

SCORE Customer Experience

How to personalize benefits and drive a better customer experience

We all keep hearing about this expression “customer experience” but where did it come from and why should we even care? Our clients purchase an incredible amount of other products and services such as home furnishings, cars, vacations, legal advice, accounting services and so on...businesses today are doing all they can to drive an improved experience and Insurance will be benchmarked against those other businesses.

I’m happy to present “SCORE Customer Experience - how to personalize benefits and drive a better customer experience. This course was created for employers as much as employees to provide tools, tips and techniques to understand what drives a customer experience and how an improved customer experience also improves your bottom line.

The main objective of this course is to provide an interactive environment to understand what drives a customer experience. Participants will learn how to build an improved customer experience for their clients by personalizing it to their specific needs.

It's time to WOW your customers!

Course plan: SCORE Customer Experience

How to personalize benefits and drive a better customer experience

General information:

- ❑ **Title of this activity:** How to personalize benefits and drive a better customer experience
- ❑ **Length:** 2 hours (static online course, webinar) or 3 hours (onsite)
- ❑ **Number of participants:** N/A
- ❑ **Targeted clientele:** Owners, managers and employees who are most in contact with clients negotiating (both for sales and retention).
- ❑ **Training material:** All of the participants will receive a training guide. The facilitator will use a Power Point presentation as a visual support.
- ❑ **Learning strategies:** This course is deployed as an interactive workshop, with several group discussions and exercises. The participative style of presentation is very important with these types of sessions in order to fully implicate all of the participants in the learning process.

Main objective:

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Specific objectives:

At the end of this session, the participant will be able to:

- Understand and use the benefits of creating “Value” during a conversation with a client
- Learn how to personalize the 8 key factors that drive customer experience for each client
- Adapt their speech to Wow the client

Requirements

Participants need to be open minded about understanding what truly drives customer experience and how to see their products and services from their client’s perspective. No other requirements are needed.

Program

✓ Chapter #1 – Review the benefits of creating “Value” during a conversation with a client

- How do they want to feel when they purchase a product or service?
- What are the differences between customer service and customer experience?
 - Customer experience is a lifetime of interaction, which creates a “feeling” or “emotion”
 - Customer service drives customer experience
 - How do we generate Perceived Value?
 - The 8 keys that drive Customer Experience
- How does customer experience drive product value for the client?
- The things you need, you want, you can’t live without
- How to create value in 3 steps
- Feature, Function and Benefit!
- Your 3 types of clients

✓ Chapter #2 – Best practices to WOW! Your clients!

- Open up the pipeline of communication
- Let’s talk money
- Options Options Options
- Make me feel unique
- The relationship bank
- The insurance jargon
- Features tell, benefits sell
- Cross-Selling / Upselling
- Asking for referrals

✓ Chapter #3 – Dealing with change

- Change vs. transition
- The why! The reasons for change