition and rewards, potentially leading to bonuses, incentives, and higher tips. So, the opportunity, to learn and improve your communication and interaction with the customers, presents an increased earning potential.

- ➢ Successfully addressing customer needs and contributing to positive experiences can instill a sense of accomplishment and job satisfaction in customer-facing professionals. And when you like what you do, it will seem easy, you can teach others and keep you motivated.

- ➢ Strong customer service skills contribute to positive relationships with clients, colleagues, and leaders, fostering a collaborative and supportive work environment. This makes you visible, and memorable, makes you stand out, opening a big window of opportunities coming your way.

- ➢ Exceptional customer service skills create prospects for professional growth, potentially leading to promotions and career advancement within the company or the industry. With exposure to so many transferable skills, you can boost your experience and be ready when that great chance arises.

- ➢ Professionals with high customer service skills are more adaptable to different situations and customer personalities, making them valuable assets in dynamic and fast-paced work environments. They also contribute to a positive company culture, promoting teamwork, collaboration, and a shared commitment to customer satisfaction.

## PRE-PROJECT MEETING - Start with the leaders and gain their commitment!

Once you draw your conclusions for analyzing the data, summarize the correlation between the results and customer satisfaction, draft the SMART Goals, invite the leaders for a coffee, put on your enthusiastic hat, and present the change and the backup support numbers *(Olivia, our coffee shop owner, is going to have this first meeting with the two shift leaders, Robert and Isa, to understand their opinion and gain their support for what's coming).*

- Give them the privilege to hear and critique this first, so they can become your business partners later.
- Be clear and simple in presenting the data you gathered, what you concluded, and the measurable and realistic goals you drafted *(yes, only drafted, because you will need their input and commitment to finalize them).*
- Then summarize the learning and implementing plan (that will be detailed in a future chapter).
- And finalize by listing the benefits for each professional in your team and for the company.
- Ask for their opinion and listen carefully following the rules of a brainstorming session: no opinion is rejected, judged, not even commented, or non-verbally dismissed.
- Collect everything, all the concerns, questions, proposals, ideas, mimics, and gestures, and address them one by one with care. Yes, even if you have to be vulnerable and say "I don't know yet how is that going to work".

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- Your leaders may use this opportunity to voice semi-related frustrations *(salary increase, rotation schedule, days off preferences, extra hours; assuming you would not plan a change like this on a broken foundation of equipment malfunction, communication, and work condition issues)* - one thing is clear, keep the discussion on the topic (what do you think of the plan to enhance the customer service level) without rejecting any of the expressed concerns, just write them down proposing an answer when everything has been debated.
- Ask for support from the leaders to cascade the information and help you with the implementation.

## PREPARE TO CASCADE IT TO THE TEAM - Be the one communicating the change!

**RE-DESIGN** the presentation of all details to address the rest of the team members, and ensure to include all of them, not only the front-line professionals: from the administrative assistant to the marketing coordinator and cleaning and maintenance staff.

**SIMPLIFY** the information you presented to the leaders: use visual charts, bottom line numbers, and obvious links between enhancing the skills and visible improvements.

Keep the maximum **TRANSPARENCY** and even vulnerability in the face of the unknown, inclusion, goal setting, fear debunking, and concerns collecting.

Present yourself as **THE FIRST ONE TO EMBODY** all the standards, welcoming open feedback, committing to keeping each other accountable, and celebrating success.

Remind everyone that this is a self-implemented change, without the help or support of a third party, relying entirely on mutual support, the capacity of keeping each otter responsible for the benefit of each individual and the business itself.

### Summary of your goals for Week 1

- Observe and measure the engagement of your employees;
- Analyze the customer feedback and highlight the trends;
- Review the financial implications of the changes;
- Summarize all details in a clear and visual presentation for your team;
- Link the results to the benefits of improving the service behaviors;
- Draft your goals for the desired state.

# Week 2 – The Kick-Off Event

## The Kick-Off Event

Visualize this event as an engaging meeting combined with practical training, exercises, and groupwork. This is your one chance to present the change as an amazing opportunity, help your team see the benefits, understand their role, and see their direct contribution.

You can definitely apply your own style of delivery and level of personalization; the guidelines below are universal and comprehensive to offer you a good start.

**The most effective way to navigate this phase is alongside your team!**

Having direct contact with the daily reality of the customers, they are the experts, and involving them will ignite their participation and contributions. Depending on the size of your team, it may be necessary to repeat this process 2-3 times to ensure everyone is present.

In our **STUDY CASE**, with a team of 8 members, including the owner, Olivia, the leader recognized the significance of this change and organized a very special day with the assistance of Robert and Isa, the two shift leaders.

The **Coffee Shop** was temporarily closed, and announcements were made, a week in advance and closer to the event, on social media and outside the store to inform customers:

> ***"Today, we are working on something great to enhance your experience with us. Thank you for your patience, and we look forward to warmly welcome you in the coming days!"***

The three organizers transformed the shop into a training space:

- rented a video projector and a flipchart for the day;
- selected uplifting music;
- ordered treats to allow the chef to enjoy the experience;
- orchestrated a special welcome.

Each team member received a customized invitation, containing details about the project, the big topics on the agenda, and special thanks for their priceless involvement.

As team members arrived at the agreed-upon morning hour, they were:

- greeted with **BIG SMILES** and enthusiasm;
- offered their **PREFERRED COFFEE** or drink before asking;
- **THANKED** for their participation in the transformation;
- presented with **PERSONALIZED NOTEPADS**, workbooks and a small gift bag *(a quality travel coffee/tee mug with their name/nickname engraved on it).*

***For larger teams, where closing the business for a day is impractical, the same Kick-Off Event, with a warm welcome, can be replicated in two sessions, hosted in a meeting room at a nearby hotel (yes, full event planning and a minimum budget should be forecasted).***

After the team has enjoyed the welcome drink and had the chance to talk to each other informally, the facilitator can start transitioning to the enlightening part of the event, by presenting the agenda while everyone settles down comfortably.

## The facilitator of this event plays a crucial role!

The audience is most responsive when they enjoy the presentation and have confidence in the presenter. The business owner or the leader, positioning themselves as the first role model and believer in this change, would be ideal to lead this event and all its details.

But between a confident, prepared but uncharismatic leader and a well-liked, prepared, and close to the team shift leader, I would definitely choose the latter, invest in their preparation, and ensure an enjoyable and fruitful event. Or divide the parts of the agenda based on prevalent skills: presentation versus facilitation.

The day should be divided into 3 main parts, adding lunch and 2-3 other small breaks, helping the participants process all the new details.

**Part One (1 hour):**

- **Welcoming:** Enjoying the coffee and the informal setting.
- **Event Overview:** Clarifying the purpose and outlining what the event encompasses.
- **Current Status Presentation:** Sharing the results of a week's preparation to set the stage.
- **Goal Setting:** Articulating where you aspire to be, through an intensified focus on customer service, outlining the goals.
- **Benefits Presentation:** Highlighting the positive outcomes and advantages for each individual and the company.

**Part Two (4 hours):**

- Participate in the **Client Avatar Exercise** (Optional).
- Present each relevant **Touchpoint** in your **Unique Customer Journey**: understanding the importance and the application of each new action, gesture, word, or mimic.
- Analize with the team, for each selected Touchpoint, the Current State and the **Desired State**.
- Discuss the importance of each **Simplified Luxury Behavior** you choose to implement (if any).

**Part Three (1 hour):**

- Reinforcement methods: Outlining how reinforcement mechanisms will function.
- Celebration, Rewards, and Recognition: Concluding with a discussion of practical ways to celebrate success.

## LOGISTICS

- In terms of logistics, utilizing a flipchart divided into two sections, allowing the collection of details on the current status and ideal status for each chapter below, would be effective.

- Anything that is technologically advanced and streamlines the process, thereby reducing additional work, would be highly beneficial.

- Offering workbooks where the participants can have the overview, write down personal notes, and capture examples or indications can, as well, be a great addition and a guide for further practice sessions.

And since Part One was briefly described before and contains details specific to your particular business, I will focus on Parts Two and Three of the event.

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***My recommendation is to go over Part Two entirely, more than one time, and do the exercise of what applies to your business in terms of current state and desired state, by yourself, before facilitating this to your team.***

Thus, make sure you understand and can exemplify each element, integrating it in the realities of your field of work.

## ! Very important note!

To better prepare for the vast amount of information that is presented in this chapter (Week 2), it's crucial to understand, that not ALL applies to your unique business, so you will have to select only what is relevant and important for you and your team!

This will help you manage the overwhelming feeling of having to go through too much information!

For example, "Simplified Service Behaviors" are only an optional selection of element, designed to enhance the service to a very high level! You can choose to implement only one, none or all!

I included so as many details as possible in this guide, to better serve a diverse line of businesses, **but you must only take what you need!**

# The Customer Journey

If the initial segment of the event serves the significant purpose of setting the stage, the subsequent two parts are dedicated to elucidating the 'how.'

Below, you'll find a list of the most common reference points in the customer's experience, applicable to customer-facing businesses. While I acknowledge that these may not be relevant to all types of businesses, I will present the necessary details for all-encompassing applicability.

Keeping our **Coffee Shop** study case in mind but with an adaptable model for all customer-interacting businesses, here are the reference points along the customer's journey that we stop to analyze, together with the team:

The Client Avatar Exercise

1. The Reservation
2. The Welcome
3. The Ambiance and The Amenities
4. The "How May I Help You?"
5. The Conversation and The Upsell
6. The Timeliness
7. The Complaint and The Recovery
8. The "Going the Extra Mile"
9. The Payment, the Hot Feedback, the Farewell

## *The Client Avatar Exercise*

**IN THIS EXERCISE:**

- participants will be divided into two groups, ensuring a balanced mix of front-line employees and those from the heart of the house / back office.
- each group will have 10 minutes to collaboratively create a detailed client avatar by answering specific questions.
- it is crucial to emphasize that you expect a minimum of one and a maximum of three elements per question to maintain precision in identifying your specific client profile.
- upon completion, both groups will share their profiles, identifying commonalities and distinctions to finalize this activity.
- if certain questions remain unanswered, consider this an opportunity to gain valuable insights into aspects of your customer base that may not have been previously acknowledged.

By launching this exercise to her groups, Olivia (the coffee shop owner) looks forward to seeing the team members working together to define their representative customer typology. She remains available for questions or indications while the groups work, and makes sure to keep track of the time so that the agenda stays on track.

➢ **Demographics:**
- Age: What is the typical age range of our customers?
- Gender: Do we observe a predominant gender among our customers?
- Location: From which geographical areas do our customers primarily come?

➢ **Occupation and Lifestyle:**
- What are the common professions and income levels of our customers?
- What interests and hobbies are typically shared among our customers?

➢ **Product Preferences:**
- What are the most popular coffee specialties among our customers?
- How often do our customers visit the shop / employ our services?

➢ **Buying Behavior:**
- What is the average spending capacity of our customers?
- Are purchases at our coffee shop typically planned or impulsive?

➢ **Tech-Savviness:**
- To what extent do our customers use technology in their daily lives?
- How actively do our customers engage with our shop/business online?

➢ **Social Behavior:**
- What common social activities do our customers participate in?
- How often and on which platforms are our customers active?

➢ **Dietary Preferences**
- Are there prevalent dietary preferences or restrictions among our customers?
- What types of pastries or snacks are most popular among our customers?

➢ **Customer Loyalty:**
- How many customers actively participate in our loyalty programs?
- How frequently do customers become repeat visitors?

➢ **Preferred Atmosphere:**
- What type of ambiance do our customers prefer – cozy, quiet, or lively?
- Do customers prefer indoor or outdoor seating?

Here is how the exercise with the **Coffee Shop** groups went:

**Demographics**

Primarily between 25 and 40 years old, with a mix of working professionals and students seeking a caffeine fix. A balanced mix of genders, with a slight leaning towards young professionals. Mainly coming from the nearby city center and surrounding neighborhoods, drawn to the convenience and vibrant atmosphere.

**Occupation and Lifestyle**

Diverse professions including office workers, freelancers, and students with moderate to above-average income levels. Engaged in urban living, with interests in arts, literature, and tech; often looking for a cozy spot to unwind or work.

**Coffee Preferences**

Espresso-based beverages are popular, with a keen interest in trying unique and seasonal specialties. Regular customers visit 2-3 times a week, mixing between morning and evening hours.

**Buying Behavior**

Willing to spend a bit more for quality, with an average transaction value higher during the morning rush. Showing a combination of both planned and impulsive shopping; planned visits during routine work breaks and impulsive visits for a quick pick-me-up.

**Tech-savviness and Social Behavior**

Moderately tech-savvy, likely to use smartphones and digital payment methods. Actively engaged on social media platforms, especially Instagram, sharing coffee experiences and checking in. Participates in local events and gatherings, occasionally using the coffee shop as a meeting point. Active on various platforms, sharing experiences and reviews, and contributing to a lively online community.

**Dietary Preferences**

Few dietary restrictions, and a growing interest in vegan, sugar-free, and gluten-free options. Classic pastries like croissants, muffins, and artisanal cookies are well-received.

**Preferred Atmosphere**

Enjoys a cozy ambiance with a touch of liveliness, making the coffee shop a versatile space for work and relaxation. Prefers indoor seating, especially near the large windows for natural light.

***This client avatar represents the typical customer profile for the small coffee shop, providing insights for tailoring services, promotions, and the overall coffee shop experience.***

This could be adapted and expanded for all types of businesses to better understand and then address the wishes and needs of your direct customers.

## *1. The Reservation*

For small businesses such as beauty or barber salons, private clinics, small restaurants, consultancy agencies, and many others, the booking process can incorporate additional elements to convey a sense of quality and experience.

As my focus is on guiding small and medium businesses that aspire to elevate the status of their interaction with the client, I will choose a medium level of complexity that prioritizes authentic relations over rigid standards.

Consider the following actions to transform the booking process into a remarkable business card:

➢ **Prompt response:** Answering within 3 rings demonstrates respect for each call as a potential client.

➢ **Engaging Opening line:** Start with a welcoming greeting, for instance, ***"Good morning, you've called [Business Name], this is Mary, how may I assist you?".***

➢ **Polite language:** Utilize phrases like "of course," "my pleasure," and "allow me a moment".

➢ **Personalizing the interaction:**

- Request the caller's name with ***"May I have your name?".***
- Ask questions during the booking process is a sign of extra care. While, through closed questions, the host can efficiently gather essential information about treatment preferences, timing, group size, and potential allergies, introducing less expected questions could contributes to a more personalized preparation.
- Here are examples of questions that can add value by the fact that they address special aspects of the dining experience:

*"Are you celebrating anything special during your visit? How could we make it memorable for you?"*
*"Is this your first time joining us, it would be my pleasure to offer you a welcome drink or a tour of the location?"*
*"Do you have a favorite non-alcoholic drink we can prepare for you; we want it to be just as you like it?"*
*"May I take a moment to present our exclusive offers for this month?", etc.*

➢ **Complimenting and using names:** Express gratitude and use the client's name, for example, "Thank you for choosing us, Mr. Client, we look forward to welcoming you!".

➢ **Closing on a positive note** with a friendly "Have a great day!".

By incorporating these elements, the booking process transforms into a great first impression. As you can see, while nothing is complicated, the only thing that makes the difference between a mediocre reservation taking and a successful start is the consistency of applying these elements.

In our study case, at the **Coffee Shop**, the concept of reservations might seem absent initially, as the shop predominantly operates on a walk-in basis, with a fast-paced, first-come-first-serve approach. However, despite the absence of formal table bookings, the **Coffee Shop** does have a telephone, occasionally receiving calls from clients.

This presents a great opportunity to create a positive impression through the application of minimum telephone etiquette suitable for a bustling café. A succinct and friendly greeting like:

***"You've reached Coffee Shop, this is Mary, how may I assist you?"***

…with a swift pace and a smile can go a long way. Make it sound natural, and specific to your line of work, keeping in mind the following items: location identification, self-introduction, offer of assistance, and a friendly tone.

Going back to the flipchart of the current and desired state, together with the team, Olivia is defining the actual form of the booking phase for her shop:

| **Touchpoint** | **Current state** | **Desired State** |
|---|---|---|
| The Reservation | Answering in a busy tone: "Yes!" or "Coffee Shop!" or "Hello!" | Answering with a friendly tone: "Hello, you've reached Coffee Shop, this is Mary, how may I assist you?" |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

## *2. The Welcome*

Welcoming is particularly important because done properly, it offers instant gratification.

*Think of a time when you were truly welcomed in one place, maybe a friend's house after a long time, your parents' home for your birthday, or back to work from vacation.*

- ***How did you feel? Like the most important person in the world?***
- ***Have they all stopped everything they were doing to celebrate your presence, to show interest in what you have been doing?***
- ***Have they smiled and hugged you and excitedly jumped to offer you a sit next to them, a drink, or a meal?***

Do you think is possible to generate that feeling in a customer? (without the hugging and jumping part maybe, or not necessarily)? I know it is possible but it's not an easy task, at least not without a natural charm or well-studied and practiced tips.

**1. In businesses where appointments are required**, such as restaurants, beauty salons *(including all the various niches like nail salons, hair salons, cosmetic treatments, body treatments, brows studios, etc.)*, private healthcare providers, dental clinics, mechanic shops, spas and wellness centers, counseling services, and any business with a reception desk and a welcoming representative or an employee present, the chances of creating a compelling welcome are higher, given the time for preparation

Here are some universal aspects of a **QUALITY INTERACTION**:

➢ The host (the employee) must **be the first** to proactively initiate greetings, from a distance up to speaking proximity, ideally approaching customers physically or stepping out from behind the reception desk.

➢ They should **take charge of the conversation**, guiding the customer through the next steps. Introducing themselves by name and/or role and asking for the customer's name establishes a closer connection.

➢ **Expressing gratitude** for the customer's presence is a nice touch.

➢ **Reviewing the reservation** can bring up valuable details such as special occasions, first-time visits, preferred drinks, or the type of treatment or service needed. This is where you can surprise the customer with birthday wishes, a tour of the location or menu, serve their favorite drink, or offer preferred seating without even being asked.

These suggestions aim to **transform a basic, mediocre, or even poor customer welcome into a remarkably simple yet memorable one.**

**2. In businesses with predominantly walk-in customers -** such as coffee shops, retail stores, grocery stores, fitness centers/gyms, pharmacies, casual dining restaurants, bookstores, boutiques, etc. the welcome holds significant influence over the next points in the experience.

While booked services/products may already secure a commitment, in walk-in scenarios, a warm welcome can determine whether the customer leaves as they enter, and becomes a one-time visitor or stays and become a regular client.

**Despite the operational differences between the two business types, the fundamental principles of a great welcome remain constant.**

The host in a walk-in setting must exhibit creativity in learning about the customer on the go. Nevertheless, a simple smile upon entry, accompanied by eye contact and acknowledgment, and, if possible, a brief "I'll be with you in a moment," can suffice to retain the customer's interest and excitement.

Creating a welcoming atmosphere at the **Coffee Shop** has taken many forms and it's about to try a new and improved version.

**This involves three key elements:**

- the ability of the barista/server/cashier to discreetly monitor the entrance while attending to their current responsibilities;
- a warm smile;

- courteous acknowledgment through eye contact, nodding, or even a friendly hand wave—especially for regulars or those accompanied by small children.

These simple gestures communicate to both new and returning customers, whether they are alone, in the shop, or patiently waiting in a queue, that they are valued, seen, and important to us. Having acknowledged and welcomed them in this way, we can then focus on providing attentive service to the client at hand, knowing that those waiting have been properly greeted and recognized.

After explaining this briefly, our facilitator, Olivia, will go back to the flipchart and clarify with the team:

| Touchpoint | Current state | Desired State |
|---|---|---|
| The Welcome | The server/cashier is busy with the current customer, and the barista has their back at the door while preparing coffee. The chef is occupied with refilling pastries, and there is no acknowledgment of new customers entering the door. | Everyone who is exposed to the customers, either continuously or briefly, will proactively "monitor the entrance." Upon a new customer's arrival, they will greet with a smile, make eye contact, nod, and express gratitude for the client's patience in enduring a potentially long queue (verbally or non-verbally). |

**How does your business address this touchpoint? Dedicate a few moments to think about it and write down ideas!**

## *3. The Ambiance and the Amenities*

This translates, in customer language, to:
**What catches your eye?**
**What do you hear?**
**What do you smell?**

…all contributing to your experience (how do you feel?) in this place. While one business owner might prioritize an impressive décor, a carefully selected music, or an expensive ambiance perfume, **the most impactful elements of the ambiance are the dynamic ones - the people!**

*Imagine stepping into a cozy bakery on a winter day, mouthwatering for a delightful apple pie and a hot cup of coffee. What do you notice? That nobody noticed you? "It's ok, you think, I barely entered the shop!". Then you reach the counter ready for your order, but no one is making* *eye contact (yet, you hope!). You observe the staff appearing bored and somehow also overwhelmed, moving sluggishly between the coffee machine and the oven. You dare to say "Excuse me!".*

*While waiting for a response you notice their grooming (or lack thereof) that raises cleanliness concerns, and their indifference to you entering the shop, now feels like a cold slap in the face. The connection finally happens when one of the servers asks "Yes?" as in "What do you want?", half body turned towards you while arranging the cups on the heater. "May I have some coffee and apple pie?", "We don't have apple pie!" came the answer, as the server turned away fully to focus on arranging the cups, leaving you to digest that answer in peace. As you take in the scene, you hear the staff in the back discussing personal issues engaged in a heated argument. On top of this, the loud whirring of the coffee grinder and the beeping of the oven (that no one seems to ever handle) add to the cacophony.*

*Yes, the enticing aroma of freshly baked pastries and coffee fills the air still, but overall, would you endure the cold outside to find another spot, or would you stay? I'd choose to leave – I'd feel like a burden to the staff, unwanted, and disrespected. The beautiful winter decorations, the cozy inviting tables, the warmth of the coffee, and the enchanting carols playing were overshadowed by the dynamics of the "hosts".*

Every business location, the moment a customer walks in, transforms into a stage. Here, the hosts play the role of actors, ensuring an entertaining (enjoyable, valuable, memorable) experience. The physical attributes of the space - the cleanliness, the quality of displayed products, the furniture, design, view, aroma, music, and technology - all play a significant role in enhancing the customer's enjoyment.

However, it's the human presence, with its values, adapted behaviors, genuine care for the client, and expertise, that breathes life into this stage: **WELL-GROOMED PROFESSIONALS** (*pointing on grooming and appearance, if there is no budget for uniforms, a coordinated style can also work, to reflect a professional image with minimum effort: jeans and black t-shirts, black pants and white shirts, discreetly comfortable shoes, hair up to uncover the face, and, the most importantly, showing impeccable hygiene*).

