

THE 12 PRINCIPLES WORKBOOK

A resource for the book *From Impressed To Obsessed* by Jon Picoult

A Message From Jon

When I wrote *From Impressed To Obsessed*, I made certain to incorporate into the book plenty of specific, tactical ideas that readers could immediately use to apply the 12 Principles to their roles.

This workbook will help you go even further. Organized into twelve sections (one for each principle), the workbook will walk you through a series of questions to help trigger additional ideas about how your business can capitalize on the 12 Principles.

Use this workbook to guide your own personal reflections, or to brainstorm with your team. Either way, I'm certain it will help you reimagine your organization's customer experience by getting you to look at your business from an entirely new angle – *through the lens of the 12 Principles*.



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Principle #1 – Create Peaks and Avoid Valleys

Let's start by considering how to create more memorable peaks for your customers by "spreading the pleasure." Can you think of opportunities to remind customers of value they've derived from your business, creating an "echo" of an earlier peak?

Can you think of a way to communicate with customers to heighten their anticipation around goods, services, or some other source of value that they'll soon receive from you (creating an anticipatory peak)?

Is there a way you could parcel out good news, positive developments, or favorable status updates, thereby creating multiple peak moments from a "single source" of goodness?

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Remember the “Tentpole Effect” described in the book? What’s going to be the Tentpole in *your* customer experience? What is the one touchpoint or overarching feature that is going to be so clearly exceptional, it will help elevate customers’ impressions about the entirety of the experience.

Now let’s consider ways to “compress the pain” and minimize the number of memorable valleys in the customer experience. Is there “bad stuff” in the experience that could potentially be lumped together into a single, unfavorable touchpoint (such as aggregating paperwork or information requests made to the customer)?

Are there transitions in the customer experience that could be minimized or compressed, thereby helping to reduce the number of perceived valleys in the encounter? For example, are there opportunities to reduce hand-offs between different departments or company representatives?

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Principle #2 – Finish Strong

Are there any specific episodes in your customer experience that you know end on a less-than-favorable note? If so, can you think of potential enhancements that would help forge a more positive impression at those final touchpoints?

If you identified experience endpoints in the previous question that you can't think of ways to improve, then ask yourself: Is there a new interaction point that you can tack on to the end of that experience – something that might not be essential to the encounter, but would be beneficial because you know it would leave a more positive concluding impression?

Are there unfavorable parts of the experience that are currently positioned toward the end of the customer's encounter? If so, and you can't think of ways to eliminate those unfavorable parts, can you at least think of ways to shift them earlier in the experience, so it's more likely that customers will forget them (and the associated negativity)?

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Principle #3 – Make It Effortless

Take a moment to think about the most common reasons *why* customers contact you (not to make a purchase, but for some other reason). Now think about those categories of reasons and ask yourself: Should they all really exist? Can you think of something you could do differently – upstream, earlier in the experience – that would largely eliminate the need for customers to contact you downstream (e.g., better expectation-setting at point-of-sale, or easier-to-understand product assembly/installation instructions)?

Are customers frequently contacting you to inquire about the status of something, such as an order, a repair, a return, or a request they've previously made? If so, are there ways you could more proactively communicate status updates to customers, so they don't have to invest the effort in contacting you about it?

Unnecessary effort can be triggered when customers have to follow-up after no one has responded to their original inquiry. Have you set clear expectations across your organization with regard to responsiveness (i.e., how quickly e-mails, voice mails, texts, etc., should be replied to). Have similar expectations been established for staff who serve *internal* customers?

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Are there situations where you're asking customers to provide information you already have in your possession, or you're asking them to provide the same information multiple times? Eliminating those types of redundancies will help reduce customer effort.

Are there common customer episodes (things customers frequently do, or ask of you) that require hand-offs in your organization – creating more effort for the customer as they need to work with multiple parties to get something accomplished. If such scenarios exist, how might you reduce the number of people/departments that need to be involved to help the customer, so the interaction is more effortless for them?

