Claudia Gere & Co. LLC
Info@ClaudiaGereCo.com
Tel: 413 359 0003

Customer Success Engagement Roadmap

The Five Stages of Customer Success Engagement

There are five stages along the path of engaging your customers one-by-one as you work with them successfully.

1. References
2. Referrals
3. Endorsements
4. Success Stories
5. Case Studies (and a possible book)

Each of these opportunities will help you generate more prospects and make it easier to close sales. As you've probably heard: We're living in the age of relationship marketing. You can't push products or services at people, you have to cultivate trust. Using these techniques will help you cultivate your relationship with your clients. Here is a quick overview of the different strategies.

1. Customer References

Most people know that there is gold to mine with the customers they've already worked with successfully. But let me ask, how many of you have asked if your customers would be willing to be a reference so new customers can hear from someone other than you that you are trustworthy and competent. When someone gets a proposal from you or is evaluating your services or product in some way, hearing from one of your previous customers who talks about their experience is very powerful. It can be scary to ask them. There are two prominent reasons people don't. You might feel as though you're bothering them. They've been paying you money as a consultant, or in some other capacity, why would they offer their time for free? Or maybe you're afraid that it will bring up unresolved issues.

2. Customer Referrals

You can also ask customers you've worked with successfully if they will recommend your services to their colleagues, to others who could benefit from your services.

Asking your customers for referrals is one of the most prolific ways to increase your list of prospects. There are a number of people who talk and have written books about the power of

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asking your customer for referrals. You can check out Matt Ward (http://www.mattwardspeaks.com/, linkedin.com/in/mattwardspeaks, and his book on Amazon: https://www.amazon.com/s?k=matt+ward&i=stripbooks&ref=nb_sb_noss_1).

These first two techniques, references and referrals require one-on-one engagement between your customer and their associates or yours, then your engagement with their associates or referrals. This approach can be very time-consuming with very limited reach. Let's look at the next three ways to leverage your customer successes to reach a broader audience.

3. Customer Endorsements

One very simple way to leverage your successes is by getting a quote from your client. You can ask your clients to say something positive about working with you. We all know these quotes as endorsements, or testimonials, and in the book industry, we call them blurbs. You might already have a sprinkling of quotes on your website. You can go to my website and see them (claudiagere.com). You might list them in your proposals, on your speaker one-sheet.

These endorsements can be as brief as one sentence. And should be no longer than three (unless the benefit is *that good* and takes longer to demonstrate.).

Getting these quotes is easy. When a client is happy with your work, they *like* to let you know, especially right after they've completed a project with you. The worst time to ask for an endorsement is when you're negotiating a new contract.

1. If your clients aren't willing to give you endorsements, then there are two possible explanations: They're not happy with your work.
2. They have a company policy against endorsing any products or services.

If your client isn't happy with your work, don't you want to know? Don't you want to fix the problem or the perception? Or find out what you can do better next time.

When you ask a client for an endorsement, you want them to include a benefit. So you want to ask questions that help pull out how you helped them.

- What did you find most helpful in the way we worked together?
- How did you help them change what they did or how they did it?
- What was the one key benefit of that change?
- Were there quantitative changes (such as employee retention figures, increased income, and so forth)?

When you ask these questions, you will begin to find out what it is that differentiates you, your strengths, your skills. Your clients can tell you how to market yourself. There is nothing more powerful that the authentic words of customers who have experienced the benefits of working with you.

4. Customer Success Stories

A success story is just an expanded endorsement. Yet, because of that additional context, the results will be more believable and more convincing. And less self-serving than a quote. A good customer success story makes it look like they did it all themselves got to their successful state by implementing changes. It just so happens that you were the one driving those changes. Google customer success story and you will find a host of websites that tell you how to write them. Here is my formula:

1. **Background or Context.** Who is the client or company? Their industry, specialization, how do they help people? What differentiates them. This is where you make them look really good, as long as it's still believable, of course. A success story makes your client look good.
2. **Problem.** What had changed in their environment, business strategy, the economy, their industry, the competitive landscape that they needed to address? What were your client's challenges? What kept them awake at night? What was it that brought them to hire an outside consultant, to hire you for your services? Or to use your product?
3. **Solution.** How did they (with your help) meet those challenges? What was the process you followed, the journey to success?
4. **Lessons Learned.** What were the positive outcomes? The lessons learned, the path forward, the decisions made. This is where you congratulate your client for taking difficult steps, for rising to the challenge.