Going back to the flipchart, the **Coffee Shop**, Olivia continues the training with the team: Imagine someone captures a 1-minute video during a bustling morning in the shop. Would that video truly reflect the ambiance and vibe of this place? Here's what it might show:

| Touchpoint | Current state | Desired State |
|---|---|---|
| The Ambiance and The Amenities | *A captivating coffee-themed shop, the aroma of fresh coffee and pastries, complemented by lively jazz music blending seamlessly with the background hum of the coffee grinder. Some customers savoring their beverages, while engaging in captivating conversations. Others form a line for ToGo options.*<br>• The server appears frowning and preoccupied, rushing between tables and the bar.<br>• The barista is absent-minded, making coffee with their back to the customers, and the cleaning staff moves slowly and aimlessly.<br>• The cashier impatiently and loudly asks the barista for a coffee order they placed two minutes ago.<br>• There are half-empty pastry trays, clients in line are showing signs of impatience, the cashier moves swiftly yet detached while performing soulless interactions "Here's your coffee, pay here!" (with no time for goodbyes), then calls out "Next!" as if the line weren't right in front of them. | *A captivating coffee-themed shop, the aroma of fresh coffee and pastries, complemented by lively jazz music blending seamlessly with the background hum of the coffee grinder. Some customers savoring their beverages, while engaging in captivating conversations. Others form a line for ToGo options.*<br>• In the midst of this, an attentive, smiling, and engaged server effortlessly tends to tables, ensuring a seamless flow.<br>• The barista, happily preparing the coffee orders, occasionally turns to share a warm smile.<br>• The cleaning staff moves with purpose, maintaining a tidy and welcoming environment.<br>• The cashier thanks the client for their patience while waiting.<br>• The energetic staff gracefully attends to guests in line, fostering a positive and memorable experience.<br>• Smiles and acknowledges the customer at the end of the line with a silent "will be with you shortly"! Transactional interactions become meaningful connections—with a sincere handover of the coffee and a friendly invitation to pay, accompanied by warm goodbyes. The cashier calls out "Next!" with a welcoming tone, acknowledging the vibrant atmosphere that extends right up to the line. |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

## *4. The "How May I Help You?"*

Along the customer journey, the phrase "How may I help you?" marks an important transition from welcoming to doing business. This versatile expression, or its variations like "What can I do for you?", "How can I assist you today?" serves as a crucial link, allowing professionals to actively engage with customers. Through the answer to this question, the customer can say so much about their needs and interests, listening to both the words and subtle emotional cues you can capture important details to help you create an experience rather than just resolve a request.

The power of "How may I help you?" extends beyond its words.

**It embodies proactive service and a commitment to genuine assistance.**

Businesses using this phrase recognize the uniqueness of each customer and strive to tailor their responses accordingly. It's like a promise of dedication and being there for the customer.

Have you ever entered a post office or a pharmacy and instead of "How can I help you?" or "What can I get you!" you receive a questioning look (?), a scolding "Yes!" or a startling "Next!"? How does that make you feel? Maybe you did not even notice the difference, but now you know!

In our fast-paced **Coffee Shop** study case, Olivia and the team clarify this aspect so they can add it to the transformation plan towards the desired state of their customer interaction.

| Touchpoint | Current state | Desired State |
|---|---|---|
| The "How May I Help You" | As the customer approaches, we say "Next!", "yes?", or simply display a "questioning" look on our faces meaning "Well? What can I get you? And hurry up, can't you see the queue?" | As the customer approaches, we will say (and when possible, if we know the guest, we MUST use their name after the question!): "What can I offer you, Mr. Client?", "What would you like to order, Ms. Client?", "How may I help you, Mr. Client?" |

**How does your business address this touchpoint? Dedicate a few moments to think about it and write down ideas!**

## *5. The Conversation and The Upsell*

### the Conversation

#### Scenario 1

A woman steps into a flower shop, saying hello to the shop employee who's busy arranging flowers and tidying up. She starts exploring the various flowers, arrangements, bouquets, statues, and flower pots. After a few minutes of bustling work, the employee interrupts to ask, "Have you decided?" The woman replies, "It's very hard; there are just so many beautiful options."

The shop employee, without missing a beat, says, "Let me know when you decide," and continues the loud work around the shop. Eventually, the woman picks up a pot with roses, hesitates, takes an orchid, changes her mind again, and eyes a beautiful but pricey arrangement. With a shallow voice, she asks, "Can I have an arrangement like this one but less expensive?"

The employee stops, picks a completely different arrangement, and says, "I have this one if you want something cheaper." The woman says: "It's ok, I will buy them chocolate instead, thank you anyway!" and leaves the shop.

## Scenario 2

A woman steps into a flower shop. The shop employee pauses from arranging flowers and tidying up, to warmly greet the woman entering, with a big smile and an enthusiastic "Welcome!". After allowing her privacy to explore the shop, the employee asks, "How may I help you?" The woman replies, "I need to buy some flowers, and there are just so many beautiful options; it's difficult to decide."

Sensing an opportunity for a meaningful conversation, the employee responds, "Well, that's why I'm here, happy to help you!" and starts asking questions: who are the flowers for, their favorite colors, the occasion, what emotions the flowers should evoke, details about the recipient and their relationship, and the budget. The shop employee uses the answers to personalize the flower selection and shares some interesting facts about some types of flowers, ensuring the woman leaves happy and confident in creating a memorable experience.

They select together a few types of flowers, matching the personality, interests, and occasion, thus even telling a story! Through personal care and genuine interest, the shop employee not only meets the woman's needs but also opens the door for an Upsell, making the entire interaction meaningful and memorable.

## the Service Professional VS the Detached Employee

Regrettably, the usual situation tends to be the first one or some variation of it.

> ***The key difference between the two experiences lies in the genuine care and sincere interest shown by the shop representatives in their jobs and each customer they assist.***

This included asking sincere questions, using their passion for flowers, and taking pride in their work. I understand that putting these principles into practice is more challenging than talking about them.

This distinction defin es the gap between a service professional and a detached sales assistant, coffee server, barber, spa attendant, receptionist, host, and so on. The second category can be described as lacking pride in their work, not seeing value in serving customers and treating their job as a simple task without the need for personal or professional development beyond the minimum requirements ***(a transactional exchange of goods and money without putting in much effort).***

This mindset can lead a business, providing quality products, to lose its reputation, customer loyalty, and the necessary revenue to thrive.

## THE REALITY IS EVEN HARSHER

.

The so-called "detached" employees bear no responsibility for mediocre guest interaction. It's not about bad intentions; they simply don't know any better, that's the accepted level, no expectations were provided, and no feedback was offered.

They were hired, placed at the counter, and absorbed in the ongoing dynamics of the everyday activities.

## Initiating change begins from
# THE TOP.

If the leader or owner understands the value of each customer and prioritizes a great reputation for their business, their employees can become professionals through training, feedback, reinforcement, celebration, and consistency of all these actions.

### Why make CONVERSATIONS while serving the customer?

How do we define conversation in this context: a brief dialogue based on questions and observable cues, that would:

- build a deeper connection by showing interest and curiosity;
- learning helpful details about preferences, needs, and wishes;
- bonding through similar experiences.

On this ground, the **ANTICIPATION**, further **PERSONALIZATION**, and **RECOGNITION** can align beautifully to surprise the customer. Engaging in friendly dialogue creates a closer connection, which could be the chance to address concerns or questions promptly, or before turning into complaints; influence the overall satisfaction, address individual needs separately.

What can we converse about? There are three sources, from my point of view, to keep it simple, of course:

- ➢ general topics *(like the weather, traveling, international news excluding politics, religion and other possibly sensitive subjects);*
- ➢ light business topics *(the interests of certain products or service, the choice for our business, the passions and hobbies that relate to what you are selling, common interests, etc.);*
- ➢ observable *cues (use what you see: kids and family, favorite sports team, accessories, travel flight carrier tag, special occasions, etc.),*

### What is essential to check BEFORE engaging in conversation?

Before initiating a conversation, it's crucial to observe and interpret the cues provided by the customer: body language, facial expressions, and overall demeanor. Are they open to engagement, or do they seem reserved?

#### For example:

If a customer appears busy or preoccupied, it might be advisable to keep the interaction brief or choose a more opportune moment.

On the other hand, if a customer seems relaxed or engaged, it may be an ideal time to initiate a friendly conversation, and not doing it is a missed opportunity to step up the service.

**CONFIDENCE** is very important when attempting a conversation with a customer. Service professionals need to feel confident in their knowledge, language skills, and vocabulary to communicate effectively. This could sound more discouraging than motivating, I understand, but it can make the difference between a forced or prematurely ended conversation and a delightful exchange of ideas and insights!

> ***You don't need to be an expert in conversation or a know-it-all in small talk, but choose the topic that works best for you and your customer.***

Here is one conversation you don't need to have, choose a more relatable topic: service employee observing the t-shirt the customer's wearing, starts conversation *(with an obvious football team name on it):*

- ***"Are you a fan of Real Madrid?"***
- ***"Yes, they are amazing, are you a fan too?"***
- ***"Oh, no, I don't even watch football…"***

…disappointing, right?

The **CONTEXT** of the interaction plays a vital role in determining whether a conversation is appropriate. For example:

In a retail setting, engaging in conversation about product preferences may be well-received.

In contrast, in a more formal or time-sensitive environment, such as a financial transaction or medical appointment, the context may limit the extent of the conversation.

It's essential to be attuned to the context, ensuring that any conversation enhances rather than hinders the customer's overall experience.

## the Upsell

Instead of struggling with complex upselling techniques, scripts, and negotiation skills, a service professional should prioritize a simple yet effective approach in every customer interaction: consistently incorporating the specific practice or mentioning it *(the offer, the combo, the discount, the happy hour!).*

For instance, if there's a seasonal drink promotion, the professional can use various straightforward phrases to introduce and encourage customer interest. These phrases should be used consistently but without sounding robotic, or having the customer tell you that he knows, he heard you when you told the lady in front of him the same phrase…

Here are some examples, with the same encouragement of creating some that represent you and your business, and remember to bring them up to the customer, with every reasonable opportunity.

- *"We're promoting a delightful seasonal drink (with specific details), would you be interested?";*
- *"Have you tried our delicious seasonal beverage? It's quite a treat!";*
- *"We have a delightful seasonal drink that's perfect on this weather, today! Here are more details…";*
- *"If you enjoy flavors like pumpkin, lemon, or coffee, we have a must-try seasonal drink tailored just for you."*

Engage in this practical exercise by identifying phrases relevant to your business, and seamlessly incorporate them into your standard interactions, starting with the next customer. While traditional methods, such as **displaying offer posters in the shop, utilizing a frequent rotation of reels on social media, and having employees ask customers if they've seen the current offer**, have their merits, they may have limitations in terms of impact.

By adopting a personalized approach in customer interactions with cues-based phrases, you can potentially achieve more meaningful and direct engagement, enhancing the effectiveness of your promotional efforts.

**Here are some examples for various businesses:**

- *"It's so hot outside, would you like to try the iced coffee we crafted instead of your regular americano today?";*
- *"I know you like red color for your nails, we have received an enhanced nail polish, for the winter holidays with vitamins and special oils to protect your nails but also look festive!";*
- *"I see you prefer long dresses, have you seen the new collection? Let me show you some models that would look gorgeous on you!";*

Let’s go back to our facilitator, Olivia, in the **Coffee Shop**, taking her team through another exercise:

| Touchpoint | Current state | Desired State |
|---|---|---|
| The Conversation<br><br>and<br>The Upsell | There is little to no time for making conversation.<br><br>What would we even talk about in such a short time?<br><br>It happens only if the customer asks a question…<br><br>Well, the offer is on the display and each table, if anyone is interested, they just need to ask. | Let's first distinguish between responding to customers' questions and initiating casual conversation to personalize the interaction.<br>We will identify the right moments, such as obvious conversation points (like a sweet baby), a small queue, or a slower pace during the afternoon shift, by observing the customer's body language.<br>We will actively watch for cues that can serve as conversation starters, including messages on T-shirts, coffee choices, repeat customers, special weather conditions, or the presence of tourists from other countries.<br>We will utilize various conversation starters, such as "I see you have…," "I noticed you…," "Where are you from?" and "How is your day going?"<br>We will remind the customer of the special offer whenever possible without sounding annoying or robotic, continuously seeking new ways to present it. Additionally, we will compile a list of five phrases for each promotion we have in place. |

The strategic integration of conversations during service interactions amplifies the overall customer experience, offering advantages in personalization, rapport-building, issue resolution, and satisfaction. In the context of upselling, the practical approach advocated encourages small businesses to adopt straightforward yet engaging language, tailored to their unique offerings.

This personalized approach aims to enhance the effectiveness of promotional efforts, enabling small and medium businesses to foster direct and meaningful engagement with customers.

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

## *6. The Timeliness*

Respecting the customer's time involves more than just working quickly; **it requires the ability to discern and respond appropriately to various levels of urgency**, whether that involves accelerating the pace, slowing down, or striking a balance between the two.

The businessman stopping by for a quick espresso and the couple enjoying a romantic dinner have distinct service speed preferences. Applying the same service speed universally lacks room for personalization. Training employees to understand and act on these cues serves as another brick on the experience wall.

| Indications that the guest is in a hurry: | How to react to match the sense of urgency |
|---|---|
| • Rapid or hurried movements, such as fast walking or quickly scanning the surroundings.<br>• Frequent glances at a watch or checking a phone for the time.<br>• Tapping fingers, shifting weight from foot to foot, or other signs of restlessness.<br>• Short and to-the-point answers to questions without much elaboration.<br>• Constantly checking a phone, is often accompanied by a sense of urgency in doing so.<br>• Scanning the environment with a sense of impatience, perhaps looking for queues or shortcuts.<br>• Easily distracted or looking away during a conversation, indicating a divided focus.<br>• Using verbal cues such as "I'm in a hurry" or "I have a meeting soon" explicitly communicate their time constraints.<br>• Obvious actions like checking a watch or looking at a clock on the wall can be strong indicators. | • Open the interaction by acknowledging the customer's time sensitivity, for example, "I notice you're in a hurry..."<br>• Apologize for any potential delays and assure them of prioritized service.<br>• Move swiftly and communicate with clarity to expedite the service process.<br>• Prioritize the preparation and delivery, providing timely updates on progress.<br>• Offer necessary documentation promptly, whether it's a bill, claim ticket, or order summary.<br>• Keep conversation concise unless initiated by the customer to respect their time.<br>• Limit suggestions and upsell to essentials, facilitating quicker decision-making for the customer.<br>• Thank the customer sincerely and efficiently for choosing your service.<br>• Say goodbye and offer swift assistance with any belongings or relevant items. |

| Indications that the customer is at a slow pace | How to react to match the sense relaxation |
|---|---|
| • Move slowly, taking their time without any sense of urgency.<br>• They spend a considerable amount of time browsing or exploring products or services.<br>• Exhibits relaxed and unhurried body language, such as slow gestures and calm posture.<br>• They linger in the establishment for an extended period without rushing.<br>• They are open to and engage in leisurely conversations with staff or fellow customers; ask detailed questions or seek additional information without a time constraint.<br>• They look like they are enjoying the ambiance or surroundings without a rushed demeanor.<br>• There are no visible signs of impatience, such as tapping fingers or checking the time frequently.<br>• They casually browse through items or services without a specific agenda or urgency and place orders at a comfortable and unhurried pace. | • Mirror their relaxed demeanor and movements to create a comfortable and harmonious interaction.<br>• Remain calm and composed in your interactions.<br>• Speak in a measured and unhurried tone to convey a sense of relaxation. Be mindful of personal space and avoid crowding or rushing the customer. Provide them with the time and space they need to explore or make decisions.<br>• Refrain from using rushed or high-energy language. Speak clearly and at a moderate pace, ensuring your communication aligns with the customer's leisurely atmosphere.<br>• If the customer is engaging in detailed inquiries, provide additional information and insights without rushing. Be prepared to share knowledge about products or services at a comfortable pace.<br>• Be attentive to their needs without being overly intrusive. Offer assistance when it seems appropriate, and let them guide the pace of the interaction. This may involve a slower presentation of options or allowing them ample time to make decisions. |

Our **Coffee Shop** is definitely seeing both styles, with more accent on the fast-paced side of the operations. Here is what they capture at this point:

| Touchpoint | Current state | Desired State |
|---|---|---|
| The Timeliness | Everything is fast and faster. We keep the same rhythm in the slow afternoons as it comes so naturally after an agitated morning. | We will observe the guest cues to match the sense of urgency or relaxation |

**How does your business address this touchpoint? Dedicate a few moments to think about it and write down ideas.**

## *7. The Complaint and The Recovery*

### the Non-Ideal Customer

I visited a neighborhood bakery on a Sunday morning to buy my favorite apple pie. The ladies at the counter were in good spirits, which is always appreciated. After placing my order and during the payment process, a gentleman entered and responded to the lady's greetings with,

*"I am here for the order."*

*"Sure,"* she responded, *"which order?"*

*"The order that my wife placed two days ago!" said* the gentleman, already a bit irritated at having to answer questions.

*"I understand. What was the order for?"* continued the lady from behind the counter.

*"For the party this afternoon!"* he replied, growing impatient.

*"Okay,"* the lady continued, summoning more patience, *"can you please tell me the name of the order or describe the product? Is it a cake or a pastry selection?"*

*"It's a cake, of course,"* he answered, now visibly bothered. *"I already said it's for the party!"*

Unfortunately, the initial positive atmosphere dissipated, turning what was supposed to be a short, cheerful interaction into the challenging task of identifying a cake and spreading frustration. They quickly resolved the situation after this, and the gentleman hurriedly left with his cake before I even finished paying.

**But was that really necessary?**

I understand that if the lady had asked the right questions, everything could have been simpler. However, walking into a neighborhood bakery with such entitlement and a mood-breaking attitude seems unnecessary.

I can't help but wonder how many similar transactions occur daily and how they impact the genuine service employees. And I know the answer is many! Numerous service interactions resemble the one I witnessed, a reaction-to-reaction snowball effect that destroys all positivity.

This is another reason why service employees need training,

***to learn how to deal with difficult clients professionally, benefiting both their mental well-being and customer satisfaction.***

Relying solely on spontaneity and common sense has proven to be very inefficient, especially in the service industry, where the number of variables impacting the quality of a transaction (or the authenticity of an interaction) is significantly high.

Let's start by acknowledging, loud and clear, that not all customers are exemplary. Having spent considerable time in the service industry, most of us tend to recall the negative interactions more prominently. I fully relate to this saying:

## "The guest is king
### as long as they
## behave royally."

This means that serving involves a reciprocal relationship, where both the provider and the customer contribute to shaping a positive experience. As a service employee, distinguishing between **UNPOLISHED REACTIONS** and **PROFESSIONAL CONDUCT**, regardless of the customer's unreasonable behavior, has a significant impact on the outcome of an interaction.

Learning and implementing appropriate steps, choosing words carefully, and incorporating non-verbal elements have the capacity to transform a complaint into an opportunity and disappointment into loyalty. It's essential to recognize that not all customers are ideal, and I'd like to share some difficult behaviors I encountered *(with focus on the actions and behaviors, not the person):*

- ✓ Finding faults in almost everything and tending to express dissatisfaction even with minor issues.
- ✓ Always expecting immediate and often unrealistic service, demanding attention and priority over others or anything else.
- ✓ Showing little interest in explanations or assistance, often dismissing suggestions or solutions without consideration.
- ✓ Consistently trying to negotiate prices or ask for discounts, even in situations where it's not appropriate.
- ✓ Displaying a lack of tolerance for waiting and seeking instant solutions, often expressing frustration if things take time.
- ✓ Struggling to make decisions, leads to prolonged interactions and potential dissatisfaction with the final choice.
- ✓ Obsessing on minor details and insignificant flaws, making it challenging to meet their expectations.
- ✓ Rarely expressing concerns or feedback directly but leaving negative reviews or feedback anonymously.
- ✓ Pushing the limits of policies and rules, attempting to see how much they can get away with or bend the established guidelines.
- ✓ Craving constant attention, often making excessive demands or creating drama to be the center of focus.

Dealing with challenging customer behaviors requires patience, empathy, and effective communication to find solutions and maintain a positive customer service experience.

Nonetheless, there are certain customer behaviors that I would never advise a service professional to endure or tolerate. Unless the employees are adequately trained to handle these situations professionally, the recommended course of action would be to disengage and promptly contact someone who can address the issue, such as a supervisor, manager, or, if necessary, the police.

- ✓ Any form of verbal aggression, offensive language, or disrespectful communication towards service staff is unacceptable.
- ✓ Harassment. Engaging in any form of persistent and unwarranted behavior that causes discomfort, fear, or distress to service employees.

- ✓ Intentionally refusing to pay for goods or services that were provided as agreed upon is considered unacceptable.
- ✓ Providing false information, attempting to deceive, or engaging in fraudulent activities during transactions or interactions.
- ✓ Willfully damaging physical property, equipment, or facilities associated with the service provider is completely unacceptable.

Such behaviors must be handled promptly and professionally while maintaining a focus on resolving the situation and ensuring the safety and well-being of both customers and service staff.

As the owner of a medium or small customer-facing business,

**you bear the responsibility of ensuring the physical and emotional safety of all employees.**

You need to establish a shared understanding when addressing unacceptable behavior in the workplace, whether exhibited by colleagues or customers. This commitment extends impartially to individuals regardless of their social status, wealth, or influence.

And that common understanding is: **THIS BEHAVIOR IS UNACCEPTABLE**, there are no gray areas, as long as the employee did nothing intentional to trigger the situation. And even if they did, this will be addressed soon after, in private, but the priority should be protecting your employees.

Here are some examples of reactions in case of dealing with a difficult customer:

- ➢ Maintain your composure and remain calm, this will help de-escalate the situation.
- ➢ Allow the customer to express their concerns fully by actively listening without interrupting. If this happens in a loud voice in front of other customers, suggest a more private area where you can discuss.
- ➢ Demonstrate empathy by acknowledging their frustration: "I understand this is frustrating for you."
- ➢ Refrain from arguing or engaging in confrontational behavior. Instead, focus on finding a resolution.
- ➢ Ensure a safe physical distance if the customer's aggression becomes threatening. Maintain personal safety.
- ➢ Show willingness to assist through positive body language, such as maintaining eye contact and using open gestures.
- ➢ Propose solutions to address their concerns. Present options that may help resolve the issue at hand.
- ➢ If the situation escalates, involve a higher authority, such as a manager or supervisor, to provide additional support.
- ➢ Clearly communicate acceptable behavior boundaries. Politely but firmly let the customer know that aggressive behavior is not tolerated.
- ➢ If the situation poses a threat or becomes uncontrollable, seek assistance from security, law enforcement, or other appropriate authorities.

