

Workbook Companion for

*A simple, yet powerful
customer experience model.*

THE
GUARANTEED

**CUSTOMER
EXPERIENCE**

How to Win Customers by
Keeping Your Promises

JEFF TOISTER

To order a copy of the book, go to guaranteedexperience.com

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About Jeff Toister

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Blog: www.toistersolutions.com/blog
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Introduction

This workbook is designed to help you implement concepts from *The Guaranteed Customer Experience* book.

The book itself presents a model that makes it easy to win and retain customers. The secret is applying the framework of a guarantee to customer experience to ensure promises are consistently kept.

Each worksheet corresponds to a different chapter in the book. The specific chapter is identified in the exercise title, such as “Chapter 3: What promise will set you apart?”

You are encouraged to read the chapter prior to implementing that chapter’s exercise so you’ll have a foundational knowledge of the concept.

Additional Resources

These resources can help augment the exercises in this workbook.

Customer Service Tip of the Week

This reminder service delivers one customer service tip each week via email.

To sign-up, visit www.toistersolutions.com/tips

Inside Customer Service blog

Jeff Toister’s blog delivers analysis, tips, and trends to help you unlock your customer service team’s hidden potential.

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Customer Service Training Videos

Jeff Toister has partnered with the online video training portal LinkedIn Learning to create engaging, high-quality customer service training videos.

To view the courses, visit: www.linkedin.com/learning/instructors/jeff-toister

A LinkedIn Learning subscription is required, but you can obtain a free 30-day trial by visiting www.linkedin.com/learning.

Chapter 1: What problem does your customer have?

Overview

Customers buy our products and services to solve a problem. The goal of this exercise is to create a one-sentence problem statement that clearly describes a common customer problem that you can solve.

Step 1: Identify a problem

Here are some questions that can help identify a customer problem:

- What problem do your customers discuss most often?
- What is the reason your customers choose you over other options?
- What does your customer do with your product or service?

Customer problem:

Step 2: Write a problem statement

The statement should be written from your customer's perspective, focusing on their problem rather than your viewpoint.

Start your problem statement with the words, "I need to." Imagine what your customer would say as they describe their problem. Here are some examples:

- Buc-ee's (gas station convenience store): "I need to use the restroom."
- The Simple Coffee Shop: "I need to meet a friend for coffee."
- Amazon: "I need to get something quickly."

Customer problem statement:

Chapter 2: Evaluate your existing guarantees

Overview

This exercise will strengthen your understanding of the broad definition of a guarantee. Your organization likely has existing guarantees, and taking a few moments to identify and evaluate some of them will start moving the Guaranteed Customer Experience from theoretical to practical.

Step 1: Brainstorm a list of existing guarantees

Brainstorm a list of existing guarantees. These guarantees might exist at multiple levels of the organization or in multiple departments. For example:

- Customer experience vision statements
- Marketing slogans
- Warranties against product defects
- Satisfaction guarantees
- Customer service standards

Step 2: Evaluate each guarantee

The next step is to evaluate each guarantee using the following questions:

1. What problem does this solve for the customer?
2. What promise does it make?
3. How often is that promise kept (on a percentage basis)?
4. What is the recovery plan if the promise is not fulfilled?

Guarantee:	
Problem solved:	
Promise made:	
Promise kept %:	
Recovery plan:	

Chapter 3: What will you promise that will set you apart?

Overview

This exercise will help you identify a promise you can make to your customers. Don't worry about getting the wording just right—we'll do that in the next exercise. The important thing right now is to identify a promise.

Step 1: Review your customer problem statement

Take a moment to review the customer problem statement you wrote in the Chapter 1 exercise on page 4. It might help to re-write it below.

Customer problem statement:

Step 2: Promise to solve the problem

Now imagine a customer is sharing this problem with you in a conversation. They're worried about solving the problem and are looking for relief.

What can you promise to help them feel better?

For example, let's put the promise Zinus made in Chapter 3 in a conversational format. "We can deliver a great-looking bed by Tuesday night. It fits your budget, it's designed to last for a long time, and you can assemble it quickly."

Chapter 4: How can you make your promises great?