Are you creating unnecessary, unproductive effort for your employees (which, in turn, makes it difficult for them to deliver an effortless experience to customers)? Consider business practices, policies, or toolsets that make it difficult for your staff to consistently deliver a great customer experience. Are there changes or enhancements you could explore that would make it easier for employees to do their jobs?

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Principle #4 – Keep It Simple

Are there times where your customer has to choose between many options, potentially creating decision complexity for them? Can you think of ways to reduce the number of alternatives, chunk them into smaller groupings, or sequence the decisions from easy to more difficult?

Is there additional information you could provide to customers that will help them navigate choices – a better description, for example, of the types of situations or circumstances where one alternative might be better than another?

Do you have print or digital content (e.g., websites, proposals, contracts, account statements, correspondence, marketing materials, etc.) that is visually unappealing, jargon-filled, or otherwise too difficult to understand? Using the techniques described in Chapter 10, can you think of ways to improve this content, so it is easier for customers to navigate and interpret?

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Principle #5 – Stir Emotion

What emotions do you think your customers want to feel at key points in the experience – at point-of-purchase, for example, or when requesting service/support? Is your current customer experience delivering those emotions and, if not, what could you do differently to elicit the desired reactions?

Are there opportunities to accentuate positive emotions in the customer, perhaps by celebrating a milestone, creating a sense of anticipation, or simply making them feel more like a VIP?

What negative emotions might customers be carrying with them as they enter an interaction with you? Might they be anxious or worried about something? Might they feel stressed, confused, or embarrassed? Could they be suffering from buyer's remorse, unsure if they've made the right decision? If any of these negative emotions might be present, consider what you could do to flip them on their head – to replace anxiety with assurance, fear with confidence, confusion with clarity, etc.

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Do you have any business policies that might instill “fear” in customers, such as inflexible contracts or restrictive return policies? If so, consider how these could be adjusted to still address the business’s needs, but in a way that doesn’t inject the experience with negative emotion.

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Principle #6 – Give the Perception of Control

If there are multiple steps or episodes in your customer experience, do customers know what to expect? Are you taking time to communicate those expectations, be it in writing or verbally? Consider parts of the experience where your customer might feel some ambiguity about what the next step is, and then think of new communications you can insert into the experience to remove some of that uncertainty.

The absence of choice deprives customers of the perception of control. Are there situations in your customer experience where people would appreciate the opportunity to influence the interaction, however insignificantly, by exercising the power of choice? Are there even “token” options that could be presented to customers in those situations, so they feel as though they’re exerting some control over the encounter?

Do your customers know who to contact (and how) if they need some of type support? If that’s at all unclear, consider ways to make those contact avenues abundantly clear to customers, so if something doesn’t go as planned, they at least feel like they have control to reach someone who can assist them.

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Principle #7 – Be an Advocate

What irks people about your industry, what commonly annoys or frustrates them? Now consider if you can orient your business strategy around a “crusade” to eliminate some of those annoyances and frustrations – essentially advocating for changes in traditional industry practices that customers will view as refreshing and welcome improvements.

Do you treat longtime customers as well as entirely new ones? If not, think carefully about whether that approach is worth it, given the negative sentiment it might create with existing (and perhaps very loyal) customers. Are there perks provided to new customers that you can extend to existing ones? Or, are there entirely new perks you can offer to loyal customers which aren’t available to new ones?

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Do you make money when your customers make mistakes? If they're not fully utilizing the products and/or services that they've paid for, do you remind them? Do you provide them with advance notice before automatically renewing their services/contracts? Think of situations that might be good for your top line (in the short-term), but would create regret or frustration on the part of your customer. Those are scenarios that will undermine customer advocacy, and should be reengineered in some fashion.

How do you foster accountability and ownership in your organization? Have you clearly set expectations with your staff about what that means (the "Velcro" approach to ownership described in Chapter 13)? Are there business procedures or job designs that actually make it impossible for staff to take ownership for helping a customer? If so, consider how those could be altered so you're better institutionalizing a culture of ownership.