If the employee has made every effort to professionally handle the situation, and offered options, refunds, and replacements, but the customer does not seem to like any of the compromises, you may have to accept that their needs do not align with your business values. In such cases, you can even invite clients to seek services elsewhere or refer them to other business owners in the industry.

## The Complaint as an Opportunity

When I initially received this piece of advice, the notion of seeing each complaint as an opportunity was quite frustrating. Dealing with the negativity from an unhappy customer already posed a significant challenge. It felt like being scolded in front of the class, with a clear enumeration of my shortcomings. I often found myself lacking the authority to provide compensation and feeling inexperienced in finding suitable solutions.

***After numerous complaints, I eventually came to the realization that it's not about me! Why was I taking it so personally?***

The intensity of a complaint is determined by the emotional involvement of the customer. It may involve a seemingly small issue, magnified dramatically by the customer, necessitating more emotional care and a straightforward resolution. Alternatively, it could be a substantial mistake on our part, with a customer who is hesitant to complain but seeks collaboration with the employee to find a resolution.

### How can complaints be opportunities?

- A complaint provides valuable feedback on areas where your business can improve. Use it as an opportunity to identify weaknesses and enhance your products or services.
- Addressing a complaint promptly and effectively can strengthen your relationship with the customer. This can also turn a dissatisfied customer into a loyal one.
- Multiple similar complaints may indicate a pattern and by proactively addressing underlying issues you can prevent future complaints.
- Complaints challenge your team to think creatively and come up with innovative solutions. This process can lead to the development of new features or services.
- Handling complaints responsibly demonstrates accountability. Customers appreciate businesses that take responsibility for their mistakes and work towards resolution.
- Complaints may highlight deficiencies in your policies or procedures. Use this insight to refine and strengthen internal processes to prevent similar issues in the future.
- Turning a complaint into a positive experience offers an opportunity for upselling. Offering additional services or products as a gesture of goodwill can lead to increased customer satisfaction.
- Effectively resolving complaints showcases your commitment to customer satisfaction. This customer-centric approach can attract new customers who appreciate a business that values customer feedback.

Viewing complaints as opportunities rather than setbacks allows businesses to learn, grow, and continuously improve their offerings and customer experiences.

I am not one to complain frequently, rarely expressing my dissatisfaction or posting online reviews, whether positive or critical, unless specifically asked to. The last time I did voice a complaint, it was due to such significant disappointment and poor handling that I felt betrayed for days afterwards.

*My husband and I were excited to try a casual vegan restaurant in our new city, having noticed it while walking down the street. Out of curiosity, I read about it online and checked the reviews – 400+ reviews with a score of 4.5. My expectations were elevated by this online reputation.*

*Upon reaching the location, the lady server, while diligently cleaning tables, informed us about the ordering system – we would check the menu and then order inside at the counter. Though I expected a greeting from her, I, as I often do (wrongly), lowered my expectations for the service and moved on. We decided on two different burgers with fries, paid (with 15% upfront tips included), and sat at a table outside. Surprisingly fast, we received our plates, and both burgers looked good.*

*Hungry, we started to eat, attempting to define the taste and experience through eye contact. My husband usually teases me that I don't know how to enjoy food, suggesting that I only eat because I am hungry, regardless of the combination, temperature, or whether I am standing or sitting.*

*And he is right actually but despite this, as I was eating the burger, I stopped to realize that the vegetables were cold, the patty was partially frozen, and the fries were fried a few days ago. I instantly felt disrespected.*

*My husband said, "I tried, but I cannot eat this." So, I took the plates back to the counter and told the lady server, in a low voice so as not to disturb the customers inside, that the burgers were inedible – cold and uncooked, and the potatoes tasted as if they were fried days ago.*

*With a look on her face that I translated as "And what am I supposed to do now?" she responded, "But you know they are vegan, right?"* 😮 *as if to suggest that perhaps the vegan nature of the dishes was why we did not like them; "and I can reheat the potatoes if you don't like them."*

*That was the end of the story, and I waited for an apology, for a suggestion, for anything, only to see a blank, uncomfortable stare. We left at that moment, and I regret even now that I did not ask for my money back.*

Unfortunately, many interactions resemble this one in various service industries, and no customer deserves this type of treatment. Let's explore the most basic way to handle a complaint and apply it to the story I shared, once again proving that everything comes naturally when service professionals respect and care for the customer's experience:

### THE COMPLAINT

The quality of the *food (burgers were inedible – cold and uncooked, and the potatoes tasted as if they were fried days ago)* – with no interpretation of "I just don't like the taste, it's not my favorite," but real, visible preparation mistakes that make it inedible.

### EXPECTED BEHAVIORS:

- **Listen**: eye contact, nodding, stopping from other activities, looking at the food I am sending back.

- **Empathize:** mirroring my emotions (disgust, disappointment); using classical phrases such as: "I would be disappointed too," "I would not like my burger cold either".
- Immediately **apologize**: instead of blaming the original vegan nature of the meal or giving any explanation, a sincere "I am sorry for this," "I apologize" would have stopped the escalation of my disappointment and the feeling of disrespect.
- **Provide solutions**: the list here is long if the care for the customer is genuine:
    - "We can remake the order, in only 10 minutes, would that work for you?";
    - "Do you want to choose anything else from the menu, we will carefully prepare it for you!";
    - "Let me refund you for this!";
    - "Let me offer another round of drinks on the house for this incident.";
    - "Here is a voucher for two free drinks when you visit next time!";

I know that, in small and medium businesses, service employees are often afraid of making such "costly" decisions, as they are not empowered to compensate due to budget constraints. But is it worth losing a customer altogether, especially in a niche business like a vegan restaurant, and indirectly losing eight others at the same time (because I did share the unpleasant experience with all my friends)?

***Or is it more cost-effective to train service representatives on how to behave in such situations and how to adequately compensate?***

To summarize the basic steps of handling a complaint, here are some examples:

### Active listening (observable actions)

- Maintaining consistent and appropriate eye contact signals attentiveness and engagement.
- Periodic nods indicate understanding and acknowledgment of the speaker's message.
- Allowing the speaker to express themselves without frequent interruptions demonstrates respect and active listening.
- Subtly mirroring the speaker's body language can foster a sense of connection and understanding.
- Responding with statements that reflect an understanding of the speaker's emotions or key points shows active engagement.
- Periodically summarizing or paraphrasing the speaker's main points demonstrates comprehension and engagement.
- Seeking clarification on specific points shows a genuine interest in understanding the speaker's perspective.
- Minimizing external distractions, such as checking phones or glancing at surroundings, ensures full attention on the speaker.
- Offering feedback or affirmations, such as "I see," "I understand," or "That makes sense," reinforces active listening.
- Withholding judgment until the speaker has fully expressed themselves fosters an open and supportive communication environment.

## Showing Empathy

Empathy is the ability to understand and share the feelings of others, demonstrating compassion, sensitivity, and a genuine concern for their well-being.  In managing a complaint, utilizing this skill correctly can determine the course of action.

**Insincere expressions of empathy can do more harm than good.**

*Once, a courteous male receptionist, faced with a young mother appearing uncomfortable, agitated, and almost in pain, who requested a private room for breastfeeding, opted to employ his empathy skills, stating (with all good intentions, of course), "**I completely understand how uncomfortable that feels; let me find a room for you**." Unfortunately, this managed to upset the lady.*

If no relatable feeling arises, it's better to state the obvious and acknowledge the feelings by saying: "I can see that you are uncomfortable, disappointed, upset, in a hurry, frustrated, sad, angry… allow me to find a solution right away.

**Below you can find more examples of how you can verbally express empathy:**

*"I understand how that could be frustrating for you."*
*"It must be challenging for you, and I appreciate your patience."*
*"I can imagine how that might make you feel, and I'm here to help."*
*"Your concerns are important, and I want to make sure we address them."*
*"I can see why you feel that way, and I want to find a solution."*
*"Thank you for bringing this to our attention; we want to make it right."*

- ✓ **Hotel room issues:** "If I would have to deal with a noisy room, I would also feel frustrated. Allow me to address this promptly and provide you with a quieter accommodation."
- ✓ **Restaurant order mistake:** "If I would have to receive the wrong order, I would also feel disappointed. Allow me to rectify this mistake and bring you the correct dish."
- ✓ **Retail product defect:** "If I would receive a defective product, I would also feel upset. Allow me to arrange for a replacement or refund to make things right."
- ✓ **Flight delay:** "If I had to endure a flight delay, I would also feel inconvenienced. Allow me to keep you informed and assist with any necessary adjustments to your plans."
- ✓ **Gym equipment malfunction:** "If my favorite equipment would not be available, I would also feel annoyed. Allow me to address this issue promptly and offer alternatives."
- ✓ **Salon appointment rescheduling:** "If I had to reschedule my appointment last minute, I would also feel stressed. Allow me to find a suitable alternative time for you."

## Apologizing

Apologizing shows that you recognize and acknowledge the customer's concern or issue. It validates their feelings and experiences, demonstrating that their feedback is taken seriously.

Customers are more likely to stay loyal to a business that acknowledges mistakes and takes steps to rectify them. Apologizing is a key component of resolving conflicts. It opens the door for further communication and collaboration towards finding a solution.

Nothing more, and nothing less than: **"I am sorry for this situation**", "I apologize for this mistake!" but with much care to the nuances of the language, avoiding the sympathy sharing "I am sorry for you", or the indifferent "Sorry!"

There are also **NO-APOLOGY** sensitive situations that a service professional should be aware of – for example, in case of a complaint when the customer claims food poisoning, or theft on property, apologizing means admitting the fault and it attracts legal implications. This is the case where we show regret for the dissatisfaction but do not take responsibility until a real investigation has clarified the facts.

**Here are some other examples where the apology needs to be treated differently:**

- ✓ If admitting fault could have legal implications or jeopardize the company's legal position, a service professional may need to choose their words carefully. Instead of apologizing, they can express regret for any inconvenience or dissatisfaction without admitting to an alleged fault.
- ✓ If the customer's complaint is related to a policy or procedure that the company cannot or should not change, apologizing may not be appropriate. In such cases, the service professional can explain the policy respectfully and offer alternative solutions or assistance within the framework of the policy.
- ✓ If the customer's complaint is based on a misunderstanding or miscommunication, apologizing for the confusion may be more suitable than assuming fault. Clarifying the situation and offering assistance can be more effective.
- ✓ If a customer frequently raises similar complaints without clear merit, a service professional may need to address the issue diplomatically without offering a repeated apology. They can express a commitment to addressing concerns while investigating any patterns in the complaints.
- ✓ In situations involving potential safety or security concerns, an immediate apology may not be appropriate. The focus should be on ensuring the well-being of the customer and resolving the issue promptly.
- ✓ If the complaint involves a third party or external factor beyond the control of the company or its employees, a straightforward apology may not work. Instead, the service professional can express regret for the impact and offer assistance within their scope of influence.

### Providing solutions

Being the expert in your business, the customer counts on you to find the best solution to the complaint. If the previous steps have the role of creating an open channel of communication and setting the ground for problem resolution, this final step can turn this complaint into a positive chance to bring the client to satisfaction.

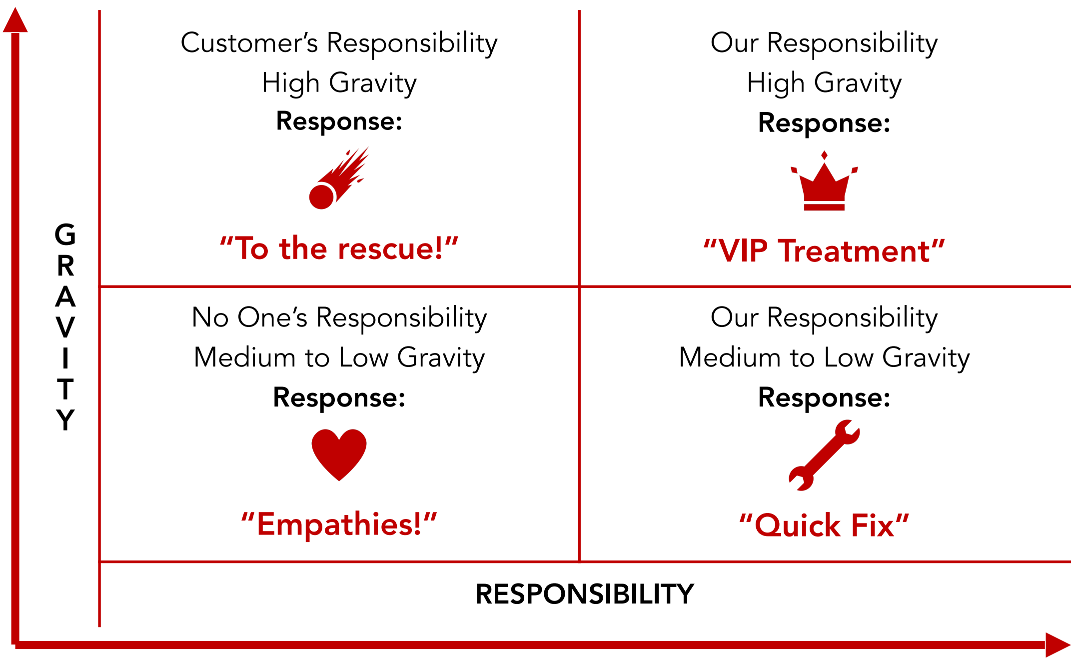
**Here are some expected actions:**

- ✓ Offering the customer a range of viable options for resolving the issue. Choices empower the customer and demonstrate flexibility on the part of the service provider. Be clear about the available solutions and their potential outcomes.
- ✓ Encouraging the customer to express their preferences among the offered solutions. This ensures that the resolution aligns with their expectations and needs. For instance, you can say, "I've outlined a few options to address this. Which one would you prefer?"
- ✓ Once the customer has selected a preferred solution, initiate the necessary actions promptly. If the solution requires time or additional steps, provide a realistic timeframe and keep the customer informed about the progress.
- ✓ Depending on the nature and severity of the issue, consider offering compensation as a goodwill gesture. This could be a discount, a free product or service, or any other form of compensation that aligns with the customer's expectations.

## The Service Recovery

When handling complaints, there is one tool we can use to better help us chose the right solution adapted to the specific situation we are facing. There are two main indicators we need to clearly assess, before we take any decision on the level of reaction, compensation, and problem resolution:

**Responsibility** *(whose fault is it for what happened, who is responsible for creating the undesired situation?)*
**Gravity** *(how severe is the situation on terms of consequences, damage and loss for the customer?)*




Let's take a few practical examples of assessing the responsibility and the gravity of the situation and the solutions we could offer:

**Car Rental Service - Complaint:** *"I filled the car with a full tank of the wrong fuel, and now it won't start. I really need to reach a very important meeting in one hour!"*

**Customer's Responsibility, High Gravity - To the rescue!**

Although this situation was not created by your team, in any way, seeing it as an opportunity to help the customer is the best course of action. As no matter what you do to bring this client to his important meeting, will make you, his hero!

Acknowledging the urgency and gravity of the situation, the focus should be on providing immediate assistance and options for resolution. However, applying this response when with the risk of compromising many resources and bringing unnecessary struggle to the team, would not be the right course of actions and, on top of this, the you can create a precedent for further similar situations.

***"I understand the urgency, and I'm sorry to hear about the situation. Let me check what we can do to get you back on the road as quickly as possible. We'll arrange for a tow truck to bring the car to our service station.***

***While we work on resolving the issue, I can arrange a temporary replacement vehicle for you to ensure you make it to your important meeting on time.***

***We'll handle the fueling situation at our service station. Your safety and reaching your meeting are our top priorities, and we appreciate your understanding."***

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**Beauty Salon - Complaint**: *"The hair color treatment at your salon did not match the shade I requested; the result is far from what I expected. It affected my confidence at work today!"*

**Our Responsibility, High Gravity - VIP Treatment**

Being your team's fault entirely (using, by mistake, the wrong tube of color), the arsenal of solutions has to be rich, to bring the customer back to a satisfactory state. No compromise should be made here to recover the client, pull out the red carpet and apply the VIP treatment in this situation. Expressing sincere apologies and taking responsibility for the outcome is the best start in this case:

***"I sincerely apologize for the what you have experienced with the hair color treatment.***

***We value your satisfaction, and I'm truly sorry that we fell short of your expectations. To address this issue, we would be more than happy to schedule a complimentary follow-up appointment immediately to correct the color to your desired shade.***

***During your next visit, we can have a more detailed consultation to ensure we fully understand your preferences. And we would be happy to offer you a voucher for a free facial treatment next month! Your feedback is invaluable, and we are committed to making it right for you.***

***Thank you for bringing this to our attention, and we appreciate your understanding."***

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**Coffee Shop - Complaint:** *"I ordered a latte, but it was served with the wrong milk."*

**Our Responsibility, Medium to Low Gravity - Quick Fix**

These are the types of complaints that have the highest rate of recovery, given a correct and immediate response. Sincerely apologizing, offering a quick replacement and a small compensation for the inconvenience would restore the balance.

***"I'm sorry for the mix-up with your latte. Thank you for bringing it to our attention. Let me quickly prepare a new one for you with the correct milk.***

***Would that be alright? Allow me to offer you a pastry of your choice, from the displayed selection, at no additional cost to make up for the inconvenience."***

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**Café - Complaint**: *"I wanted to enjoy my coffee in the outdoor seating area, but it's too hot outside, even in the shade"*

**No One's Responsibility, Medium to Low Gravity - Show empathy!**

Nothing but showing empathy then offering suggestions (in this order) is needed in this kind of situation (another example could be: *"I had a whole trip planned in the city center but outside is raining today!"*)

***"I understand, it's a particularly hot day, it must be uncomfortable! May I suggest this cozy table by the window, inside, where it's cooler from the AC? Would you like an Iced Coffee instead?",***

***"May I offer to put the coffee to go so maybe you can enjoy it in the park nearby where it could be a little bit cooler?"***

We could, however, add unnecessary tension if we ignore or skip this evaluation point, a correct framing of the situation we have in front.

**The two extremes could be:**

- ➢ **minimizing the problem** *(like offering only our deepest empathy, in a case where it's obviously our fault and the impact on the customer is high),* hastily jumping to suggestions without expressing empathy, or denying responsibility with statements like "Sorry, it's not our fault, we cannot help you with that!".
- ➢ **exacerbating the issue,** leading to unnecessary overcompensation when clearly, it's no one's fault and the impact is low (it's raining outside and the customer is complaining that they need to cancel the tour of the city they had planned, offering a free indoor massage at the spa is excessive, offering indoor alternative after empathizing is just right).

Learning to find a balanced approach ensures a thoughtful and effective resolution that aligns with the customer's needs and the situation at hand.

As the Kick-Off Event continues at our study case **Coffee Shop**, Olivia, the facilitator, will take the team through a brief analysis of their complaints handling skills.

| Touchpoint | Current state | Desired State |
|---|---|---|
| The Complaint<br>and<br>The Recovery | **What kind of complaints do we receive at our Coffee Shop?**<br>• The waiting time is too long;<br>• The customer received the wrong order (wrong type of milk);<br>• The Background music is too loud;<br>• The coffee tastes burnt;<br>• The WiFi is slow;<br>• Not enough vegan options;<br>**How do we respond?**<br>• We try to quickly fix them all, so we can move on to the next customer.<br>• If there is nothing we can do, we say just that and apologize.<br>• We don't pay too much attention to the complaints, there are many customers, all the time. | We will practice active listening, show empathy, apologize, and then offer suggestions or solutions, doing all in our power to help the customer leave happy and come back.<br>We will quickly assess Responsibility and Gravity to apply the correct level of reaction and make sure each guest is recovered.<br>We will document all complaints to monitor trends, improve physical aspects of the location, improve the service, and maintain the quality of the products. |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

## *8. The "Going the Extra Mile"*

Can small and medium businesses embrace the idea of "going the extra mile"? Is there time or budget for it? By simplifying this concept and customizing it for non-luxury, customer-focused small businesses, the advantages of simple gestures, rooted in genuine care for the client, can outweigh any perceived costs or investments for the owner.

### The FEAR of setting higher expectations

The fear of setting higher expectations by going the extra mile is a valid concern that many business owners and direct service employees struggle with. While the benefits of exceptional customer service are evident, there are understandable concerns about the potential consequences of consistently doing more than anticipated.

- Small businesses often operate with limited resources of time, budget, employees, the worry that consistently going above and beyond may create expectations that are challenging to sustain on long term, is understandable.
- Setting the bar too high could lead to occasional lapses in service quality, potentially disappointing customers who have come to expect exceptional treatment.

- ➢ Going the extra mile may cultivate a sense of entitlement among customers. Consistently exceeding expectations might lead customers to expect such treatment as the norm, making it challenging to deliver.
- ➢ In highly competitive markets, there is a fear that setting higher expectations may force competitors to do the same, escalating the level of service required to remain competitive.
- ➢ Small businesses owners may worry that going above and beyond could strain their operational efficiency. Meeting higher expectations might require additional effort, time, or personnel, potentially impacting the smooth functioning of the business.

## The BENEFITS of going the extra mile

This gesture of added value sends a clear message: we appreciate you, therefore we put the extra effort to show it to you through small actions of anticipation, surprise and care. What can this emotional connection bring:

- ➢ Loyalty, everyone appreciates businesses that demonstrate genuine care and personalization.
- ➢ Organic, word-of-mouth marketing, "I felt appreciated while doing business, buying, using the services of this company" it's a powerful statement to encourage new clients to try.
- ➢ Businesses that stand out by providing exceptional service will differentiate themselves from competitors and make it difficult for them to catch up.
- ➢ Happy customers are more likely to become repeat customers and a loyal customer base that returns for future purchases will steadily sustain your business growth.
- ➢ Satisfied customers are inclined to leave positive reviews online, which can enhance the online reputation and attract new clients.
- ➢ Going the extra mile doesn't necessarily require significant financial investments. It can involve personalized communication, prompt responses, creativity, or thoughtful gestures that don't require a budget.
- ➢ Small businesses that consistently go above and beyond in customer service develop a positive brand image, creating a favorable perception in the minds of consumers.

