

# THE Quarterly



N°4

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# THREE STEPS TO CREATING LIFELONG CLIENTS



By Jon Picoult  
Facilitator  
Design Leadership Workshop, Ojai

## DLN MEMBERS AND PARTNERS ARE EXPERTS AT DESIGNING SPACES—BUT HOW ABOUT DESIGNING EXPERIENCES?

That was the focus of the second annual Design Leadership Workshop, held this past May at California's Ojai Valley Resort. There, DLN Members and Partners learned

about the customer experience design strategies employed by some of the world's most successful brands—and how to apply those techniques to their own client experiences. Leading the workshop was customer experience expert Jon Picoult, founder of Watermark Consulting and author of the bestselling book

**FROM IMPRESSED TO OBSESSED: 12 Principles For Turning Customers and Employees Into Lifelong Fans.** Here, Jon outlines a few of the key focus areas that were highlighted at the workshop and enumerates what they mean for the management of your business.

## 01) Focus On Memory Making

What great companies recognize is that they're not just in the business of shaping people's experiences, they're in the business of shaping people's memories. Indeed, how people remember their experience with your firm is even more important than the experience itself, because it's those memories that will drive the repurchase and referral behavior that's the lifeblood of any thriving business.

### PRO TIP: FINISH STRONG

Yes, first impressions are important—but final impressions are even more so. The way our brains are wired, the last thing that happens to us in an interaction exerts a disproportionate influence over our perceptions and memories of that encounter. Here are a few ways you can capitalize on those memory mechanics to elevate the impression you're leaving on clients:

- Conclude the client contracting process with a personalized, handwritten note of thanks. It's a thoughtful gesture that many clients won't expect, and probably rarely see from other businesses they patronize. As such, it'll stick out in their mind and help forge a positive impression as they begin their engagement with you.
- Finish client meetings on a confidence-inspiring note by clearly **recapping key decisions, outstanding items, accountabilities, and time frames.** When clients see that you're on top of everything, that nothing is left to chance, that everyone on the project knows who's responsible for what—it cultivates a refreshing level of trust, coming out of even the longest, most arduous meetings.
- Inject a branded act of kindness into the final project reveal— a thoughtful gesture, such as stocking a client's new wine refrigerator with their favorite spirits, or placing their children's favorite treats in the kids' newly decorated bedrooms.



## 02) Focus On The Front-End

One of the best ways to create a great, effortless client experience is to **get things right from the start**. By carefully engineering the upstream parts of the experience, you'll reduce the risk of unpleasantness downstream. Why? Because when you do things right at the front-end, it helps avoid client pain points later on. (After all, the best kind of client service is the kind you never need, because everything just works exactly as expected.)

### PRO TIP: PLAN WELL AND SET CLEAR EXPECTATIONS

One of the best ways to shore up the front-end of the client experience is to **invest time in pre-project planning and expectation-setting, as that helps to both create peace-of-mind for clients** as well as guard against subsequent unpleasant surprises. Examples of opportunities in this regard include:

- Provide a visual roadmap to clients early in the engagement that helps them understand the different parts of the project, accountabilities, and estimated time frames. Just knowing how the process is going to unfold will make clients feel better about the experience (even if you don't actually improve the underlying process!).
- **Keep clients informed with regular, scheduled updates**, be it by phone, e-mail, or text. Expectation-setting is important, but it has to be accompanied by frequent status communications that obviate the need for clients to reach out to you for an update.
- Consult with trade professionals and product suppliers early enough in the process to help ensure that design plans aren't just aesthetically appealing, but can also be realistically executed within the client's budget and time frame parameters.

## 03) Focus On Emotions


People's perceptions of your client experience will largely be influenced not by their rational evaluation of the encounter, but by the emotions it elicits. For this reason, it's important to look at your client experience not just through a logical lens (i.e., was the project delivered on time and on budget?), but through an emotional one (i.e., how did the client feel after their interactions with my firm?). Also worth noting—experiences laced with emotion are more memorable. So, by stirring positive emotions in clients, you'll be creating experiences that they don't just enjoy in the moment, but also remember fondly long into the future.

### PRO TIP: ACCENTUATE THE POSITIVE, MITIGATE THE NEGATIVE

Stirring experience-enhancing emotion in the client experience isn't just about eliciting positive emotions, it's also about mitigating negative ones. Here are some ways to accomplish both of those tasks:

- **Make your clients feel special by giving them your undivided attention** during meetings and calls (no glancing at incoming texts!). During each interaction, make that client feel as though they are the only person in the world.
- **Respect clients' attachment to certain possessions** that they wish to retain in the future-state space. Such items may not be Instagrammable, and their retention might mean you miss out on a revenue opportunity—but on an emotional level, accommodating such client requests is almost always the right answer.
- Pay particular attention to situations where clients may experience negative emotions—be it feeling uncertain when selecting a design professional, or overwhelmed when faced with a multitude of design choices, or anxious when the renovation begins and the hammers start swinging. Provide some extra hand-holding to clients at these times, and focus on replacing fear with confidence, worry with serenity, and confusion with clarity.

The benefits of a consistently great client experience cannot be overstated. It's a strategy that helps raise revenues and control expenses, thereby fueling long-term profitability. Importantly, however, success in this regard isn't just about the aesthetic that design professionals create; it's also about the end-to-end experience that they provide to clients.

By dedicating appropriate attention to that latter component, you'll be able to better differentiate yourself from competitors—creating a brand experience that turns more sales prospects into clients, and more clients into lifelong fans. 



*Jon Picoult is founder of Watermark Consulting, a customer experience advisory firm that helps companies impress customers and inspire employees, creating raving fans that drive business growth. Author of "FROM IMPRESSED TO OBSESSED: 12 Principles for Turning Customers and Employees Into Lifelong Fans," Picoult is an acclaimed keynote speaker, as well as an advisor to some of world's foremost brands. Learn more at [www.jonpicoult.com](http://www.jonpicoult.com).*