To help customers see that you're watching out for them, is there information you could be more proactive in sharing with them (such as status updates, relevant tips, replenishment reminders, etc.)?

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Principle #8 – Create Relevance

What do your customers *really* care about? Don't answer by just citing the product or service you happen offer. Rather, think about the need those products and services address in the customer's life. Can you think of ideas for enhancing existing offerings, or introducing entirely new ones, that target what your customers really care about?

What do your customers do immediately before or after they purchase, use, maintain, or get service on your business offering? Are there opportunities for you to expand the value you provide by helping customers with those tangential (but still very relevant) activities?

Helping customers discover something they didn't know (but matters to them) is another way to achieve relevance in the experience. Can you think of information or insights that you could more readily share with customers, to help them learn something new and feel better off as a result?

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Principle #9 – Pay Attention to the Details

Look at your customer experience through a magnifying glass. Are there any small details that – when you really think about it – are inconsistent with the type of experience, the ambience you’re trying to create? If so, consider what tweaks you can make to those details so there’s no risk that (even if subconsciously) they’ll undermine the brand impression you’re trying to create.

Now think about the converse. Are there details, small touches in the experience, that if added would help elevate the quality of the interaction, making it appear more polished or professional?

How are you reinforcing the importance of attention to detail across your workforce? Are there new ways you could impress upon your staff the importance of a detail-orientation in creating the type of customer experience you aspire to deliver?

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Principle #10 – Personalize the Experience

How are you capturing information about your customers that may be helpful in the future, to better personalize the experience to their needs? Can you think of information that's not currently being captured but should be?

How are you getting information that was previously captured about customers into the hands of people who will soon interact with them? Is that information recorded in a way so that the people who *should* be referencing it (e.g., sales or service staff) can easily access it when needed? If not, how might you go about staging that information in a way so it's more useful "on the ground" when and where your team is delivering the customer experience.

Are there requests or customizations that your customers make which can be used to better personalize their future experiences? For example, there might be information reports that they ask for at the same time every year, or special accommodations they request when obtaining service.

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How do you keep track of customers' life events or other milestones, so you can engage them in a more personalized fashion? If you're not doing this already, how might you obtain and record this type of information in the future? What types of events and milestones would it be helpful to know about, enabling you to engage with customers on a level that they might find surprising (and impressive).

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Principle #11 – Deliver Pleasant Surprises

Think about the interaction patterns that customers associate with your industry’s most common experience episodes (from purchase, to product usage, to service and maintenance). Is there an opportunity to flip that script in some fashion, to do something a bit unexpected (even if it’s just a small gesture)? What could be a signature element, a branded act of kindness, that you could surprise your customers with?

Think about the experiential patterns that define your industry in an unfavorable way – the things many customers dislike, but tolerate because it’s just the “way things are done.” Now imagine if you could start your business from scratch. How would you design the experience to flout those conventions, to eliminate those common frustrations? Are there any aspects of that “clean slate” approach that you could adopt today, in part or whole? Something that would pleasantly surprise customers because it’s a positive departure from typical industry practices?

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Principle #12 – Recover with Style

When there's an experience failure with your customer, what's the *real* impact on their lives – beyond just the absence of your product or service? Might that change how you think about making the customer “whole” after an experience failure? In those situations, are there other forms of support you could provide to the customer, helping to overcome whatever disappointments or inconveniences they suffer due to the failure?

To what degree are your staff truly empowered to take ownership for experience recovery? What could you do differently to equip them with the tools, motivation, and confidence they need to promptly address experience failures and turn them into brand enhancers?

Have you attempted to quantify the lifetime value of your typical customer? How might that influence what you're willing to invest to make things right for a customer who has been wronged?

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When experience failures occur, how are you ensuring that – once the problem is resolved – the organization is stepping back to consider the root cause of the issue, and then address it? Is there a discipline within the organization to use every experience failure as a learning opportunity. If not, what could you do to instill that ethic in your team?