By simplifying the concept and focusing on small gestures that reflect a genuine care for the client, small businesses can create meaningful and memorable experiences as well:

Here is a list of **thoughtful and free** gestures that would enhance the customer's experience across various industries.

- Using the customer's name in direct or written interactions;
- Offer assistance with directions or guidance;
- Leave handwritten notes expressing appreciation;
- Provide personalized tips or advice related to the customer's specific needs;
- Share insights about local events, attractions, and hidden gems that might interest the customer;
- Assist customers with their belongings, like holding doors or helping carry items;
- Show empathy during challenging situations, expressing understanding and support.
- Use inclusive language to make customers of different nationalities feel welcome and valued;
- Personalizing the service when the customer asks for changes, adjustments;
- Reserve seating for regular customers, giving them a sense of priority and recognition;

Here is a list of going the extra mile actions that may require a **minimum** to a **large investment**:

- Provide complimentary beverages or snacks, especially in waiting areas;
- Recognize and acknowledge special occasions such as birthdays or anniversaries;
- Occasionally extend operating hours to accommodate customers with tight schedules;
- Acknowledge and celebrate customer milestones, such as reaching a certain number of visits;
- Showcase eco-friendly practices, appealing to environmentally conscious customers;
- Offer small toys or coloring sheets for families with children to make their visit more enjoyable;
- Organize occasional events or gatherings to show appreciation for loyal customers;
- Provide complimentary samples or add-ons to enhance the customer's purchase;
- Establish a simple loyalty program offering rewards for repeat business;

***How do you find the balance between the desire to go the extra mile and the fear of setting expectations too high?***

Through **clarity** and **transparency** in communicating what customers can expect, here are some examples:

➢ **Retail (e-commerce):** If an online retail store promises delivery within 3-5 business days, ensure that the logistics and shipping partners are capable of consistently meeting this timeframe. Avoid setting an unrealistic standard, like next-day delivery, if it's challenging to maintain consistently.

➢ **Hospitality (hotels):** Clearly communicate check-in and check-out times to guests. If standard check-in is at 3 PM, but rooms are often ready earlier, guests will be pleasantly surprised, enhancing their overall experience.

➢ **Coffee Shops (Cafés):** Clearly communicate portion sizes for menu items, avoiding the perception of oversized servings. Set realistic expectations for the waiting time for custom-made beverages during peak hours.

By setting **achievable expectations initially**, considering the capacity of your operations. When you exceed these expectations, customers are pleasantly surprised.

➢ **Automotive (car maintenance):** If your auto repair shop estimates that a repair will take a week, communicate a timeframe of 7-10 days. If the repair is completed within the initially communicated week, customers will appreciate the faster service.
➢ **Travel (tour operators):** If a tour company suggests a scenic tour lasting 2 hours, plan the itinerary for 30 minutes more. If the tour consistently concludes within the initially communicated timeframe, customers will feel they received extra value.
➢ **Healthcare (medical clinics):** Communicate a longer appointment timeframe to patients, allowing for potential delays. If the clinic consistently sees patients within the initially communicated time, patients will appreciate the efficiency.

While going the extra mile is a valuable tool in your strategy to offer notable good service, ensuring the consistency in the quality you provide is the actual priority. And this requires efforts too: investing in training, getting up to date with the technology, adapting to today's trends.

Let's apply this exercise further, with the **Coffee Shop** team, enjoying a Kick-Off Event for service transformation!

| Touchpoint | Current state | Desired State |
|---|---|---|
| Going the Extra Mile | What are some extra-mile gestures or actions we're spontaneously doing in our **Coffee Shop** now?<br><br>• We know some of the regulars and recognize them by saying "welcome back";<br>• For foamy drinks, we add a heart-shaped chocolate powder;<br>• We offer table service for busy customers;<br>• We interact with the small kids, pretending to take their orders and asking them about their likes and dislikes, to keep them entertained. | What other actions we can implement, with limited effort or cost?<br><br>• Recognizing the regular guests by their names, "Welcome back, Mary!"<br>• Complimenting the customer: for the choice of coffee, for the daring haircut, etc.<br>• Occasionally provide a complimentary upgrade to a larger coffee size for customers.<br>• Take a moment to engage in friendly conversation with customers, making them feel valued.<br>• Encourage sustainability by offering a discount to customers who bring their reusable cups, promoting eco-friendly practice<br>• Provide small toys or coloring sheets for families with children, making the coffee shop more welcoming for parents.<br>• Personalize the drink with Coffee Art when possible.<br>• Offer small, complimentary samples of new or popular pastries for customers to try. |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

# *9. The Payment, the Hot Feedback, the Farewell*

### The Payment

If everything requires an emotional investment when serving a customer, the payment could not be any different, even though this IS a simple transactional exchange!

Quite a few times I felt uncomfortable at the phase of the payment: I was either rushed as if the show was over and I no longer needed to be charmed, or had my hand forced to leave tips when the option was also to leave none (and not the intention was frustrating, the service professionals work hard and they deserve fair pay, but the tone, the words and the discrepancy between what they were asking and the quality of the service they provided!), the malfunction of the payment device, the lack of a breakdown on the receipt.

As part of closing the circle of excellent customer service, the payment should be simple, clear, and fast but not rushed, and used as an opportunity to have a joyful conversation or ask for hot feedback.

### The Hot Feedback

It gets its name from the fact that it's very close to the situation, thus very vivid in the customer's mind, it still carries the full emotional charge of the recent experience.

**Here are some questions that can be used:**

- *"How was your experience with us today?"*
- *"Is there anything specific that stood out to you during this visit?"*
- *"Did our team meet your expectations when serving you today?"*

It all goes back to reading the customer's cues and observing the emotional response that accompanies the words. Before introducing this element as a standard in your service commitment, it's important to confront **the fears behind asking for hot feedback** and learn how to address them.

››› One common fear is that customers might provide **NEGATIVE FEEDBACK,** highlighting aspects of the service that didn't meet their expectations. This fear is triggered by a poor capacity to deal with potential criticism or the perceived negative impact on the business's reputation. Accepting feedback as a valuable tool to identify areas that need enhancement and detaching the personal aspect of handling criticism, could help you collect some important insights.

››› Some service providers may fear that asking for feedback **MIGHT MAKE CUSTOMERS FEEL UNCOMFORTABLE OR PRESSURED**. There's a concern that customers may perceive the request as intrusive or that they may not want to share their opinions openly. Clearly telling them that we welcome any type of feedback, and supporting this affirmation with the right non-verbal messages, could be encouraging and reliving.

››› **SELECTING AN APPROPRIATE MOMENT** to ask for feedback, ensuring it doesn't interrupt the customer's experience, for example, after completing the payment transaction. Using open-ended questions would allow customers to share as much or as little as they are comfortable with.

»» There's a fear that actively seeking feedback **MAY UNCOVER EXISTING ISSUES** or shortcomings in the service delivery and this is based on the anticipation of having to address challenges or make improvements, which require extra effort that you are not willing to invest. It's only fair to recognize that every business has areas for improvement, being proactive about it by openly receiving feedback from the customer, can only bring you one step ahead!

## The Farewell

Without overcomplicating the "Goodbye", it's important to remember that this is the last impression that stays with the customer after the event. And it includes a few mandatory aspects, depending on the time at hand and the level of personalization your business offers.

**Here are some actions that can be added to the farewell phrase:**

- Inform customers about any ongoing discounts, promotions, or loyalty programs.
- Offering further assistance: "Is there anything else I can assist you with?" this sends the message that you proactively offer to help by showing your commitment to their needs.
- Encourage customers to share their experiences online and to leave reviews on specific platforms: "Share your experience! Leave a quick review on Google, my name is Mary and I was happy to assist you today!" "Love our service? Let others know on Google, that my name is John and I was your stylist today!".
- Thanking the customer for choosing your salon, restaurant, service, etc. If your personalization allows use their name when you know it (you can see it on the credit card during payment).
- Use a personalized wish or greeting if you know details about the customer (Have a good meeting! Have a great jogging session! Enjoy your vacation! See you early tomorrow morning, as usual!) or just a simple "Have a great day!".

The **Coffee Shop** meeting is going just great, slowly the team is creating a desired state for their new approach to customer service:

| Touchpoint | Current state | Desired State |
|---|---|---|
| the Payment<br><br>the Hot Feedback<br><br>the Farewell | • The payment goes very fast, mostly quiet.<br><br>• We sometimes see the client is not happy but the queue is long so there is no time to investigate.<br><br>• And many times, instead of ***"Goodbye"*** we say ***"Next!"*** as if both us and the customer are already focusing on the next move. | • We keep the payment simple and fast.<br><br>• If the customer takes a ToGo and they are not regular we can wish them ***"Enjoy your coffee!"*** and we know what they ordered so we will say ***"Enjoy your cappuccino/ espresso/ americano!"***<br><br>• If the customer had their coffee at our place, we ask ***"How was your experience with us today?"***<br><br>• If the customer is a regular, we will learn and use the name and personalize the farewell.<br><br>• We will say ***"Thank You"*** to each one of the customers. |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

When customers leave happy, it's like a boost of energy for the service team.

Positive feedback makes the team feel good about what they're doing, creating a friendly and motivating work atmosphere. Knowing they've made customers happy not only gives them a sense of achievement but also inspires them to get even better at their jobs.

It's a win-win – happy customers and a happy, engaged team working together to make things awesome!

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***We can consider that the customer's journey has successfully ended and all we can say is "Another happy customer, looking forward to welcoming them back!"***

# Simplified Luxury Behaviors

The following instruments, however optional, bring high value to small and medium, customer-facing businesses, exactly because they are optional and not chosen by many owners. They do require more work, commitment, human resources, time, and sometimes money but for a business owner who truly values the customers, understands the power of loyalty, and wants to stand out, these tools become a powerful, necessary differentiator.

Simplified luxury behaviors mean, ***taking small or big 5* instruments and actions and uncomplicating them,*** adapting them to small businesses in a multitude of service industries.

The Formal Feedback
The Customer Profile & Personalization

1. The Below, Meeting, Exceeding Expectations
2. The Smile
3. The Name
4. A minute!
5. from No Problem! to My Pleasure!
6. Be Proactive!
7. The "No, But…"
8. Anticipating Needs
9. Asking Questions

## *The Formal Feedback*

Establishing a formal feedback system requires a significant commitment from the team, aligning with the continuous improvement mentality that makes businesses thrive.

The process also demands time and potentially financial resources, which many owners may not allocate. Consequently, medium and small businesses often rely on social media and online review platforms for feedback.

***The difference between a formal feedback system and the spontaneity of online reviews lies in having the option to selectively focus on specific areas for improvement when there is a formal system in place.***

The effort behind a feedback system involves activities such as sending surveys, monitoring, extracting trends, formulating responses, implementing changes, conducting customer follow-ups, and providing compensation when necessary.

Creating online surveys and questionnaires is now very easy, free, and user-friendly.

**Here are three easy steps to self-design and implement formal feedback** surveys *(the alternative, of course, implying less effort but more money, is investing in a third party's services of designing, applying, and centralizing the results of a formal customer satisfaction assessment):*

- ✓ Clearly outline the objectives of the feedback collection. What specific aspects of your products, services, or customer experience do you want to assess?
- ✓ Select user-friendly survey tools that match your business needs and budget. Options include Google Forms, SurveyMonkey, Typeform, or other online survey platforms.
- ✓ Customize the survey template or create questions that align with your defined objectives.
- ✓ Ensure the survey is easy to navigate, with a mix of multiple-choice, rating scales, and open-ended questions for comprehensive verbalized suggestions.
- ✓ Clearly communicate the purpose of the survey to your customers, emphasizing the value of their feedback.
- ✓ Choose an appropriate time to send the survey, considering the customer's journey or recent interaction with your business.
- ✓ Once responses are collected, analyze the results to identify trends and areas for improvement.
- ✓ Act on the feedback by implementing necessary changes and communicate these improvements to your customers.
- ✓ Remember to keep the survey process simple and short, respectful of your customers' time, and focused on gathering actionable insights, regularly reviewing and update your surveys to ensure they remain relevant.

You and your team can brainstorm many ways to request formal feedback from the customer, here are three basic methods:

- sending personalized post-interaction emails requesting feedback, including the link to an online survey;
- sharing the link on your company's website and social media pages;
- create an inviting poster with a QR code that the customers can scan upon departure.

Formal feedback surveys provide a structured way to understand customer perspectives, weaknesses, and strengths, and adapting business strategies accordingly.

Simultaneously, the analysis of online reviews offers real-time insights into customer sentiments and trends.

> **The combination of formal feedback and online reviews empowers small businesses to adapt swiftly and build a resilient foundation for long-term partnerships with their audience.**

## *The Customer Profile*

Another valuable instrument, for creating a variety of personalization opportunities, building loyalty, and proactively solving problems is the Customer Profile.

Having this would allow you to gather and store essential information about individual customers, such as **SERVICE PREFERENCES**, **PURCHASE HISTORY, INCIDENTS, AND SPECIAL REQUESTS,** helping deliver better service. Your professionals can access relevant information quickly, allowing them to address inquiries, resolve issues, and provide individualized assistance with confidence.

By understanding customer preferences and behavior, you can design loyalty programs that offer rewards or incentives aligned with precise interests, encouraging repeat business. It provides valuable insights that inform strategic decision-making. Also understanding customer demographics and behavior enables you to create targeted and effective marketing campaigns.

If you are considering using a customer profile database, the ideal way forward is to opt for a professional database platform of CRM (Client Relationship Management) fitted to your industry and business size. This comes with all the other benefits of data protection, software updates, tools to centralize or segment the data, and simplified dashboards to help you analyze the content.

**Here is a basic version of a Customer Profile Structure for a Barber Shop:**

- ✓ *Personal details: (Name/preferred name, contact number, email address, date of birth)*
- ✓ *Preferred Barber:*
- ✓ *Preferred Haircut Style:*
- ✓ *Last Visit Date:*
- ✓ *Any Allergies or Sensitivities:*
- ✓ *Preferred Communication Method:*
- ✓ *Special Requests or Notes*:

**As the owner of the barbershop, you can use these details to:**

- memorize the phone number and name so you can recognize the customer and answer with ***"Good morning, Mark, how may I help you today?"*** when they book again;
- already assign them to their favorite barber and work around their schedules;
- reconfirming their visit purpose about the favorite haircut style and morning availability;
- personalize birthday wishes if the visit is around that date;
- recognize any special occasion with an extra touch (important event - special treatment);

…and so much more!

Speaking of personalized service in a barber shop reminds me of my husband's loyalty to his longtime barber - a relationship that was disrupted only by our necessity to relocate to another country.

His barber intuitively mastered the art of personalized service without the need for a formal customer profile. With natural charisma and attention to detail being a daily practice, it makes it very possible that in a smaller, independent neighborhood shop, such personalized interactions may come naturally.

In these intimate settings, where the magic of customer service is instinctively added to every interaction - smiles, personal greetings, genuine conversations, a familiarity with the preferences, and an authentic ***"Thank you, see you next time!"*** - a comprehensive customer profile seems unnecessary.

However, the story changes in slightly larger location, with diverse and increased clientele, appointment systems, and a commitment to improving service levels.

**In such cases, a well-maintained customer profile becomes indispensable.**

With a dedicated receptionist managing appointments and a commitment to a high-end experience, having a centralized database ensures that unique needs are not only met but exceeded. This detailed record becomes the key to consistency, allowing every team member to contribute to your satisfaction, creating a seamless and personalized journey.

## *1. Below - Meeting - Exceeding Expectations*

If the customer would have to describe in two words the service level you provided, what do you think they would choose:

**Below Expectations?**

**Meeting Expectations?**

**Exceeding Expectations?**

Given your interest in this guide, it is clear, to me, that you are currently meeting expectations, with occasional drops below, and are committed to preparing your team to consistently surpass them. Congratulations on this realization!

I don't plan to allocate too much time defining Below Expectations; however, we have to acknowledge its existence to better understand the others.

This level, marked by **consistent indifference, disregard for the customer, rude behavior, unnecessary bureaucracy, and prolonged waiting times**, unfortunately, persists in certain public sector service offices and low-quality businesses.

Consistently Meeting Expectations is the baseline for customer satisfaction and retention. Customers expect a certain standard of service, and meeting these expectations establishes a foundation of trust.

***But you need to admit that only meeting expectations might not be sufficient for sustained success.***

However, it is the minimum requirement to prevent customer dissatisfaction and maintain a stable customer base. Understanding the practical differentiation between these levels is the first step to adapting your strategy.

**Let's take a look at some examples to help us better interpret the distinction:**

**RESTAURANT: bringing a cup of coffee to the table**

**Below Expectations:** The server delivers a cup of coffee to the table with a noticeable spill and a lack of acknowledgment of the mistake. The customer's request for cream is ignored, and the server seems disinterested: ***"Coffee for you. Anything else?"***

**Meeting Expectations:** The server brings the cup of coffee to the table, addresses the customer politely, and provides cream and sugar as requested. Service is efficient but lacks personalization: ***"Here's your coffee. Enjoy! Cream and sugar are on the side. Let me know if you need anything else."***

**Exceeding Expectations:** The server not only delivers the coffee but also takes the time to introduce themselves, ask about the customer's preferences, and upsell a freshly baked pastry: "***I have your freshly brewed coffee. My name is Mary, what is yours? Mark, do you have any preferences for cream or sweeteners? And, in case you like pastries (who doesn't?) we just took the vanilla croissants out of the oven! Would you like to have one?"***

### RETAIL: Handing over the purchased goods

**Below Expectations:** The cashier hands over the purchased goods without a greeting, a smile, or any acknowledgment of the customer. The transaction feels rushed and cold: ***"Here you go!"***

**Meeting Expectations**: The cashier politely greets the customer, efficiently scans and bags the items, and thanks the customer for their purchase. It's a basic but polite transaction: ***"Thank you! Here are your items. Goodbye!"***

**Exceeding Expectations:** The cashier not only performs the transaction efficiently but also engages the customer in conversation. They express gratitude for the purchase, provide information about upcoming sales or promotions, and genuinely make the customer feel appreciated: ***"Thank you for shopping here today! Your items are all set. Did you know we have a special promotion starting next week? It's our way of saying thanks for being a valued customer."***

### HOSPITALITY (Hotel): Front desk check-in

**Below Expectations:** The front desk staff hands the room key to the guest without making eye contact, providing any information, or offering assistance with luggage. The check-in process feels impersonal: ***"Here's your room key. Elevators are to your right."***

**Meeting Expectations:** The front desk staff greets the guest warmly, provides necessary information about the hotel amenities, and hands over the room key with a smile. It's a friendly and efficient check-in experience: ***"Welcome! Your room is ready. Here's your key, and the elevators are to your right. If you need anything, feel free to ask. Enjoy your stay!"***

**Exceeding Expectations:** In addition to the standard check-in process, the staff goes above and beyond by offering assistance with luggage, providing recommendations for local attractions, and ensuring the guest feels genuinely welcomed and valued: ***"Welcome to our hotel (replace with the name of the hotel), Ms. Guest (use the name if you know it or ask for it!)! Your room is all set. Can I assist with your luggage? By the way, we have a list of recommended local attractions at the concierge desk. We hope***

***you have a fantastic stay, and if there's anything you need, my name is Mary, please don't hesitate to ask."***

## BOOKSTORE - Book recommendation

**Below Expectations:** The bookstore staff recommends a popular book without asking about the customer's reading preferences: ***"This book is popular right now. You might like it."***

**Meeting Expectations:** The staff asks about the customer's favorite genres and recommends a bestselling book in that category: ***"If you like mysteries, I recommend this bestseller. It's quite popular."***

**Exceeding Expectations:** The staff engages in a conversation about the customer's recent reads, understands their specific interests, and recommends a lesser-known gem, demonstrating a genuine passion for literature and creating a personalized and authentic book-buying experience: ***"I see you enjoy mysteries. Have you read any recent favorites? I have a lesser-known gem that's received fantastic reviews. It's not as popular but has a captivating plot. Would you like to check it out?"***

## RESTAURANT - Taking a reservation

**Below Expectations:** The restaurant staff takes a reservation without confirming details or offering any special arrangements: ***"Reservation for two at 7PM? Okay, it's noted."***

**Meeting Expectations:** The staff takes a reservation, confirms basic details, and ensures a table is available at the specified time: ***"Certainly, we have a table available for you at 7PM. Would you like any specific arrangements?"***

**Exceeding Expectations**: The staff not only takes a reservation but also asks if there's a special occasion, notes any dietary preferences, and arranges a personalized welcome, creating an authentic and hospitable dining experience: ***"Great! We have your reservation for 7PM. Is there a special occasion you're celebrating? Any dietary preferences we should be aware of? We'd love to make your evening extra special!"***

## PHARMACY - Assisting with a health inquiry

**Below Expectations:** The pharmacist provides a basic recommendation for an over-the-counter medication without asking about specific symptoms or medical history: ***"For your symptoms, you can try this over-the-counter medicine."***

**Meeting Expectations:** The pharmacist asks about the symptoms, suggests a common remedy, and provides usage information: ***"I see you're experiencing [symptoms]. This medication is commonly used for that. Here's how you can use it....".***

**Exceeding Expectations:** The pharmacist not only asks about symptoms but also the customer's medical history, suggests a tailored solution, and provides additional advice for managing health: ***"I want to ensure the best recommendation. Can you share more about your symptoms and any relevant medical history? Based on that, I recommend [medication], and here are some additional tips for managing your health."***

The mindset of always striving for the best version of what you do is not a given for all of us, on top of this, mediocrity is simpler, requires much less effort, and, for the customers that don't care too much, it counts as service. But is this something to be associated with?

Even more when the difference is made by a free act of caring? Look at some of your business-customer interactions through the lenses of below-meeting-exceeding expectations and judge for yourself!

## *2. The Smile*

Although already integrated into our Customer's Journey flow, I consider it necessary to bring more details on each of the tools in a service professional's toolkit. The better we understand the value, impact, and power each one holds, the faster we can start practicing and see the results in the daily operations.

Smiling is a universal expression of warmth and friendliness. While its interpretation may vary across cultures, the underlying positive sentiment is indisputable. In some cultures, a smile may signify shame, embarrassment, or lack of confidence but at a much larger scale, it transmits politeness, approachability, sincerity, or positivity making it a powerful instrument creating authentic service interactions.

As the first point of contact between a customer and a service provider, the smile can set the tone for a welcoming atmosphere, putting customers at ease, creating a positive impression, and starting a more meaningful connection. It can turn a mundane transaction into a pleasant collaboration, making customers feel valued and appreciated.