Overview

This exercise will help you further refine the promise you identified in the Chapter 3 exercises on page 6.

Step 1: Categorize your promise

Start by deciding which category your promise fits into:

- **Brand promise:** what customers can expect from your organization or brand.
- **Product promise:** what customers can expect from a product or service.
- **Personal promise:** what customers can expect from you.

Step 2: Evaluate your promise

The next step is to evaluate your promise against the three elements of a great experience promise.

Is your promise:

- Valuable to your customers?
- Specific?
- Realistic?

Step 3: Write your final promise statement

Chapter 5: Calculate your customer math

Overview

Calculate your "customer math" to understand the impact of customer experience on the bottom line.

Step 1: Determine the time period

Decide whether you want to run the calculation for a week, month, quarter, etc. It's best to run this calculation with the same frequency that you create other financial reports.

Step 2: Calculate your net change in customer value

	Number of customers	x	Average value*	=	Total value
Customer base					
				+	
Add new customers					
				-	
Subtract customers lost					
Net customer value					
Change in customer value					

*The average value is the average amount of revenue that customers bring in for the time period you are measuring. For example, if the average customer spends \$25 per month, then your average monthly customer value is \$25.

Chapter 6: Design a process to keep your promise

Overview

PDCA is a reliable tool that can help you design a new process or modify an existing one to ensure your promises are kept. PDCA is an acronym that outlines four stages:

- Plan
- Do
- Check
- Adjust

Plan

Create a plan to keep your promise. Try asking, "How can we keep our promise?" (Or, if it's a personal promise, "How can I keep my promise?")

Do

The next step in the PDCA model is to implement your plan on a trial basis. This gives you the opportunity to test it before you conduct a large-scale rollout.

Check

Evaluate the results of your trial run and verify whether your promises were consistently kept. You'll usually find opportunities for improvement.

Adjust

Use data from your trial run to make adjustments. This gives you a chance to strengthen your promise-keeping process before conducting a widespread rollout.

Chapter 7: Create an experience monitoring system

Overview

An experience monitoring system is an essential part of delivering a Guaranteed Customer Experience. It will help you keep your promises and avoid service failures. And if something does go wrong, you can quickly detect and fix the issue.

To create an experience monitoring system, start answering the two questions:

What promise are we making? (See page 7)

How do we know we're keeping our promise?

You'll need data to determine if you are keeping your promises. It's also helpful to know how frequently promises are broken. As a reminder, here are a few places where you can often find data on broken promises:

- Account cancellations
- Product return rates
- Delivery tracking records
- Customer service contacts
- Social media mentions
- Online reviews
- Customer service surveys
- Feedback from employees
- Quality inspections

Chapter 8: Describe what a great recovery looks like

Overview

Recovering from broken promises is the final piece of the Guaranteed Customer Experience model. To recap, the model has three elements:

1. Promise
2. Action
3. Recovery

Start with the promise you created (see page 7), and imagine that the promise was broken. It doesn't matter what caused it, whether it was a failure by your company, someone else's fault, or the customer merely perceived an issue.

Answer these two questions about the broken promise:

1. How does the customer feel about the broken promise?
2. What would make the customer feel great again?

There are several ways to get answers to these questions. For example:

- Direct customer feedback.
- Customer empathy.

Here's an exercise that can help you tap into empathy for your customer. Start by imagining once again that your promise has been broken.

1. How does your customer feel?
2. Why do they feel that way?
3. Have you ever had a similar feeling?

What would a great recovery look like?

Chapter 9: Create a recovery plan

Overview

This exercise will walk you through the steps to create a recovery plan.

Start building your recovery process by reconnecting with your customer's "I need to _____" statement (see page 4). Write it below:

Now use these three questions to craft a plan to make things right if something goes wrong:

1. How can you solve the customer's problem?

2. How can you make the solution as easy as possible for your customer?

3. How can you restore your customer's faith in you?

No plan can anticipate every circumstance. Employees might occasionally encounter a broken promise they aren't equipped to solve. A good recovery plan should include a way for employees to use their best judgement or escalate those unusual or difficult issues to someone who can fix them.