Google Customer Success Stories and you can find some excellent examples. One company that uses success stories well is SalesForce.com. You'll find specific links for a variety of the ways they help their customers succeed. https://www.salesforce.com/products/marketing-cloud/customer-stories/#!page=1

You can also learn by looking at things that don't work. Two mistakes that you do not want to make:

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1. Do not make the story all about you and what you did…notice in the stories you read, how little is said about the who provided results, and more about the effect of the results.
2. Do not publish the story without getting written permission from your client and being sure your client is happy with it.

Promise your clients that you want them to be happy with their story before you write it, and I don't publish it unless they are.

A well-crafted success story draws on the kinds of problems many people face and makes your client look smart for doing something about it, tackling the issue in such a smart way. When you do that, your customer will love it. It makes them feel important, that you took the time to tell their story.

There are so many things you can do with success stories. Put them on your website, submit them as articles, send them out as press releases. You can highlight a quote from your client in the story as a pull quote, as an endorsement, something that can stand out as important. You can weave success stories into your in-person sales narrative, into talks on your topic as examples of what works and what doesn't.

5. Customer Case Studies

Most coaches do something they call an intake. When you're writing a project proposal, you usually have to interview the customer. You ask a lot of questions at the beginning to identify their needs. Rather than telling them the solutions, you help uncover their needs before you recommend the path to change. For some, you don't need to make a recommendation, you just have to confirm what your client already knows. Sometimes they just need permission to do what they know they need to do, to fire someone, to reorganize, grow, shrink operations, redefine services and so on.

Every time you talk with your client, ask for their permission and *record* the session. You will be capturing content that otherwise might cost you a fortune to capture and create. This is the real gold that you can mine while working with your clients. The problems and challenges they identify will be universal. Some will be industry specific, or relevant to the economy or other circumstances.

Following a project, ask your customer to participate in a debriefing (or post-mortem). You can ask for areas where you can improve. You might find you have some blind spots in how or what you offer. This also helps to build a relationship of openness and trust with your client. You can

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ask about next steps, if there are other areas they wish to improve, or if there are other changes they see on the horizon or areas you didn't get to. And that can lead to more business.

Recording Your Interviews. Interviews on Zoom make it so easy. You can use the video or the audio recording and create in your settings to automatically record at the start of your meetings, and automatically record to your computer. For in-person interviews you can use your smart phone, or for longer interviews, a digital recorder. There are many on the market that you can plug into your computer to upload the digital recording.

Turn Interviews into Case Studies

Using the customers responses to both the intake and debriefing interviews (and any others that provide insights), follow this formula to turn your interviews into case studies.

Describe Business/Industry:
Ask questions get a general description of the business size, sector, location(s), products/services. Also ask about the competitive landscape and challenges in the industry.

Customer Problem/Challenges/Situation:
Ask about when he or she first realized something was going wrong. What were the first symptoms? How did he or she react to these problems? What were the visible consequences of these problems? What were the hidden or underlying consequences?

Implementation:
Recount the steps, challenges, successes and failures of implementing the solution.

Solution:
Describe the solution and results of the solution.

Success:
What does success look like? Describe the before and after.

Benefits/Lessons Learned:
Reiterate the benefits of the solution and/or the lessons learned.

When you make a habit of conducting and recording these debriefings with your customers, over time you might find that there is a process you go through consistently. When you start to analyze that process, maybe you can put a name to it, maybe you can create an acronym that leads your customers through your process. And that can be the foundation for a book.

Turn Case Studies and Success Stories into Your Book

At the foundation of many authority-building, business-building books are the stories that illustrate the important strategies for successfully implementing your strategies. You can include entire case studies, or sprinkle shorter success stories that illustrate the problems and then how your different strategies helped solve those problems.

All of these techniques require interviewing your clients to some extent, so let's

Resources

I use an Olympus Digital Voice Recorder. They range in hours of recording time and battery hours of recording. I also suggest using a lavalier mic. Any quality single point stereo mic will do.

Here is a list of some transcription services. Check out which work best for you.

Otter.ai
This is a free (with upgrade options) online transcription. You can upload a voice recording or video and receive a transcription using their voice recognition software.

Rev.com
They offer one transcription service at 99% accuracy that costs $1.25 per minute of audio or video. The second at 80% accuracy, costs $0.25 per minute of audio and uses automated transcription. They also offer Rev.ai, which costs .035 per minute and uses a speech to text algorithm.

Upwork.com
If you're not a writer, you might want to send your recordings to a ghostwriter, and specifically customer success stories or case studies. Those are writer specializations. Be sure to check references and ask for examples.

Contact Me

Feel free to contact me with questions. You can set up a consultation on my calendar:

http://tiny.cc/BookGere-15min

You can see what I offer on my website, **https://www.claudiagereco.com**. Or if you want to learn more about how to turn your case studies into a book, check out **https://www.claudiagereco.com/speaking/aspiringauthorsprogram/**