***Smiles can diffuse tense situations, ease customer concerns, and contribute to an overall pleasant dialogue.***

It goes beyond words, signaling a genuine interest in the customer's well-being; the smile is a simple yet potent element that can influence perceptions, loyalty, and the success of a business.

### When NOT to smile?

There may be situations where a smile might be inappropriate or misunderstood. Service professionals need to adapt to the context and the sensitivities of the customers. Here are a few scenarios where smiling may not be the first option:

- When addressing a serious issue, such as a customer complaint or an emergency, a constant smile may be perceived as insensitivity, these situations requiring empathy or resolution, maintaining a serious and attentive demeanor may be more appropriate.

- In some cultures, excessive smiling may be perceived as unprofessional or insincere. Service professionals need training on cultural differences to adjust their behavior accordingly.
- During formal events, such as corporate meetings or high-profile conferences, constant smiling may be seen as too casual or unprofessional, displaying a composed and professional demeanor is often preferred.
- Smiling should be dimmed when guests appear to value privacy or personal space, and discretion and may not welcome excessive friendliness.
- When a guest is upset, distressed, or going through a difficult situation, a constant smile may be misinterpreted as indifference or even mocking. Empathy and concern are a better replacement in this situation.

**Why aren't all service employees SMILING, as a default behavior?**

Because as you may know already, ***it takes considerably more effort (physically and mentally) to smile than to frown or be neutral.*** However small the gesture may be considered it does require consistent self or external reinforcements.

In some businesses, although their base line is direct contact with clients, smiling is not clarified as integral part of the job, the employees did not receive training, instructions or clear expectations regarding smiling. They ***may not be aware of the importance*** and since non-smiling is and accepted behavior, no feedback is formulated about this aspect so there is no effort in that direction either.

The overall workplace environment, including stress levels, workload, or management style, can significantly influence the demeanor of service professionals. A stressful or unsupportive work environment may contribute to ***a lack of positive engagement***, including smiling during interactions.

If your service professionals come from diverse cultural backgrounds, they may interpret the appropriateness of smiling differently. Some cultures might associate formality with a more neutral expression, and understanding these ***cultural nuances*** is essential for effective communication and setting realistic objectives.

Employees have ***different personalities and communication styles***. While some individuals naturally express warmth through a smile, others may feel more comfortable with a more reserved approach. It's essential to recognize and respect these individual differences and to assign duties based on talent.

## *3. The Name*

Is using the customer's name considered a personalized gesture only in luxury environments, or can it be integrated into all sizes, types, or fields of business? I firmly believe that it can be universally adapted. The simple act of addressing someone by their name is such an influential element, it creates the much-desired sense of individual recognition by establishing a more profound and personal connection.

**"Remember that a person's name is to that person the sweetest and most important sound, in any language!"**

*Principle 3 in Dale Carnegie's book "How to Win Friends and Influence People" (2017, by Simon&Schuster)*

### How do we LEARN THE NAME?

The easiest, most obvious, and most practical method is, of course, **TO ASK FOR IT** and to remember it further! You can ease this action, without sounding intrusive, by introducing yourself first.

> *This reminds me of a breakfast server in one of the hotels I worked for, who shared an inspiring short story about his struggles with using the customer's name.*
>
> *While offering coffee or tea as the first step in breakfast service, he also added:* ***"My name is Madi, I am happy to assist you today! How may I address you, sir?"*** *The gentleman, who was bothered by the question, assuming he was a more private person or did not understand the purpose, asked irritated* ***"Why do you need to know my name to bring me my coffee?"****. Being new in his job, Madi could have easily been discouraged from asking this again, could have apologized and left but he chose to answer* ***"So I can make our interaction more pleasant and meaningful, it's one of the many ways we value our guest here!"****.*

**Let's review below some ways to learn the name of a client:**

- You can find the customer's name on the card they use to pay with, remember to handle this information with discretion and professionalism.
- When customers make frequent visits or become regulars, using their name should not be just an option anymore, but an obvious expectation.
- In businesses that require reservations, accessing the reservation system allows service professionals to learn and use the customer's name during their visit.
- If customers are wearing name tags, either from an event or a workplace, this provides a visible and easy-to-spot source of their names.
- Engaging in conversation and actively listening for the customer's name when introduced or mentioned by others creates another opportunity to learn and use it naturally.

### CHALLENGES in the way of USING THE NAME

Service employees may not have received adequate training on the importance of using customer names or the proper techniques for doing so. They may not fully understand the impact of this tool or may lack motivation to do so.

Without reinforcement and recognition of good performance, this gesture may be seen as overwhelming or stressful. In fast-paced environments with high workloads, service workers may feel overwhelmed and prioritize speed over personalization.

Other obstacles faced when using the name may be the fear of mispronunciation or causing discomfort, the uniqueness and difficulty of some names, unaddressed privacy concerns as well as cultural implication of this practice (in some cultures could even be inappropriate to use the name, other customers may expect various forms of addressing or titles: Mr., Ms., Dr., Sr., etc.).

Also. leadership plays an important role on encouraging name usage, by role modeling its application both in employees and customer interactions.

## HOW TO INTEGRATE Using the Name in a fast pace service environment?

- In casual dining or coffee shops, staff can write the customer's name on order tickets or cups to personalize the service and facilitate smooth order fulfillment.
- During busy periods, a fast and friendly verbal acknowledgment using the customer's name, such as "Thanks, Mr. Client!" can add a personal touch without causing delays.
- Brief and friendly introductions that include the customer's name can be integrated into fast-paced interactions. For example, "Hi, I'm Mary. What can I get for you today, Ms. Client?"
- Service professionals can quickly acknowledge orders using the customer's name or engage in brief conversations while waiting for the payment to be finalized. For instance, "Thank you, Mr. Client, your coffee will be ready shortly."
- Recognizing and expressing appreciation for frequent customers by name, even in brief interactions, creates that sense of loyalty and familiarity. For example, "Welcome back, Mr. Client! The usual today?"

## Bonus details - How to MEMORIZE NAMES

Here are five simple techniques to help you remember names effectively:

- **Repeat the customer's name** during the initial introduction. For example, "Nice to meet you, Ms. Client." Following this, confirm the name by using it in the conversation. Repetition enhances memory retention.
- **Create mental associations** between the customer's name and a distinctive feature, whether it's a physical characteristic, clothing, or accessory. For instance, if a customer named Sarah is wearing a red scarf, mentally link "Sarah" to the color red.
- **Turn the customer's name into a mental image**. For example, if the customer is named Mike, imagine a microphone. Visual associations can make it easier to recall names later.
- **Create a wordplay** or rhyme with the customer's name. For instance, if the customer is named Lily, associate it with "silly Lily." Rhyming or playing with the sounds of the name makes it more memorable.

*In my previous workplace, I consistently made an effort to remember and use names.*
*Dealing with hotel customers and my direct customers, the employees (averaging around 400 individuals from 55 different nationalities) posed a unique challenge. Since they were not just one-time visitors, committing to memory and consistently using their names in every greeting and interaction became a daily project.*
*However, within the strong organizational culture I was a part of, it was considered a minimal yet expected level of service. One impressive name association, that I remember, was that of a Sri Lankan colleague who had a total of 12 given names, making pronunciation and recall quite demanding (to give you a short version example of his name, I am using a common Sri-Lankan name: Tharindu Dhananjaya Bandaranayake). Fortunately, the gentleman graciously introduced himself with a short, memorable nickname, adding a touch of brightness to the difficult task I was attempting!*
*Now multiply this name-related experience by 300 and you can have a fair understanding of a highly multicultural environment that can shape you in unexpected, extraordinary ways and alter your name-using ability for good!*

**In the end, here is a short but practical list of phrases you can use to better learn and memorize the customer's name:**

*"Hello, my name is / I am [insert name], how may I call you?"*
*"May I know your name, please?"*
*"Could you please share your name with me?"*
*"What name may I use to address you?"*
*"How would you like me to address you?"*
*"Could you remind me of your name, please?"*
*"May I call you by your first name?"*
*"Is there a preferred name you go by?"*
*"I want to make sure I get your name right; could you spell it for me?"*
*"Would you mind sharing your name for a more personalized interaction?"*
*"How do you prefer to be addressed?"*

## 4. A minute

The expressions ***"Wait a minute!", "I'll be with you in a minute!"*** and ***"Just a minute!"*** have evolved from denoting a specific time frame to representing a more loosely defined notion of promptness, synonymous with 'soon'.

**But it still counts as a promise of time, so if you don't plan to keep it, it's better to replace it with an a-temporal synonym.**

However, the interpretation of 'soon' is highly subjective, dependent on each guest's personality, context, and the urgency of the situation. While assuring a minute and fulfilling the commitment in five minutes might be unimportant in certain scenarios, in contexts where missing a flight is a concern, those additional four minutes can feel interminable.

Through my experiences in the hospitality industry, I have learned, sometimes through harsh lessons, the significance of either providing precise time estimates like ***"Your order will be ready in 15 minutes"*** and consistently surpassing expectations with quicker service or utilizing indefinite terms such as ***"moment!"*** - for instance, ***"Wait a moment, please!"*** or ***"Allow me a moment to check"*** – when 3-4 minutes won't make the difference but offer flexibility while ensuring a swift response.

## 5. from "No Problem!" to "My pleasure!"

I have this professional obsession - *besides the ever-present inclination to offer a welcoming smile to other guests when I, a guest too, have to stand in a hotel lobby waiting for someone* - I find myself oddly sensitive to certain words.

One of them is the phrase **"No Problem!"**.

Whether I'm requesting leftovers to be packed, making a reservation, or asking for help with a simple task, a response of "No Problem" makes me feel awkward. It's as though my question created an issue, but, as a generous favor, the service staff is graciously sweeping it away, transforming it into a 'No Problem' scenario.

What makes it even more irritating is knowing that there are numerous alternatives, each capable of sending the same message without the awkward aftertaste.

**From the casual *"Sure!"* to the swift *"Right away!"*, the formal *"Of course"* to the gracious *"My pleasure!"*, the choice of words is quite big.**

Interestingly enough, this phrase has an added value for me, it reminds me of my days working in Venice, Italy. There, I aspired to introduce, what I considered, a more pleasing option to the "No Problem" response among the staff of a luxury hotel, only to receive a stubborn resistance.

"No Problem" has a special meaning in the Italian language and culture, and I've come to understand and respect it as it is. This is attested also by the hospitality Italian book *"Nessun problema. I segreti dei portieri dei grandi alberghi"* ("No Problem. The secrets of the big hotels' concierge) by Nicolò De Rienzo.

## 6. Be proactive!

A different phrase that strongly connects with me is one full of meaning, that I learned in one of the luxury brands I was working for:

**"Allow me!"**

This expression is a clear symbol of a luxury setting, but it can beautifully be implemented in all customer-facing businesses, despite its opulent appearance, it translates into proactivity and anticipation, a natural wish to be helpful and minimize the customer's effort.

Allow me to (the second part could also be silent, replaced by the appropriate gesture)

- assist you with your luggage;
- check if we have that item in stock for you;
- guide you through our menu options;
- address any concerns you may have;
- arrange transportation for you;
- provide you with information about local attractions;
- take care of your reservation details;
- ensure your stay is comfortable and enjoyable.

In its non-verbal and concise form: "Allow me to..." would translate to proactive gestures such as:

- extending your hands to receive the coat;
- holding the door open;
- extending your hand to collect the used plates;
- refill the almost empty glass;
- offer to take the luggage or guide them to the room;

- fetch a blanket and offer it;
- present the menu or point to the recommended dish;
- move towards the concierge area or offer to lead the way;
- extend your hands to collect the trash from the customer's hands.

***"Let me!"*** and ***"May I?"*** are softer versions of the original expression "Allow me."

While "Let me!" shows a sense of eagerness and willingness to assist, "May I?" introduces a politeness that can be context-dependent. "May I?" can indeed be interpreted as seeking permission rather than offering assistance directly.

It's crucial to use these expressions in a manner that aligns with the context and the nature of the interaction, ensuring they manifest the intended tone and level of formality.

But that feeling of: "Oh, you read my *mind (actually you observed the client's arms crossed around the body trying to warm up and their thermic discomfort grimace and you proactively decided to bring a blanket to the table)!* I was indeed cold, thank you for the blanket!", is so special, cost-free, and memorable, that it would be a shame not to create it as part of your routine!

## *7. The "No, But..."*

### I often find myself compelled to add an "and?", "so?" or "but?" each time a service employee concludes our interaction with a plain "No"- just 'No.'

It's as if my brain, conditioned over time, refuses to accept that the conversation ends there.

For instance, in a restaurant, after I place my dessert order and hear, ***"I am sorry, we're out of vegan apple pie today!"*** I feel far more disappointed that the sentence stops there, regardless of the sincerity of the apology than the fact that I won't be having the apple pie. So, I can't resist asking ***"and?"*** - hoping to create an opportunity for offering options or making suggestions.

I wish the server would respond with a confident smile, saying, ***"But we have a delicious lemongrass sorbet!"***. And that's it - I'm sold! ***"I'll have the sorbet!"*** but this chance is taken so rarely that I feel like doing the job myself ***"So what else could you recommend, that it's also vegan and available today?"***

Saying "No" or "We don't have" or "It's not possible" is a reality in many situations, and simply avoiding these phrases isn't a solution. When we respond with helpful suggestions and genuine intentions to assist, we can significantly reduce disappointment or even guide the customer to a better solution than they thought initially.

**Here are some basic examples:**

- **Beauty Salon:** *"I am sorry, there are no available appointments today. But I can check for openings tomorrow or recommend another stylist if you need it today."*
- **Retail:** "I am sorry, we don't carry that product in-store. We can order for you online with free shipping or check another physical store in the city!"
- **Hotel:** "I am sorry, no rooms on the ground floor available. I can offer you a room with a nice view on the upper floors."
- **Restaurant:** "I am sorry, we're out of the special dish today. Our chef recommends trying our popular alternative (add in details), equally delicious."

➢ **Car Rental:** "I am sorry, we don't have the specific car model you reserved. We can provide a free upgrade to a similar or larger vehicle."
➢ **Fitness Center:** "I am sorry, the 5:00 PM yoga class is canceled today. You can join the 6:30 PM class or receive a credit for a future session."
➢ **Grocery Store:** "I am sorry, we're currently out of stock on organic tomatoes. You can choose conventional tomatoes or check back tomorrow."
➢ **Pharmacy:** "I am sorry, we don't have your prescribed medication in stock. We can order it for you, and it will be available for pickup in two days, or, if it's urgent, let me call the nearest branch to check if they have it."
➢ **Movie Theater:** "I am sorry, the 7:00 PM screening is sold out. You can purchase tickets for the 9:00 PM show or choose a different movie."

This reminds me of a very kind lady, a sales assistant in a hypermarket in Italy. *(Some background about me might help you understand better: I do not like shopping, either in person or online; it drains all my energy with the numerous choices, busy shops, and my almost extreme minimalist mindset. I just don't enjoy shopping!)*

One year, around Christmas time, I was looking for a particular gift basket. Since it was not prominently displayed, and I had already been in the shop for 5 whole minutes, I had to ask the sales assistant, ***"Can you help me find this particular gift basket?"***

She instantly looked as if this was her life mission and replied, ***"I don't work on this aisle, but let's look for it together!"*** and very determinedly started to look around. ***"I don't see it either; let's ask someone from the back store. Follow me!"*** I had to put some effort to keep up with her.

Together, we went to the other side of the hypermarket where she found what appeared to be a store supervisor. She continued the discussion for me; I could hear it:

*"Where can the client find this particular gift basket?"*
*"Isn't it on the first aisle?" redundantly asked the supervisor*
*"I am coming from there, and we could not find it."*
*"Then they are finished!"*
*"Not even in the back aren't any?"*
*"Maybe in the back, there are still some remaining, but I am going somewhere else right now."*
*"Can I go check?"*
*"Sure, if you want!"*

Then she goes to the storage area and comes back with the gift basket and a big smile on her face. ***"Here you go!"*** she said, very satisfied herself, like when an important mission is successfully concluded.

I could not thank her enough, not so much for the gift basket but for the displayed proactivity that was beyond expectations, as natural part of her personality, her sincere will to help. Well, if a quarter of this attitude would be displayed, with consistency, by all service professionals, across all industries, the world would be a better place, literally!

## *8. Anticipating Needs*

It took me quite some time to understand the practicality behind these beautiful words, and it does require a lot of work, a natural (or trained, in my case) attention to details, and the often-invoked consistency.

It’s not a wonder that this mindset belongs to luxury environments where there is a considerably high focus on training, rehearsing and practicing every day and there are enough resources to allocated to creating particularly the feelings of ***"You've read my mind!", "You have eased my efforts!", "You made everything better!"***, at a larger scale!

> ***Can this mindset be simplified for small and medium, independent customer-facing businesses? Absolutely, and it could serve as an efficient personalization tool.***

Anticipating the needs and wishes of the customer can be achieved in two main ways, either combined or separately, but it has a **strong prerequisite: your employees need learning and practice**, the chances for anticipation to happen naturally are rare or call for a long professional experience with the concept.

The method of **PREPARED ANTICIPATION** works exceptionally well for businesses that require reservations (restaurants, spas, private clinics, hotels, salons, event spaces, etc.) and also, but not mandatory, maintain a customer profile database.

Attempting any preparation without the two mentioned elements would only waste resources, lead to frustration, and be short-term. If your business does not yet have a customer profile, now is an opportune time to start one.

Let’s consider an example of "prepared anticipation" for a beauty salon and a small business hotel.

### Beauty Salon

- Pre-appointment questionnaire: ask about any specific hair or skin concerns the client may have, allowing the preparation of relevant products or treatments.
- Personalized welcome: use the name of the customer, and welcome them back! If it’s the first visit, offer a tour of the salon, an overview of the products used, and, if referred by friends or family, to express gratitude.
- Customized product setup: prepare a selection of recommended retail products based on the client's previous purchases or preferences, showcasing them during the appointment.
- Refreshment preferences: note dietary restrictions or preferences to offer a selection of refreshments that align with the client's tastes, such as healthy snacks or herbal teas.
- Provide a small gift or sample of a new beauty product as a welcome gesture, making the client feel valued and appreciated.
- Ask if the appointment coincides with a celebration and arrange a small surprise or a personalized congratulations message.

### A small business hotel in the city center

- Tailor the pre-arrival questionnaire to learn about specific business traveler preferences. Ask about workspace requirements, Wi-Fi needs, and any additional business-related services they may ask for.
- In the welcome email, provide a comprehensive overview of business amenities available, such as a dedicated business center, meeting rooms, high-speed internet, and any complimentary services like printing.
- Offer a personalized workspace setup in the guest's room, including a comfortable desk, ergonomic chair, and ample electrical outlets for charging devices. This anticipates the needs of business travelers who may need to work from their rooms.
- Promote business services available in the hotel, such as courier services, secretarial assistance, or shuttle services to nearby business districts. Provide information on any partnerships with local co-working spaces.
- Recognize the potential variations in business travelers' schedules. Offer flexible check-in and check-out options to accommodate early morning arrivals or late departures, ensuring a seamless experience.
- If the guest is part of a corporate partnership program, acknowledge and recognize their affiliation upon arrival.

Planning and preparation provide ample time to concentrate on anticipating needs, thereby simplifying responses to customers' questions with a confident ***"We've already thought of that!"*** This approach not only streamlines interactions but also establishes a memorable connection with the customer.

**OBSERVE and ACT** - if preparation is not always feasible, especially in walk-in, fast-paced setting like a bakery or a bank, pet shop or cafés, service professionals can instead develop their skills in observing cues and promptly responding to them.

### Let's take some examples of observing cues and acting:

- Slumped shoulders may indicate fatigue, suggesting a comfortable seating area or refreshment could be helpful.
- A frown on the face might suggest dissatisfaction, offering assistance or an alternative product could address it.
- Expressions like "I'm not sure" or "I don't know" can ask for more information or recommendations.
- Pauses or moments of indecision might indicate uncertainty, providing an opportunity to guide the customer with suggestions.
- Customers checking watches or expressing time constraints could benefit from quick, efficient service or time-saving suggestions.
- Formal attire might indicate a special occasion, prompting recommendations for premium products or services.
- Customers closely examining a product might be interested, providing an opportunity to offer more details or related items.

- Recognizing repeat customers allows service professionals to tailor suggestions based on their preferences.
- The use of specific terms or jargon can signal expertise in the same industry, allowing professionals to provide more in-depth information.
- Noticing if customers are alone or with a group can influence the type and amount of assistance provided.
- Smiles or nods can indicate satisfaction, providing an opportunity to suggest additional items for an enhanced experience.
- Shopping carts content can reveal items of interest, allowing for personalized product recommendations or making conversation.
- Crossed arms may suggest defensiveness or discomfort. The professional can address this by adopting a more open and friendly posture to put the customer at ease and use questions to understand better.
- Restlessness, such as tapping a foot or fidgeting, may indicate impatience or nervousness. The service expert can prioritize efficiency or offer additional information to ease any concerns.
- A change in tone, such as a sudden increase in volume or sharpness, might indicate frustration or dissatisfaction. You can respond with a calm and empathetic tone to defuse tension.
- Expressive gestures can convey enthusiasm or frustration. Observing these we can adapt the communication style to match the customer's level of engagement.
- Excessive phone usage may suggest a need for privacy or a desire to complete a transaction quickly. The employee can accommodate this by ensuring a swift and discreet service.
- Customers showing reluctance to engage in conversation may benefit from a more hands-off approach initially. The employee can be available for assistance without imposing on the customer's space.

***Wow, it looks like, in addition to the job requirements, each service professional must be a trained psychologist, doctor in social behaviors, and a communication expert! This job is quite challenging!***

Jokes aside, being a customer service professional is very difficult. Unfortunately, we often encounter employees fulfilling these roles with limited preparation and such a superficial approach, resulting in disappointing interactions and a continuous loop of below expectations, complaints, frustrations, disappointment, and repetition for both the customer and the employee.

In an ideal scenario, businesses invest in training programs for their employees, regularly. This training should cover not only product knowledge and procedural aspects but also interpersonal skills, effective communication, and strategies for handling various customer scenarios. Empowering service employees with the right tools and knowledge allows them to navigate complex situations with confidence and efficiency.

## *9. Asking Questions*

Have you ever dined at a restaurant, perhaps one with a more refined atmosphere in the city center, where service standards are meticulously maintained, and the staff is dressed in clean and bright uniforms, following well-defined procedures?

**PICTURE THIS**: you're enjoying your truffle risotto, and a waiter, in the midst of the service sequence, approaches your table shortly after you've started eating. They inquire, "***How is everything? Is everything all right?"*** or the all-inclusive **"All, ok?"**. You respond with an embarrassed nod, your mouth full of food, or you request some extra sauce, another fork, or more bread.

While one may see this as a gesture of genuine concern for quality, to my ears, it sounds somewhat out of tune. Is the waiter truly assessing the quality of everything and all? To me, it comes across as a standard box-ticking, a generic question meant to avoid specific feedback and potential minor complaints that could complicate the chefs' work and disrupt the seamless flow of the service.

***There are better ways to ask the same question***, showing knowledge of the dishes, interest for the customer, and a real offer to adjust if anything needs changing.

Here is a specific but basic question, different from "All, OK?" by the fact that the type of the dish is observed and used for customization:

- "How is the truffle risotto?"
- "Is our risotto meeting your expectations?"
- "Are you enjoying your truffle risotto?".
- Personalized and open-ended questions"
- "I hope you're enjoying the truffle risotto. Any specific flavors or elements that stand out to you?"
- "Your choice of the truffle risotto is fantastic! Anything you'd like more of or adjusted?"
- "The truffle risotto is a culinary delight. Is there anything I can do to enhance your dining experience?"

And of course, for the frequent cases when there are more than 3 customers with different meals, going back to "All, OK?" could be the fastest, easiest way to check this step in the service, but a professional will always choose the best way, however, more effort would imply, and take pride in this in the same time! On top of a generic verification ***"How is your dinner going?"*** you can add in some directed questions like:

- "Would you like to add anything else to your Margherita pizza?";
- "Is there anything you'd like adjusted to your spaghetti carbonara?";
- "I see you are enjoying your pasta Bolognese; can I bring you anything else at this moment?".

The ability to choose the right combination of questions comes from understanding the difference between closed and open-ended questions and the benefits of each.

**CLOSED QUESTIONS** are questions that typically require a short and specific answer, often a "yes" or "no" or a brief piece of information (a number, a date, a color, a flavor).

These questions are generally more direct and limit the range of possible responses. In customer-facing service, closed questions are often used to gather specific information quickly.

**Here are some examples of common closed questions:**

- "Did you find everything you were looking for today?"
- "Is this your first-time dining with us?"
- "Would you like a window or aisle seat?"
- "Did you enjoy your meal?"
- "Is there anything else I can get for you?"
- "Do you have a reservation?"
- "Did you want that item to go?"
- "Will you be paying with cash or card?"
- "Is this the correct address for delivery?"
- "Did you need assistance with anything else?"

**OPEN-ENDED QUESTIONS** are meant to encourage more detailed responses, rather than a simple "yes" or "no." These questions often begin with words like "how," "what," "why," or "tell me about."

In customer-facing service, open-ended questions are useful for gathering in-depth information, understanding customer preferences, and encouraging dialogue.

**Here are some examples of common open-ended questions**:

- "Can you tell me more about your experience with our product/service?"
- "What brings you in today?"
- "Tell me about any specific dietary preferences or restrictions you have."
- "How do you imagine the perfect evening for your celebration?"
- "What factors influenced your decision to choose us over other options?"
- "Can you share more about the goals you have for this project?"
- "What do you enjoy most about our services so far?"
- "How can we improve your experience with our company?"
- "What features are most important to you when selecting a product/service like ours?"

I learned, while studying journalism, that the most important skill to have in this field is **ASKING THE RIGHT QUESTION**, in the right form, guiding the dialogue partner into formulating their answers. This lesson has helped me, to say the least, in recruitment, coaching, counseling, and in understanding the customer better.

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The last part of this chapter and the final discussion in the **Coffee Shop** Kick-Off Event will focus on explaining two processes that would follow and have their purpose to support the conversion of theory (all the new actions, gestures, mimics, and words we described above) into observable, daily behaviors.

# The Reinforcement

I have been a training facilitator throughout my entire career. Regardless of the role I covered, it always includes a significant amount of time spent in training classes, working with teams to learn and practice luxury service behaviors.

These behaviors then had to be uniformly and consistently transferred into practice for hundreds of employees at all levels of experience and career.

> **From the beginning, it was clear to me that no matter the depths of my passion, the experiential methods, the role plays, and the simulations I used, learning new gestures, words, actions, entire mindsets, and behaviors required a far bigger effort.**

When we understand the difference between **PEDAGOGY** *(the principles of teaching children)* and **ANDRAGOGY** *(the principles of teaching adults)*, the objectives and actions become clearer. Coming from various industry fields, not all of us have these notions and we might end up combining unfitted techniques for the wrong audience.

**For example:**

- **children** learn, regardless of the relevance of the topic, because they are told to do so, they see the teacher as having the central role and are motivated by external aspects such as grades, and authority figures;
- **adults**, on the other side, function on very different principles: they select the relevance of the subject based on previous experience, internal motivation, benefits and applicability, they use expertise and analytical thinking to judge the information they receive.

Imagine telling the employees that they need to learn something because the company says so, without explaining the context, outlining **"what's in it for them"**, or gaining their motivation, they will sit in the learning session, but the outcome of the teaching efforts will be far below the expectations of putting the new knowledge into practice the next day!

To help with this important transfer of knowledge to practice,

- ➢ I had to treat my audience (the employees) as my associates / business partners and help them understand the advantages of fine-tuning their skills;
- ➢ I had to convince the leaders of the company to role model all new behaviors and to commit to continuous practice.

A very important pre-requisite for all change implementation in all sized companies is leadership Involvement - leaders must actively participate in and demonstrate the continuous practice of new service elements. When employees see leadership embracing these changes, it sets a powerful example and reinforces the importance of the initiative. If this fails to happen, the change could still be somewhat successful, however, it will be packed with disappointment, frustration, and the feeling of being forced to change.

**How to integrate continuous practice of new standards in a small or medium business, without disrupting the operations, impacting the fast pace dynamics, or making it feel like extra work?**

By far, the most efficient method, used in the hospitality industry, is the **DAILY PRACTICE** of small pieces of learning, on a rotation basis, during short meetings or line-ups. We can call it generically briefing (concise and focused) and define it as a 10-minute team meeting before each shift, where topics of interest are discussed/presented.

**Here is a quick structure applicable to various businesses:**

1. **Positive opening (1 minute):** using a good online review, a compliment on someone's service, great sales from the previous day, a team compliment for a well-handled busy day, or simply a positive hello would set the tone for focus and participation.
2. **Upcoming events or changes (2 minutes):** Review any upcoming events, change in processes, or modifications in the operating environment, ensuring everyone is aware of important updates.
3. **Sales and promotion focus (2 minutes):** discussing any ongoing promotions, sales targets, or upselling opportunities
4. **Excellent Service Microlearning (3 minutes):** focusing on ONE element (the smile, the questioning, being present, the proactivity, the feedback, the empathy, the extra mile), explaining the importance and the practical application, and displaying a short demonstration.
5. **Product or service highlight (1 minute):** enhancing the product/service knowledge by spotlighting a specific one and discussing its key features, benefits, and how to effectively recommend it to customers.
6. **Closing and Q&A (1 minute):** Summarize key points discussed during the briefing. Open the floor for any questions or concerns from team members. End on a positive note, expressing confidence in everyone's ability to deliver exceptional service.

This is a standard example of daily meeting content, you should personalize it to match your business, of course, keeping one element as a mandatory part of the meeting the Excellent Service Microlearning – thus harnessing the power of small but consistent actions that would contribute to a larger scale change!

To help you with the self-implementation, I have collected all the new elements from this guide in a tool to be used daily, as a basis for your short meetings: **Service Behaviors Microlearning – Facilitator Guide** (found at the end of chapter "Week 3&4 – Begin Reinforcement").

**Other reinforcement methods:**

**ACCOUNTABILITY PARTNERS:** as the name suggestively explains already, it means pairing employees up to remind each other to practice the new behaviors.

This creates a support system and makes the process more collaborative, even fun and interesting. It would manifest through

- positive feedback *("I saw you smiling to that customer / I observed you being proactive and offering [example] before the customer even asked! Congrats!")*

- constructive feedback *("I observed you forgot to mention the upsell with that engaging client / I noticed you did not smile much today, is everything all right?").*

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I remember introducing a new standard in the daily operations of a luxury hotel: ***"showing direction with the palm"*** *(even today, after many years of not having to do so, I find myself, in the most informal environments also, showing direction with an open palm, never pointing with the finger, just an example of the power of practice and repetition).*
Before adding this element to the daily habits, maybe 2% of the employees were doing it naturally or had sporadically used it in previous workplaces. The message was very simple: starting tomorrow, instead of pointing towards something, we will use an open palm and extend the arm to show direction, location, present someone or something, etc.

***"Everyone, let's practice, show me your most natural way of doing this gesture!"***

What a successful and fun training this was!
On the second day, I took a tour of the property, engaging in conversation and observing guests' interactions, only to realize that no one was showing directions with the palm. I did expect this, for sure, and gave it a week of working with the leaders *(who were learning at the same time)* to reinforce the usage of the new gesture.

The progress was slow to none.
Why? I asked, it was so simple, not time-consuming, and adding no disruptions! ***"Because we forget! When we are involved in assisting the guests, we go back to the comfortable ways because, by doing so, we can focus on solving the issues better!"*** was one direct and sincere answer I got.
What worked best was introducing a method of accountability, a non-judgmental and respectful observation ***"Oh no, you missed it!"*** or ***"Bravo, you did it!",*** indifferent to the hierarchical level, without the frustration of being continuously observed, afraid of forgetting the new standard or failing at serving a guest.

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**COMPETITIONS AND GAMIFICATION ELEMENTS**: creating challenges, competitions, or rewards tied to the consistent application of new behaviors. This can add an element of fun and motivation.

Let's take, for example, the measurable aspect of upsell. It requires a simple structure to create an upsell incentive competition, using a visual board of performance and progress, and having a real incentive at the end of the term. Here are a few examples:

**Fashion Boutique**
Objective: Increase Upselling of the new collection

- **Upselling Target:** Achieve a 20% increase in the sale of new collection items or an additional $5,000 in revenue within two months.
- **Competition Period:** Bi-Monthly Upsell Incentive Competition.
- **Visual Board:** Create an eye-catching display in the staff area with individual sales associates' achievements in upselling the new collection. Use a fashion-themed design to showcase each associate's percentage increase and the corresponding revenue amount.
- **Upsell Tracking:** recording each sale of new collection items daily using the point-of-sale system to generate reports on the sales of new collection items and associated revenue.
  Regularly update the visual board with the cumulative sales data.

- **Incentives:** The first top-performing sales associate wins a 200$ voucher to use in any of the company's shops or 3 to 5% of the final revenue coming from upselling in the two months

**Restaurant**

Casual Dining: Objective: Increase Upselling of a specific wine selection

- **Upselling Target:** Achieve a 15% increase in the sale of the specific wine selection or an additional $1,500 in revenue in a month.
- **Competition Period:** Monthly Upsell Incentive Competition.
- **Visual Board:** an inviting board in the staff area showcasing individual servers and their achievements in upselling the specific wine selection. Use a visual representation, such as a wine glass, to highlight each server's success, along with the corresponding revenue amount.
- **Upsell Tracking:** record each sale of the specific wine selection separately to track the upsell percentage for each server based on their sales and associated revenue.
- Update the visual board regularly with the cumulative sales data.
- **Incentives:** The top-performing server is a percentage of the total upsell revenue converted in money to his salary or offered as an incentive bonus.

## THE AUDIT

Implemented under different forms, the audit is a very efficient way to measure and reinforce the adoption of new service excellence behaviors or the uniform application of the current ones. Here are some forms of audit you can implement:

- **Mystery Client Audit:** external individuals, posing as customers, evaluate the overall experience to assess atmosphere, personalization, and service-specific gestures in an anonymous manner. Some of the benefits of this choice could be: gaining unbiased insights into the customer experience your business offers, having a real-time evaluation of service consistency, and identifying areas for improvement. Many companies provide the service of mystery shoppers, it's important, as in all collaboration, to do your research before selecting the right one.

- **Internal audit:** this type of verification is performed by an internal team or a team member, with the same purpose, in a declared or secret manner. Some of the benefits are: ensures alignment with established service standards, enables ongoing monitoring and immediate corrective action, and involves employees in maintaining a consistent atmosphere. This could be done by leaders, a quality manager, or a committee of employees, passionate about service, on a rotation basis.

- **External feedback analysis:** a systematic examination of customers' feedback to identify trends and patterns, top problems, and sentiments expressed. This could be done through formal feedback results, online reviews, and social media exposure and some of the benefits are: using customers' feedback for data-driven decision-making, managing online reputation through targeted improvements, and identifying and reinforcing positive service practices.

In the tools section of this guide, you will find a **Customer Experience Self-Audit** instrument to help you with better identifying the current state, plan the desired one and then, after a recommended period of 6 months of reinforcement, this self-audit can assist you in identifying that "current state" again.

In our **Coffee Shop** Study case, the Kick-Off event has entered the last part of its unfolding, the team is involved in deciding together how to better implement the new standards and create a reinforcing environment for the change. Olivia, the owner, once again summarizes the team members contribution:

| Reinforcement | Current state | Desired State |
|---|---|---|
| What reinforcement methods are we using? | Weekly staff meetings discussing employee and customer related issues. | **Daily Short Meetings:**<br>• Select a Champion (responsible), on a rotation basis, for preparing and facilitating the meeting. In this way, all employees will feel challenged and valued.<br>• We will start having daily meetings, 10 minutes before each shift, following a brief structure and support material:<br>• We start with Appreciation *(a sincere thanks for specific help, sharing a positive customer story or comment, outstanding work the day before, etc.).* Each day we will reinforce and practice one separate element *(using the Service Behaviors Microlearning Facilitator Guide).*<br>• Numbers: yesterday's revenue versus monthly/daily target<br>• Finalize with daily updates, "Need to Konow" elements: offers, events, news.<br><br>**Monthly Audits:**<br>Select randomly, each month, an Audit Champion who will actively observe and take notes on how the service standards are applied through the shift and share the results to be presented in the next team's meeting with appreciation and feedback.<br><br>**Monthly Teams Meetings.**<br>The Leader/Owner prepares monthly revenue results, summarizes the customer feedback of the month, organizes a Microlearning session based on customer feedback, and presents the Employee of the Quarter award. |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

# The Celebration

The circle of successful customer service is not complete without a consistent practice of celebrating the small and big successes, daily *(yes, you read correctly, I did mean every day)*. Celebrating individual and team achievements in customer-facing industries does not have a universal approach. It requires specificity and alignment with the unique functions and goals of each type of business.

### *Who has the time, money, and human resources to do this in a small or medium business?*

Let's look at the celebration concept from a different perspective: what is it all about in the end?

> **Each employee** ***(and each one of us)***
> **wants to be seen and appreciated,**
> **without exceptions!**
> Some more than others.

In this sense, the celebration can represent anything from a simple acknowledgment of a good working attitude to a compliment for improvement, to a consistent bonus.

Understanding which one or what combination of methods is suitable for your type of business can lead to a large pool of personalized celebration ideas.

The lack of it or the irregular manifestation, the thought that we need something BIG to celebrate, and the ***"I cannot celebrate the fact that you are just doing your job!"*** are mental barriers that keep teams' engagement low. Finding a celebration reason every day helps your team push harder through the hustle of the workload.

As an active organizer of celebrations (working in Human Resources), on a daily, monthly, and yearly heavy rotation, I realized that it's very important to find the right balance between

**the number of activities -- the time invested -- and the value of the "recognition".**

Anything outside this balance may seem forced, underappreciative, time-consuming, and frustrating.

I remember the continuous debate happening every year when organizing the Employees Party:

- the chefs cannot enjoy it because they have to prepare, expose, and maintain the food for 300 people, for more than half of the party duration;
- the events service team has to organize the ballroom, stock and tend the bar the entire evening;
- the stewarding and housekeeping teams clean during and mostly after the party;
- the Human Resources team organizes everything, follows the agenda, presents the awards, and selects the music;
- and, since a hotel is a 24/7 business, half of the employees would be on shift during the party.

… at first sounds like more reasons to not organize it at all!

And the critique without knowing the details is always so harsh: let's say we take all available employees (off shift) and invite them to a completely outsourced party in another hotel's ballroom, where all chefs can dress up, no one needs to set up and dismantle or clean afterward.

The cost to do so would reduce to almost nothing the budget for the yearly awards bonuses, 200 gifts-raffle, and internal competitions prizes.

***No matter the decision, someone will always be UNHAPPY or unsatisfied.***

Making the best decision to satisfy as many as possible is the right balance, yes, as many as possible is the goal and it's not a superficial one, is a very specific one.

- *bringing outsourced culinary and service staff for the evening*
- *replacing someone on shift so they can attend and receive an award, or just be at the party for 20 minutes, etc.*

And when everything possible within reason is done, we accept all that comes, critiques and appreciations, as my ex-boss used to say, ***"It is what it is"!***

Even for a small or medium business, always exposed to the customers, organizing a team's event per month could be very rewarding, but it can also create more frustrations than joy, so knowing the team member's needs and wishes is critical.

Let's say you propose a celebratory event after work or on the day off, there will be at least one person who has to compromise to be there, and that's the reality: what is their family status *(some may prefer to spend time with the family or have to find a nanny so they could attend)*, they may be tired and just want to rest, someone has a morning shift after, and so on.

**How to keep it simple and celebrate success in small teams?**

There must be a celebration responsible – either the leader, the owner, or a very charismatic team member, always on the hunt for celebratory reasons. It requires preparation, for some examples below, acknowledging is enough, for others preparing is necessary.

Having a celebration plan, customized for your business and implemented consistently is the key!

Here is a list of some celebratory elements, some of them described in more detail in the chapter Serving the Employees - Employee Engagement and Recognition:

- ➢ **Personal Milestones:** Birthdays, Work Anniversaries, Personal occasions, and achievements (reaching the fitness goal, obtaining the driving license, getting engaged, becoming a parent, etc.);
- ➢ **Team or Individual Achievements:** monthly targets exceeded, customer service excellence feedback, online reviews or names mentions; upselling records or incentive competitions; professional certifications obtained, successful projects finalized;
- ➢ **Company Milestones:** business anniversaries, important contracts, industry recognition and awards;
- ➢ **And much more,** depending on the company size and values: seasonal celebrations, teambuilding events, community engagement and volunteering, wellness challenges, and industry fitness competitions, innovative ideas, etc.

Creativity has no limit, and even when working with narrow resources, there are many inspired ways to stop and celebrate. And if your focus, for the self-implementation of this guide, is to reinforce the integration of the new knowledge in the daily service habits, you can center the celebration on success coming from the enthusiastic and good application of this: rewarding the positive behaviors that support the change.

This is one last stop for us at the Kick-Off event led by Olivia, the owner of the **Coffee Shop**, the subject of our study case. They are reviewing this process as it currently exists and what would be the better version:

| Celebration | Current state | Desired State |
|---|---|---|
| What and how do you celebrate at work? | • One of us realizes is someone's birthday tomorrow and runs, in the evening before, to collect money and buy a cake and or present.<br>• We have monthly meetings but someone always has to stay and serve the customers or, if it's after closing, it feels like we have to spend even more time at work.<br>• We don't keep track of work anniversaries.<br>• Sometimes, we celebrate good days of revenue, as the leader shares the results.<br>• We do Secret Santa at Christmas but it takes a lot to get together and actually open the presents.<br>• The staff meeting speeches are all about: "Great work, team! Keep it up!" although we have different individual performances.<br>• We sometimes do competitions of who up-sells one item, the most, in one day, and the winner gets a free coffee.<br>• We celebrate, once per month, one or two positive online reviews, if they come, of course.<br>• We have a Team Party in January, celebrating the new year with a lunch or a dinner out. | • Select a Celebrations Champion each month, on a rotation basis, prioritizing the team members who enjoy doing this.<br>• Design and share the calendars with all team members - create a balanced celebrations calendar per month for the entire year, and share it with the team.<br>• Involve the team members in deciding and planning for what we celebrate regularly.<br><br>**Daily/Weekly**<br>• Positive comments from guests and employees' names are mentioned in the feedback (daily tracked and collected).<br>• Revenue versus Target (clearly and transparently presenting the financial results).<br>• Upsell Performances (daily tracked and updated on a fun coffee-themed display in the office)<br>• Professional Development (training completed, certifications, etc.)<br><br>**Quarterly:**<br>• Employee of the Quarter (criteria, nominations, voting, and prizes clearly designed and explained for all employees.)<br>• Birthdays, work anniversaries, company anniversary<br>• Personal milestones or achievements (come from knowing the team members well).<br><br>**Yearly:**<br>• Seasonal celebrations (Easter, Halloween, Christmas, Valentine's Day, International Women's Day, International Coffee Day – there is a comprehensive online calendar to choose from)<br>• Team Yearly Party – adding well-thought prizes and awards, a themed dress code, and keeping the dinner or lunch in a different location. |

**How does your business address this touchpoint?**
**Dedicate a few moments to think about it and write down ideas!**

**This brings us to the end of the Kick-Off event!**

Olivia's team has a lot more to work on in the following weeks, as they start to slowly integrate all the knowledge presented today, in small steps but with big hopes. The event ends on a tired but positive note, appreciating the huge effort everyone put into clarifying the current state of their service behaviors and the connected processes and defining the future version of their interaction with the customers.

You may think that the number of new elements introduced plus the facilitation of the business-specific strategy is too high for a few hours of training during the one-day kick-off event, and I agree with you!

As the business owner, you will decide what is the priority or the selected new behaviors you need to focus on and create your one interpretation of the detailed presented concepts. Select what works for your team and start with that, I have listed all here so I can offer you a larger list of options, the selection and the final version remain with you.

In the next 3 weeks, the **Coffee Shop** team will focus on reinforcing the new elements and celebrating small and big achievements in the implementation of this important change!

# Week 3&4 - Begin Reinforcement

### The Kick-Off Summary

Together with her team, Olivia has defined, with every new standard explained and discussed, what would be the new shape of customer service they want to offer in their Coffee Shop from next week onwards.

The employees have the remaining of the second week after the Kick-Off Event to read and casually discuss the new standards, mentally prepare for the change, "try them on" and find their personal way to integrate them into the daily operations.

***A very important message here, and overall, is*** that none of the proposed changes (actions, gestures, words) will seem normal or easy at the beginning, and the higher scope is the following: your employees were hired for their attitude, personalities and unique talents, all these suggested behaviors have to come as an added value to their set of skills, not to alter their individuality or turn them into "Thank you!" and "Goodbye" robots.

They are meant to offer an extended pallet of studied and demonstrated alternatives for the raw reactions or unpolished habits one can have when interacting with customers.

The summary below will become the plan for the reinforcement phase in weeks 3 and 4, allowing gradual and assisted integration of all the changes. While discussing reinforcement methods, Olivia and her team have agreed to the following three actions to start with:

1. **Implementing Daily Meetings**

**Select a champion** (responsible) to prepare and facilitate the meeting, on a rotation basis.

Start having daily meetings, 10 minutes before each shift, following a brief structure and support material. To allow a smoother transition, the owner and the two shift leaders could facilitate the first weeks, to set an example, allow access to information, to set a positive tone:

Week 3 – Olivia, the owner
Week 4 – Robert, shift leader
Week 5 – Isa, shift leader
Week 1 – Alex, cashier
Week 2 – Nico, baker
Week 3 – Luca, barista, and so on adding the other team members in the process.

**Timeframe:** this plan and the structure below should be finalized by the end of Week 2, starting the rotation on Monday, week 3, 10 minutes before the shift.
**Structure:**

- **Opening positive note** – the facilitator will share a sincere thanks for specific help, a customer story or comment, outstanding work the day before, etc.

- **The service element of the day:** using the Service Behaviors Microlearning Facilitator Guide, the facilitator will explain, demonstrate, and practice one customer interaction element.

- ➢ **Numbers:** the facilitator will present yesterday's revenue versus the monthly/daily target; *If the question is: "How will the barista have the revenue of the last day to present?" the answer is simple, from the leader! Facilitating the meetings requires preparation and it's done this way to positively challenge and develop the employees, making them feel part of the process. If someone does not feel comfortable doing it, there is no point insisting, the leader should take the place.*

- ➢ **"Need to Know" elements of the day:** the facilitator will remind the team about any new product, offer, event, or change that may impact the day.

- ➢ **Closing positive note:** allowing for questions, comments, and suggestions and ending the brief meeting with encouraging messages!

There will be days when having the meeting each day before shift will not be possible and flexibility is required: have it later in the day when/if the service is slower; not skipping more than a maximum of 2 days of the daily meeting; if not possible due to high volume of customers, the responsible creates a short-digital version of it and sends it to all employees, etc. It's important to keep the original form of it, a face-to-face, 10-minute meeting, to start the day with energy!

### 2. **Continue Monthly Teams Meetings**

Organize monthly meetings to

- share revenue results, customer feedback, business updates
- practice the new behaviors *(with fun, new exercise, or based on the instructions from the SBM Facilitator guide)*
- celebrate (birthdays, anniversaries, incentives, and awards).

This could be an informal gathering with drinks and finger foods or a formal set with a proper presentation in an event meeting room.

**Responsible:** the owner with support from the team members for the preparation.

**Timeframe:** start at least one month after the Kick-Off event! Select the date that is best for most of the employees, a time of the day when the service is slow, and avoid the end of the working day as the energy may be low, preferably the first week of the month presenting the results of the past month.

### 3. **Implement Monthly Self-Audits**

Select randomly, each month, an audit champion who will actively observe and take notes on how the (still) new service standards are applied during the shift and share the results during the next team's meeting with appreciation and constructive feedback (use the short version of the Customer Experience Self-Audit).

You can select 2 days out of the month, keeping both the champion's identity and the days secret or you can announce one or both, as long as the whole process is understood as a learning opportunity and not a chance to hunt for mistakes and point fingers.

This tool needs to be presented as a mutual accountability and learning chance, not as a formal audit. Correlate the findings with the next microlearning session during the monthly meeting, or organize a special training session with a focus on the improvement areas.

**Responsible:** the owner organizes the random selection of the next champion, from a list of volunteering employees, who receive the necessary instructions on how to perform an unbiased audit based on a specific set of observable behaviors. Being a learning tool, the Audit Champion doesn't need to be an expert or a role model in applying the standards, having to observe others is a strong learning tool itself.

**Start Date:** at least two months after the Kick-Off event!

Depending on the size of your team and business the reinforcement plan needs adapting, adding more elements, and defining the processes in a very clear and transparent way.

## Service Behaviors Microlearning Facilitator Guide

Starting with the first day of the third week, the team will use the guide below to practice the Service element of the day. This facilitator guide is created for two weeks, 5 days each week and when it is finished, it starts from the beginning, following the principle of repetition until the practice is considered finalized and all the desired new actions become normal, daily displays of natural customer interaction.

Depending on your business, you have the freedom to personalize this structure to better serve your unique business!

### WEEK 3 - DAY 1

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**Touchpoint: The Reservation**

Facilitator:
Ask participants to roleplay answering the phone using a phrase that respects the standards of greetings, location, name, and offering assistance, for example:
*"Hello, you've reached the [Business Name], this is Mary, how may I assist you?".*
Allow team members to personalize the phrases to what makes them comfortable, including the essential elements.

**Simplified Luxury: Below-Meeting-Exceeding Expectations**

Facilitator:
Ask: *"What is the difference between Below-Meeting-Exceeding expectations when serving our customer?"*
Acknowledge the answers. Ask for volunteers: *"Please offer other examples!"*. Add more examples (adapt one to reflect your business products or services):
Below Expectations: *"Coffee for you. Anything else?"*
Meeting Expectations: *"Here's your coffee. Enjoy! Cream and sugar are on the side. Let me know if you need anything else."*
Exceeding Expectations: *"I have your hot americano, Mr. Client. Do you have any preferences for cream or sweeteners? May I suggest a delicious new pastry we just took out of the oven to go with the coffee? If you need anything else, please, let me know!"*

## WEEK 3 - DAY 2

**Touchpoint: The Welcome**

Facilitator
Ask: *"What are the elements of a great welcome?"* Allow time for answers and acknowledge them. Summarize or add the necessary elements: proactively monitoring the entrance upon a new customer's arrival, greeting, from the distance, with a smile, eye contact, and a nod to express gratitude for the client's patience in waiting. When the customer is close enough: use verbal greeting, keeping a smile and eye contact: "*Good morning, what can I offer you today?"*

**Simplified luxury: The Smile**

Facilitator
Ask: *"Why is the smile very important in our business?"* acknowledge and encourage the answers (expect something like: it creates a welcoming atmosphere, it opens communication, it conveys appreciation for the customer and positivity, etc.).

Ask *"How can we remind each other to smile more often?"* (possible answers: smile at each other, make silly faces, show a forced exaggerated smile, use funny props showing a big smile, have mirrors around, have posters reminding us to smile before we exit the front counter, etc.).

## WEEK 3 - DAY 3

**Touchpoint: The Ambience and The Amenities**

Facilitator
Ask: *"Why are the ambiance and the amenities in our business important for the customer?"* Acknowledge and add to the answers: "*It contributes to the first impression, to the mood of the customer, describes the level of attention to details, anticipates needs of the customers, etc."*

Say: *"Let's have a look around and see if there is anything related to the ambiance that we can improve in under 1 minute"* - (expected findings like: adjusting a chair, cleaning a window corner, replacing/watering a flower, straightening the books on the display, dimming the lights, changing the music, etc.).

Say: *"Now, looking at each other, is there anything we can say or suggest in terms of appearance?"* (expect or add answers such as: "adjusting the apron/shirt, complimenting someone's new haircut, appreciating someone's smile, etc.")

**Simplified luxury: Anticipating the needs**

Facilitator
Ask *"What are the two main ways to anticipate the customer's needs?"* expect similar answers to: "advanced preparation" and "reading cues".

Say: *"Offer a few examples of how can we prepare in advance?"* expect or add answers like: be on time for the daily meeting, organize the space so everything is handy for the busy time of the day, placing a "reserved" sign + a personalized note on the preferred table of a regular customer who works from the ship for 2 hours in the morning, know the type of coffee you sell the most in the evenings and have all ingredients ready in advance, etc.– appreciate all answers!

Ask: *"Offer a few examples of how can we observe cues and act on them*"; anticipate answers such as: "a customer being in a hurry, speaks fast and looks at his watch – we act fast, we confirm that it will be ready as fast as we can, we appreciate the patience"; "a customer with a small fussy baby: we engage with the baby to distract them, we act fast as their patience is limited, we offer something baby friendly to play/eat"; "we see a repeated customer - we welcome them by the name and offer "the usual" confirming what that is "medium americano?". "If we don't know the name, we ask and remember for the next time", "if time allows we engage in a casual short conversation about the day/work/time/travel", appreciate all answers.

## WEEK 3 - DAY 4

**Touchpoint: The "How May I Help You"**

Facilitator
Ask: "*Why is it important to ask "How May I Help you?"* expect and add answers such as: to display the desire to assist, to transition from welcoming to doing business.

Ask: **"What are some ways in which we can adjust this phrase to our business?"**, possible answers could be "As the customer approaches, we will say (and when possible, if we know the guest, we MUST use their name after the question!): "*What can I offer you today, Mr. Client?", "What would you like to order, Ms. Client?", "How may I help you this morning, Mr. Client?*". Appreciate all variations of the phrase that conveys interest to the customer.

**Simplified Luxury: The Name**

Facilitator
Ask: *"Why is it important to learn and use the customer's name when we can?"* welcome possible answers: to make the interaction more enjoyable, to personalize the experience, to create a meaningful connection, to recognize the client for the regular visits, to show care and interest.

Ask: *"What are three ways of learning the name?"* possible answers can be: by introducing ourselves and asking for the *name "May I have your name?"/ "My name is Mary, how may I call you?"*, by reading it on the credit card while processing the payment, by reading it on a possible access card or nametag the customer could be using".

## WEEK 3 - DAY 5

**Touchpoint: The Conversation and The Upsell**

Facilitator (if time allows, ask all the questions below, if not, choose the most important ones for your team that week, using the remaining ones next time!):
Ask: *"Why is making conversation important for the relationship with the customer?"* expect potential answers like: it personalizes the interaction, it shows interest, it creates an open communication, it adds value to the transaction.

Ask: *"When can we engage in conversation with a customer?"* expect potential answers such as: when the time allows it (slow pace, small queue), when there is an obvious reason (customer is relaxed, curious or engaging), when the customer is coming back, when it's a tourist speaking a different language, etc.

Ask: *"What are some conversation phrases we can use?"* Expect answers like: "*I see you have…," "I noticed you…," "Where are you from?"* and *"How is your day going?"*.

Ask: *"Who wants to volunteer for a short roleplay of practicing conversation?"*, take one volunteer and congratulate the initiative and the outcome!

Ask: *"What are the special offers this week?"* expect the answers to be knowledgeable and detailed (e.g.: Buy One Get One Free (BOGO) Coffee Hours, special offer featuring a Maple Spice Cold Brew, New in the Menu "Vegan Mini Croissant", only today, try it for free when you buy a coffee!).

Ask: *"When do we remind the customers about the special offers?"* expect answers such as: with every interaction (if times allows it, when the customer is engaging or just in a positive mood).

Ask: *"What are some phrases you can use to introduce a special offer?"* the answers may include:
*"I see you prefer pastries, have you tried our new vegan mini croissants?"*
*"Surprise a colleague with a coffee, we have a special offer this hour, Buy One Get One Free for these types of coffee, are you interested?"*
*"Have you tried our new coffee specialty …?"*
*"Have you seen the special offer of the day?"*

**Simplified Luxury: Asking Questions**

Facilitator
Ask: "*Why is it important to be mindful about the questions we ask?"* expect answers such as: because by asking the right questions we can collect useful information, preferences, and needs, we reduce the number of misunderstandings, avoid frustration and time waste. Ask: *"What are the two types of questions we can use?"* expect answers such as: closed questions, requesting specific, one-word answers like yes, no, three, afternoon, cold, etc. e.g.: *What size for the coffee? Sugar or sweetener for the tea? Do you want to drink here or to go? How many croissants?"*; open-ended questions, inviting the customer to share, explain, and describe, using more words, e.g.: "*How would you describe your experience in our shop so far? How is your day going? How has your visit to Romania been so far? How would you describe the new coffee blend we prepared?"*, etc.

Ask: *"What is the best way to use these types of questions?"*, appreciate all answers and summarize with: *"The best way is to combine them for a better understanding of the customer's needs and wishes"*

***Optional Exercise:*** if time allows, on a small piece of paper, draw something simple and folded so it can't be seen.
Suggest: *let's play a short game to help us better understand the usage of the two types of questions: try to guess what I drew on this piece of paper, by using the best combination of questions, you have a limited number of 6 questions* (more or less depending on the time). Anyone can address a question, and listening to the answers can lead you closer to the correct guessing. (Help the team members navigate between closed questions: *Is it alive? What color is it? Is it big?* and open-ended questions: *"Please, describe it, using 5 words! What is it used for? How is it making you feel? What experience is it contributing to?* etc."). Keep track of the number of questions, congratulate all your team members, and reinforce the importance of using the right questions.

## WEEK 4 - DAY 1

**Touchpoint: The Timeliness**

Facilitator
Ask: *"What is the correct speed of working in our business/shop?"* appreciate all the answers (e.g.: fast, really fast, depending on how busy we are, etc.) and summarize with the correct one, if not mentioned yet: *"the correct speed is matching the sense of urgency of the customers we have in the shop!"*

Ask: *"What are some cues we can observe to tell us more about the customer's state in terms of timeliness?"* expect answers such as: being in a hurry: knows what to order, looks at the watch/phone multiple times, speaks fast, looks around agitated, and moves constantly; being relaxed: a smile, the wish to engage, less movement, undecided about the order, observes the dynamics of the service", etc.

Ask: "*How do we adapt to these different behaviors?"* expect answers such as: by reading the entire room, not only the customer in front, by mirroring the behaviors as much as possible without disrupting the atmosphere in the shop (e.g.: becoming too relaxed and engaging too long with a customer, when the one behind is clearly in a hurry; or rushing a customer through the order, without smile and eye contact, because the shop is busy).

**Simplified Luxury: A Minute**

Facilitator
Ask: *"How can we convert the specific "Wait a minute!"/ and the slightly irritated "Just a second! Hang on a second!" into a more elegant phrase, avoiding also the promise of a timeframe of response?"* expect answers such as "*Just a moment, please! Allow me a moment, please! I'll be with you in a moment!"*, appreciate all answers!

## WEEK 4 - DAY 2

**Touchpoint: The complaint and The Recovery**

Facilitator
Ask: *"How would you describe the ideal customer?"* possible answers could be: acts politely, smiles back, says thank you, respects other customer's time, shows understanding, leaves tips, etc. Appreciate all answers and observe that the employee has just described how they should behave as well! Acknowledge that we also have to handle difficult customers and reinforce the idea that we need to support and protect each other from disrespectful behaviors and difficult situations.

Ask: *"What are the professional steps to use when a customer complaint?"* the answers should be guided to the steps discussed during the training: Active listening (to understand and to allow the customer to vent), showing empathy (using phrases that show understanding: *"I would also feel frustrated to receive my coffee cold! / Have to wait for so long, etc."*), apologizing (using eye contact, offering a sincere "*I am sorry" "I apologize"* (not "Sorry!" or "Ups!"), offering solutions (showing a sincere interest in solving the issue for the customer, using empowerment to decide the compensation). <u>Role Play Suggestion:</u> if time allows choose one or two of the role-plays below, leaving the rest for the following weeks of reinforcement.

Ask: *"What are the three essential elements in analyzing a complaint?"* The expected answers should be: the emotional tone of the customer, the responsibility (whose fault is it?), and the gravity (how severe are the consequences of the situation?).

Ask: *"Provide an example of a complaint where there's no one's fault (it's raining, it's too hot outside) and the gravity is low to medium!"* appreciate the answers and propose: *"let's have a short role-play, I will be the customer!"*

Ask: *"Provide an example of a complaint where it's our fault and the gravity of the situation is low to medium!"* appreciate the answers and propose: let's have a short role-play, who will be the customer?

Ask: *"Provide an example of a complaint where it's our fault and the gravity of the situation is really high!"* appreciate the answers and propose: *let's have a short role-play, I will be the customer?*

Ask: *"Provide an example of a complaint where it's the customer's fault and the gravity of the situation is really high!"* appreciate the answers and propose: *let's have a short role-play, who will be the customer?*

Say: *"Thank you all for the participation and the great practice!"*

**Simplified Luxury: No, But…**

Facilitator
Ask: *"What does this phrase mean to you?"* possible answers could be: that we don't have what the customer wants, but we suggest something else; offering solutions when we cannot provide what the customer asked for, etc.

Ask: *"What is the worst way to handle a situation where we do not have, we cannot provide?"* expected answers are: stopping at No, we don't have, offering only an excuse or a sincere apology, offering an alternative that is too far from what the customer asked for (offering dairy based croissants when the customer asked for vegan croissants).

Appreciate all the answers and summarize with: *"if we follow the No, with a sincere desire to help the customer find an alternative, the disappointment is drastically reduced"*.
Propose (as many as time allows): let's have a short role play to practice our attitude and language, I will be the customer: *"Do you have any empty tables/seats, I don't see any…?" answer: "No, but…"; "Do you have coconut milk for the cappuccino?", "No, But…"; "Do you sell any fruits here as well?", "No, But…", "Do you have any special offers at this moment?" "No, but…"*
Appreciate the participation and congratulate the team members for the responses!

## WEEK 4 - DAY 3

**Touchpoint: The Going the Extra Mile**

Facilitator (always allowing time for personal answers before adding these examples)
Ask *"Why is it important to "go the extra mile" in our interactions with the customers?"* possible answers may be: it personalizes the transaction, it creates emotion and connection, it fosters loyalty.

Ask: *"Why don't we do it consistently?"* some answers may be: because customers become entitled, they expect even more the next time, it's time-consuming, and could require money and effort.

Ask: *"What extra mile actions can we implement with limited effort"*, possible examples could be: Recognizing the regular guests by their name, *"Welcome back, Ms. Client!*
Complimenting the customer: for the choice of coffee, for the daring haircut, etc.
Occasionally provide a complimentary upgrade to a larger coffee size for customers.
Take e a moment to engage in friendly conversation with customers, making them feel valued.
Encourage sustainability by offering a discount to customers who bring their reusable cups, promoting eco-friendly practice
Provide small toys or coloring sheets for families with children, making the coffee shop more welcoming for parents
Create Minimal Personalized Coffee Art
Offer small, complimentary samples of new or popular pastries for customers to try.

Ask: *"How many extra mile actions you commit to perform today?"* allow all answers and remind the team that this is just a commitment to being mindful not a tracking list or a competition!

**Simplified Luxury: Allow me!**

Facilitator
Ask: *"What does this phrase mean to you?"*, The expected answers could be: offering to help the guest, being proactive, having the initiative to assist, being happy to help. Appreciate all answers!

Ask: *"How can we adapt this sophisticated phrase to our business/shop?"* answers could be: by saying *"Let me help you bring the coffee to the table!" "I can take that empty bottle and throw it for you* (or simply do the gesture)!" *"Let me help you with the door* (or simply doing the gesture)*"*, (a customer looking to make a birthday surprise) *"Let me arrange with the chef a special selection for you*", (a customer in a hurry) *"Let me pack these fast for you so you can be on your way!"*, (an undecided customer) *"Let me help you decide! What is your favorite …?"*, etc. Congratulate to the team for all the examples!

## WEEK 4 - DAY 4

**Touchpoint: The Payment, The Hot Feedback, The Farewell**

Facilitator (always allowing time for personal answers before adding these examples)
Ask: *"Why is this step so important?"* possible answers may be: because this remains in the customer's memory upon departure; if it's below expectations it can shadow a great first impression, it can offer important information about the experience, it secures the revenue, could be opportunity for tips, etc.

Ask: "How can we meet or exceed expectations at this step?", the answers should include: a swift and correct payment, a personalized feedback question (*"How was your soy milk cappuccino?", "How was the new cherry muffin you tried?", "How was your first time in our shop?"*) and a sincere farewell: eye contact, smile, thank you and a personalized farewell "enjoy your coffee*", "Have a good day at work!", "Enjoy the rest of your trip!", "Stay warm!", "Have a great evening!"*). Appreciate all the answers!

**Simplified Luxury: from No Problem to My Pleasure!**

Facilitator
Ask *"How can we refine our language to remain between "no problem" or the pretentious "my pleasure" when assisting the customers?"* possible answers could be "using *"Of course!", "Sure!", "Right Away",* depending on the customer *"My Pleasure!".*

Ask: *"Why should we replace "No Problem!""* some answers may be: it creates the sensation that the request could actually be a problem or create an inconvenience, and the server is doing the customer a favor; it reduces the feeling of a genuine desire to assist or help.
Appreciate all the answers!

## WEEK 4 - DAY 5

This is called the **Sharing Learning Day** and it serves as a celebration of the progress.

Facilitator
Ask: *"Who wants to share what Service Behavior or Action has been successfully used this week"*

Add personal example: *"I managed to engage in more casual conversation with some customers and I could see they left happier!"* expect two to three answers encouraging examples.

Ask: *"What Service Behaviors or Actions are more difficult to embody?"* share your example: *"I find it difficult to learn and use the customer's name, because of the busy pace, but I am always looking for opportunities to do so!"* appreciate all the answers and finish on an encouraging, positive note!

# Week 5 – Begin Celebrating

### If you and your team have reached this point, there is so much to celebrate already!

- ➢ the progress;
- ➢ following together a structure;
- ➢ integrating a change and new actions daily;
- ➢ keeping each other responsible and working every day to improve;
- ➢ being a little bit more aware of your non-verbal signals;
- ➢ transforming the experiences you offer to your customers!

### What and how to celebrate this early?

Well, some practical ideas may be:

- one-month implementation updates;
- favorite new behaviors based on the reaction you get or how it feels when you perform it;
- the increased number of online reviews;
- the positivity trend in the customer's feedback;
- the team's hard work and passion invested in this change;
- maybe even revenue increases!

Start celebrating with:

- ✓ inspiring public acknowledgment of great service, reading positive comments out loud in the daily meeting;
- ✓ awarding the Service Star of the Week/Month;
- ✓ selecting the most influential change maker;
- ✓ offering vouchers, bonuses, free coffees, special lunches, anything your team would enjoy!

They are making an extra effort and they deserve recognition.

The **Coffee Shop** team has planned a few celebratory activities and proposed a monthly calendar of activities (even a yearly, one for a larger overview). This could easily be integrated and combined with a microlearning/training plan.

At the same time, they have defined the details of each type of reward, incentive, or another celebration basis to make it transparent and easy to use by everyone *(criteria and voting system for Employee of the Quarter, upsell Incentive criteria, tracking and rewards, birthdays and anniversaries gifts and wishes, seasonal celebrations themes and contents, etc.).*

The responsible could be one designated member, or, as for the daily meeting, a monthly celebrations champion to coordinate and involve the team in organizing the celebration.

Here is, below, a very basic form of activities and recognition events in October – you can easily use this template to create your overview of the month so you can plan, and organize meaningful activities and memorable celebrations.

Celebration Activities Calendar, October 2024, The Coffee Shop Team

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|---|---|---|---|---|---|---|
| 30 | 1<br>"International Coffee Day" | 2 | 3<br>**Luca's Birthday** | 4 | 5 | 6<br>"International Smile Day" |
| 7 | 8<br>**Olivia's 2Y Service Anniversary** | 9<br>Monthly Team Meeting | 10 | 11 | 12 | 13 |
| 14 | 15 | 16<br>"Employee of the Quarter" Award | 17 | 18 | 19<br>"PinkDay" BC Awareness | 20 |
| 21 | 22<br>**Jamie's Birthday** | 23 | 24 | 25<br>Coffee Art Competition | 26 | 27 |
| 28 | 29 | 30 | 31<br>**Halloween** | 1 | 2 | 3 |

# The Closing Note

### Thank you for your curiosity and the tenacious commitment to self-improving!

If you reached The Closing Note, it means you found at least one idea that inspired you!

I hope you feel enthusiastic, seeing your business with fresh eyes, now that you know how different it could look!  Maybe you are confused, there are just too many aspects to consider, overwhelmed by how much you could change, discouraged by the efforts demanded from you. This is understandable and it only means that you care!

The message is simple: **TAKE WHAT YOU NEED!**

**If you are a freelancer or a solopreneur**, you are a one-(wo)man-show being at the same time the business, the employee, the brand, and the values. **TAKE WHAT YOU NEED** to shape your own skills and create experiences rather than provide services. Answer that call, write that email, connect in that meeting, and deliver that project at its best level! Select the gestures, words, tools, and mentalities that add value to your work.

**If you are a small business owner** in the customer-facing service industry, a servicepreneur, then you are the leader and everything will reflect your actions and decisions. So, **TAKE WHAT YOU AND YOUR TEAM NEED** to exceed those expectations! Appreciate and celebrate more, listen to the emotional and physical voice of your employees to better care for them, and listen to the needs and wishes of your customers to guide your service.

**If you are a service professional**, I admire your dedication to self-development. **TAKE WHAT YOU NEED** to upgrade your many talents, become even more valuable on the market, and declare yourself an experienced curator because that's what you are!

**If you are a customer** (and all of us are customers, daily!) respect yourself by not accepting service below expectations, and appreciate the service employees for their continuous effort to create experiences. **TAKE WHAT YOU NEED**, know what you deserve, and don't settle for less. The quality of service in your community could also be influenced by your feedback and your choices.

### This is the call to action:

> **Let's normalize great service**
> **and make it possible**
> **to have attentive and professional interactions**
> **across all customer-facing businesses,**
> **big or small!**

# The Tools

## Employee Experience Self-Audit

Read carefully each question and:

- Answer with YES (add 1 point) if you are confidently and consistently applying that principle, at the moment, in your company.
- Answer with NO (add 0 points) if you don't apply that principle at the moment, even if it sounds interesting and you would like to adopt it in the future.

| Questions | YES=1 NO=0 |
|---|---|
| Have you defined your company's mission, vision, and values? | |
| Are you using them as guidelines in customer and employee-related actions? | |
| Are they clearly explained to the employees and reinforced periodically? | |
| Are they reflected in the work environment you created? | |
| Do you recognize behaviors that reflect the company's values regularly? | |
| Are they prominently displayed for everyone to see? | |
| Is your job posting clear, detailed, and attractive for the candidates you want to attract? | |
| Does your job posting contain these details: company overview, role and responsibilities, requirements, benefits, and application steps? | |
| Does the company use social media effectively for recruiting purposes? | |
| Do you have a structured system for collecting, reviewing, and storing applications? | |
| Do you include most of these details in an email to a candidate: proper greeting, candidate's name, the role they applied for, details of a proposed call/interview, timeframe options, enthusiastic tone, and openness to questions? | |
| Have you and/or your recruiters attended a training on interviewing skills or have proven previous experience? | |
| Are you using behavioral questions based on examples from past experience? | |
| Are you preparing for the interviews by reading the CV and selecting the best questions? | |
| Are you making your candidate feel emotionally and physically comfortable during the interview so they can present themselves in the best light? | |
| Can you identify and eliminate: possible biased attitudes, intimidating questions, superior behavior, and talking more than the candidate during the interview? | |
| Are you actively listening to recognize: vague, theoretical, hypothetical, or collective answers? | |
| Are you writing down facts described by the candidate instead of personal opinions? | |
| After selecting the right candidate, are you sending a detailed email containing: congratulations, the confirmed role, the next steps, the excitement of upcoming collaboration, and important attachments such as work contract/offer, company booklet, colleagues' presentation, etc.? | |
| If the time before selection confirmation and start date is longer than a week, would you check in with the new joiner at least one time, an average of two times per month? | |

| Questions | YES=1<br>NO=0 |
|---|---|
| Are you preparing for the arrival of the new joiner: office/workspace setup, system and technology setup, welcome banners, informing the team so they can offer a great welcome, and preparing a first-day agenda, and training plan? | |
| Is there a designated onboarding session focused on company culture and values? | |
| Are you organizing a meeting to clarify expectations in terms of behaviors, standards, performance, and learning? | |
| Are you having the first feedback meeting no later than 1 month after the start date? | |
| Are you offering various learning opportunities in your company: online learning, microlearning, cross-training, brainstorming, and expert sharing? | |
| Are you conducting a training needs survey (ideally every year)? | |
| Are you involving the employees in sharing expertise, teaching, and facilitating? | |
| Do you use a Monthly Training/Activities Calendar? | |
| Are employees provided with opportunities for professional development and promotion? | |
| Are you having regular feedback sessions with your employees? | |
| Have you and other leaders offering feedback participated in Giving and Receiving training or have proven previous experience? | |
| Are the levels of performance clearly specified and explained to employees so they understand how their performance is measured? | |
| Are you offering positive feedback as much as constructive feedback? | |
| Are you preparing before a monthly feedback meeting: to collect data, online reviews, colleagues' remarks, results versus target, and personal observations? | |
| Is the feedback discussion having a positive tone, focusing on helping the employee identify what needs to be changed? | |
| Is the feedback focused on actions rather than on the person? | |
| Is there and written action plan created and agreed upon with the employee after feedback discussion? | |
| Is there a system in place to address underperformance effectively? | |
| Are you conducting an engagement survey every year to better understand the level of commitment of your employees? | |
| Are employees recognized for their contributions to the organization? | |
| Are you considering most of these aspects when analyzing employee engagement: employee belonging, work conditions, leadership style, teamwork, learning, and pay? | |
| Are you creating and implementing action plans as a result of the engagement survey and highlighted weaknesses? | |
| Are you organizing engagement and recognition activities such as employee of the month, birthdays and work anniversaries, seasonal celebrations, team buildings, community volunteering, industry-based rewards, and incentives? | |
| Are you providing clear guidelines for describing and handling employee relations like immoral, unethical, and illegal actions, harassment, misconduct, and lack of performance? | |
| Are you making sure that employees are treated fairly, respectfully, and within their legal rights while handling a conflict or one of the actions mentioned above? | |

| Questions | YES=1<br>NO=0 |
|---|---|
| Are employees provided with a confidential channel to report workplace conflicts? | |
| Do you have a clear structure for a separation process? | |
| Are you taking all measures of a fair and respectful offboarding, regardless of the reason for separation? | |
| Are you collecting feedback through exit interviews? | |
| Are you organizing farewell gatherings to show gratitude and extend best wishes when applicable? | |
| Are you (when applicable) offering support during offboarding: career counseling, job referral, recommendation letter, service certificate, or career transition? | |
| **TOTAL Points** | |

The final score is represented by the sum of the numbers in the Yes or No column.

If your total score is **15 and below**, there is clearly room for improvement, the changes in customer service you aspire to introduce may not be welcomed as you hope so, because the basic elements of an engaged team are not ensured.

You could use the guidelines below to take the level of actions adapted to your company's size and current status of performance and interactions, before adding new standards of behaviors, new goals, and targets to reach.

If your total score is between **16 and 35**, you are providing your employees with the minimum requirements to feel appreciated, secure, and fairly treated. There are many unturned stones but with limited resources, that is understandable.

You have good chances to bring in new customer service standards and be embraced with enthusiasm, as long as you follow the guide thoroughly, especially in the last two parts of reinforcement and celebrations – doing that, may just compensate for some missing current aspects.

If your score is **35 or higher**, your company has a solid foundation.

You already unlocked the employee experience level and now you can place the focus on creating more authentic relations with your customers.

## Customer Experience Self Audit

Observe the column **"Applies to my business Y=1/N=0"** – because this self-audit is designed to be useful to a variety of service industry businesses and it has a limited specificity, some of the actions below may not apply to your company. The business applicability is the degree to which some of the actions listed in the self-audit could be part of your daily routine or not *(for example: if you own a pharmacy, a clothing store, or a café, you may not need any of the steps in the Reservation category or an Website so that does not apply to your current business;).*

So, add 1 point if the action applies (Y stands for YES) or add 0 points if the action does not apply (N stands for NO).

Then for the same action, only in case it applies to your business (and you placed 1 point in the first column) evaluate if it is present or not.

- Answer with YES (add 1 point) if the action is consistently present at the moment, in your company.
- Answer with NO (add 0 points) if the action is not present, at the moment, even if it sounds interesting and you would like to adopt it in the future.

| Actions | Applies to my business Y=1/N=0 | Element Present Y=1/N=0 |
|---|---|---|
| **Digital Presence:** | | |
| Is the website design visually appealing and easy to navigate? | | |
| Are online menus, services, and pricing clearly presented? | | |
| Can customers easily find contact information, including phone numbers and email addresses? | | |
| Is the website optimized for mobile devices? | | |
| Is there an online chat or support feature for immediate customer assistance? | | |
| Is the website content regularly updated to reflect current offerings and information? | | |
| **Reservation/Booking Process:** | | |
| Is the reservation or booking process completed within a few easy steps? Online or on the phone | | |
| Is there an option for customers to modify or cancel reservations online? | | |
| Are special requests, preferences, allergies, collected during the reservation process? | | |
| Is there a clear policy regarding reservation cancellations and possible charges? | | |
| Are customers provided with information about promotions, on-site parking or transportation options during booking? | | |
| Is the reservation system integrated with the overall customer database for personalized service? | | |
| Is the reservations assistant using telephone etiquette, remaining positive and helpful throughout the interaction? | | |

| Actions | Applies to my business Y=1/ N=0 | Element Present Y=1/N=0 |
|---|---|---|
| **Welcome Experience:** | | |
| Are entrance areas clean and welcoming? | | |
| Are staff members present and ready to assist upon customer arrival? | | |
| Is the employee the first to say hello, welcome, and how may I help you using an enthusiastic tone? | | |
| Is there a visible sign or display showcasing any current promotions or events? | | |
| Is there a designated area for customers to wait comfortably if needed? | | |
| Are customers addressed by name upon arrival if applicable? | | |
| Do staff members offer a warm and genuine greeting to arriving customers? | | |
| Are new customers provided with a brief orientation to the facilities upon arrival? | | |
| Are employees trained to handle special requests or inquiries at the entrance professionally? | | |
| **Check-In/Ordering Process:** | | |
| Is the check-in/ordering process streamlined, with minimal paperwork? | | |
| Are customers provided with a brief overview of available facilities and services upon check-in? | | |
| Are digital or contactless payment options available and encouraged? | | |
| Are staff members trained to upsell or recommend additional services appropriately? | | |
| Do employees exhibit a positive and helpful attitude during the interaction? | | |
| Are employees trained to handle errors or discrepancies with professionalism? | | |
| Do employees use guest names during the interaction when applicable? | | |
| Are employees trained to provide a personalized touch during the welcoming process, such as offering a welcome drink or amenity? | | |
| **Service Interaction:** | | |
| Are staff members trained to use positive language and gestures during interactions? | | |
| Is there a system in place to address and resolve customer complaints or concerns promptly? | | |
| Are staff members knowledgeable about the origin, ingredients, or specifications of products/services? | | |
| Is there a consistent and recognizable uniform or dress code for customer-facing staff? | | |
| Do employees undergo regular training in customer service and interpersonal skills? | | |
| Are staff members trained to anticipate customer needs and provide proactive assistance? | | |
| Are employees trained to handle difficult or upset customers with empathy and professionalism? | | |
| Are staff members trained to communicate with diverse customers, considering cultural sensitivities? | | |
| Are employees empowered to make decisions to enhance the customer experience within certain guidelines? | | |

| Actions | Applies to my business Y=1/ N=0 | Element Present Y=1/N=0 |
|---|---|---|
| **Product/Service Quality:** | | |
| Are products consistently fresh, high-quality, and well-presented? | | |
| Are replacement or refund policies communicated clearly to customers? | | |
| Is there a process for obtaining and implementing customer feedback for service improvement? | | |
| Do employees receive regular training on product knowledge and service standards? | | |
| Are employees trained to recommend additional products or services based on customer preferences? | | |
| Is there a process for employees to report product quality issues promptly? | | |
| Do employees check in with customers during the service or dining experience to ensure satisfaction? | | |
| Are employees trained to handle situations where a customer is dissatisfied with a product or service? | | |
| **Facilities and Amenities:** | | |
| Are restrooms and common areas consistently clean and well-maintained? | | |
| Are employees trained to report cleanliness issues or maintenance needs promptly? | | |
| Are employees trained to maintain a neat and organized appearance in their work areas? | | |
| Are temperature and lighting levels adjusted to provide a comfortable environment for customers? | | |
| Are employees trained to offer seating alternatives or adjustments to meet customer preferences? | | |
| **Check-Out/Billing Process**: | | |
| Is the check-out process efficient, with minimal waiting time? | | |
| Is there a systematic process for addressing and resolving billing discrepancies? | | |
| Are customers provided with information about loyalty programs or incentives during check- | | |
| Do employees use the customer's name during the check-out process when applicable? | | |
| Are employees trained to handle check-out errors or discrepancies with professionalism? | | |
| **Farewell Experience:** | | |
| Are customers thanked sincerely for their visit upon departure? | | |
| Are departing customers offered information about upcoming promotions or events? | | |
| Is there a process for collecting feedback on the overall experience during departure? | | |
| Do employees use the customer's name during the farewell process when applicable? | | |
| Are employees trained to inquire about the customer's experience and address any concerns during farewell? | | |
| Is there a protocol for employees to express appreciation for the customer's visit and invite them to return? | | |

| Actions | Applies to my business Y=1/ N=0 | Element Present Y=1/N=0 |
|---|---|---|
| **Post-Experience:** | | |
| Is there a dedicated system for collecting and analyzing customer feedback? | | |
| Are customers encouraged to provide feedback through multiple channels (surveys, online reviews, etc.)? | | |
| Is there a systematic approach to addressing both positive and negative feedback? | | |
| Are there mechanisms in place for identifying and resolving recurring issues based on customer feedback? | | |
| Is feedback used as a basis for continuous improvement in products or services? | | |
| Do employees receive training on how to encourage customers to provide feedback? | | |
| Are employees trained to respond to customer feedback with empathy and professionalism? | | |
| Is there a process for employees to report customer feedback to management for review? | | |
| Are employees trained to follow up with customers who have provided feedback to express gratitude or address concerns? | | |
| **Post-Visit Communication:** | | |
| Is there a system for sending personalized thank-you messages or emails to customers? | | |
| Is there a protocol for sending follow-up emails to customers with a summary of their visit? | | |
| Are customers invited to subscribe to newsletters or mailing lists for future updates and promotions? | | |
| TOTALS | | |

**Congratulations for taking the time to self-audit the presence or absence of the actions you currently have in place and use to offer a customer experience!**

This list is definitely not all-encompassing, may only partially apply to your business, and has a sole focus of measuring if certain elements exist or not, without quantifying their levels of execution. Assessing the level of performance is more suited for mystery shopper audits when the evaluation comes from the perspective of the customer.

Like, for example, using, for each standard, degrees of execution based on:

- the satisfaction feeling *(from angry, unhappy, and disappointed to satisfied, excited, delighted)*,
- the consistency of the delivery *(absent, inconsistent, rarely consistent, consistent, always displayed)*,
- or the classical explained levels of ***below – meeting – exceeding expectations.***

**How to interpret the results:** start by comparing the total score in the "Element Present" column to the one in the "Applies to my business" column?

- ➢ If the applicability score is 75 points (maximum), and your action presence score is below 20 or lower, then you are offering an experience below expectations (33% of the total).
- ➢ If your presence score (based on a maximum 75 points applicability) is between 21 points and 50 points (an average of 45% presence) you are in the "meeting expectations" zone.
- ➢ Anything higher with a score of 51 points of presence or more, places you in the "exceeding expectations" category.

Regardless of the result, you deserve congratulation for being curious about where you stand and how to improve!

# Kick-Off Event Participant Workbook

Offer this tool at the main event or training day to be used as a basis for defining and clarifying the new service elements.

Encourage the participants to capture or add examples of gesture, mimics, reactions, words and phrases that they find suitable with their personality and would feel comfortable implementing immediately.

The HR Lobby
Exceeding Expectations

# Participant WORKBOOK

# welcome to

# personalized learning

your private collection of gestures, words, mimics,tones and mindsets for authentic interactions.personalized

This workbook belongs to:

# the content

# Mapping the Customer Journey

## 1 THE RESERVATION

Present yourself in the best way possible (say your name, ask and use the customer's name, keep the smile on);
Ask the right combination of closed and open-ended questions to collect precious information;

## 2 THE WELCOME

Monitor the entrance and be the first to say hello;
Personalize the welcome based on the information you collected.

hello

## 3 THE AMBIANCE & THE AMENITIES

The most important aspect of the ambiance remains the human presence, make sure it stands out positively;
Prioritize quality over quantity when selecting your decor and amenities;

## 4 THE "HOW MAY I HELP YOU"

Spotlight this right transition from "Welcome" to "Let's do business!";
Let the customer tell you what they need and how;

## 5 THE CONVERSATION & THE UPSELL

Make that small talk whenever possible, it will brighten the engagement;
Be consistent but original with your psell efforts.

## 6 THE TIMELINESS

Match the urgency level of the customer rather than working fast by default;
"Wait a minute, please!" does count as a specific promise of timeframe, don't underestimate it.
.

## 7 THE COMPLAINT & THE RECOVERY

"The customer is the king as long as they behave royally";
A good service recovery can be more memorable than an incident-free experience.

## 8 THE "GOING THE EXTRA MILE"

Start with small, personalized, cost-free gestures like using the customer's name, and remembering their preference;
Don't settle for the pretend personalization (offering the same cake for each customer's birthday), put that extra effort into finding out at least one special detail (from the joining friends, during the reservation: a color, a favorite drink, a preferred flavor);

## 9 THE PAYMENT THE HOT FEEDBACK THE FAREWELL

They all have to be swift and simple, without overcomplicating the process;
"Was everything ok?" is not an inspired feedback question (it's vague and implying).
Always thank the customer!

# The Touchpoints

Capture the most important elements (words, gestures, mimics, tones, mindsets) of each of the touchpoints below, to help you structure the information.

Current State describes how you are handling this touchpoint now, while Desired State describes the improved version you want to implement!

## The RESERVATION (Telephone Etiquette)

| Current State | Desired State |
|---|---|
| | |

## The WELCOME

| Current State | Desired State |
|---|---|
| | |

## The AMBIANCE & The AMENITIES

| Current State | Desired State |
| --- | --- |
| | |

## The HOW MAY I HELP YOU?

| Current State | Desired State |
| --- | --- |
| | |

## The CONVERSATION & The UPSELL

| Current State | Desired State |
| --- | --- |
| | |

## The TIMELINESS

| Current State | Desired State |
| --- | --- |
| | |

## The COMPLAINT & The RECOVERY

| Current State | Desired State |
|---|---|
| | |

## The "GOING THE EXTRA MILE"

| Current State | Desired State |
|---|---|
| | |

## The PAYMENT, The HOT FEEDBACK, The FAREWELL

| Current State | Desired State |
|---|---|
| | |

## MY NOTES

Desired State

# Simplified Luxury Behaviors

Use this section to take important notes and reminders about each of the behaviors below, to help you better and faster transfer the knowledge to practice!
REMEMBER: there is always a better way to act, choose that one!

## BELOW MEETING EXCEEDING EXPECTATIONS

## The SMILE

## The NAME

## A MINUTE

## From "NO PROBLEM!" to "MY PLEASURE!"

## Be PROACTIVE!

## THE "NO, BUT…"

## ANTICIPATING NEEDS

## ASKING QUESTIONS

# The REINFORCEMENT

Use this section to capture ideas for your reinforcement plan! Actions to help you train, practice , rehearse the new behaviors on a regular basis!

## CURRENT ACTIONS

## REINFORCEMENT IDEAS

# The CELEBRATION

In this section, capture celebration ideas that work best for you and your team! Then move to step 2, planning these actions and turn them into special recognition moments!

## CURRENT ACTIONS

## CELEBRATION IDEAS

# MY COMMITMENT

Use this last page to define your commitment to this service transformation, skills enhancement, behaviors changing, and habits rewriting journey!

## I, ..............................................

commit to support this project by doing the following
(tick what best applies to your personality so your commitment is genuine):

- Understand what are the expectations aligned with this change!
- Read, understand, and practice the new skills that would add value to the service I provide!
- Help my colleagues and my leader throughout the implementation!
- Always strive for excellence, by choosing the best version of my reaction!
- Give myself time to learn and space to make mistakes!
- Actively participate in recognition and celebration activities!
- Share success stories and best practices!

# My NOTES

Use this section to capture interesting points, ideas and actions!

My name is Cristina DRĂGAN, and I am an HR Hospitality Consultant, passionate about human resources and personalized customer service.

This unconventional combination of career interests is the result of 13 years of exposure to luxury hospitality. I have worked with amazing HR Teams, in industry flagship brands like JW Marriott and The Ritz-Carlton, being part of deeply diverse cultures across three different vibrant cities: Bucharest, Venice, and Dubai.

I simplify luxury service standards and HR practices so that entrepreneurs and small business owners, who have limited access to resources, can implement them successfully.

I break down complex 5* service habits into gestures, mimics, words, and attitudes to make learning and practice transfer easier. I make exhausting HR concepts easier to execute by focusing on personalization and authentic care for the employees.

Thank you for your contribution to Normalizing Great Service!

The HR Lobby
Exceeding Expectations