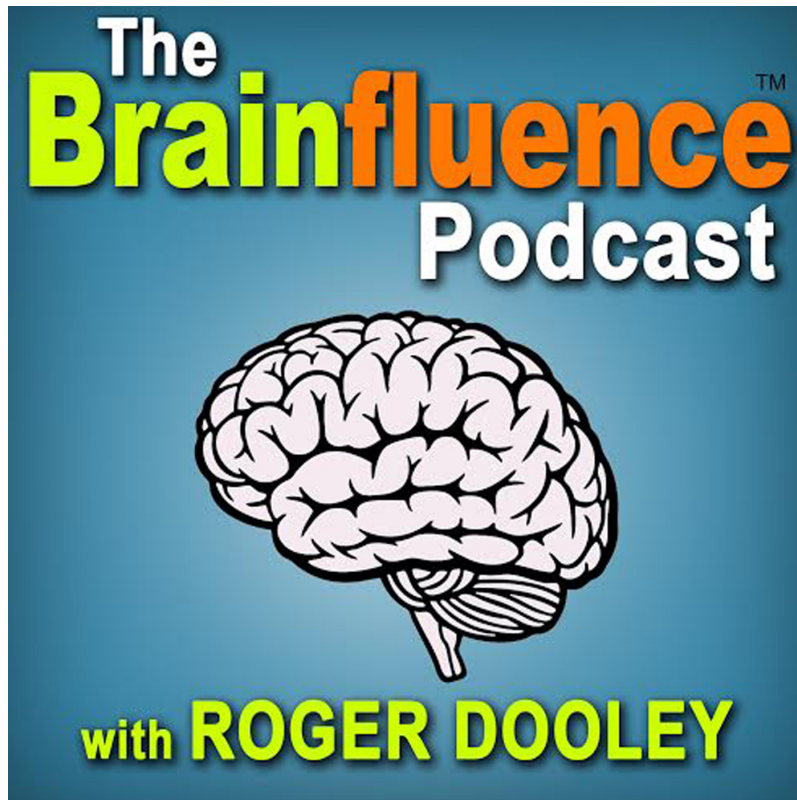


Never Lose a Customer Again with Joey Coleman



Full Episode Transcript

With Your Host



**Roger Dooley**

[The Brainfluence Podcast](#) with Roger Dooley

## Never Lose a Customer Again with Joey Coleman

Welcome to the Brainfluence Podcast with Roger Dooley, author, speaker and educator on neuromarketing and the psychology of persuasion. Every week, we talk with thought leaders that will help you improve your influence with factual evidence and concrete research. Introducing your host, Roger Dooley.

Roger Dooley: Welcome to the Brainfluence podcast, I'm Roger Dooley. One of the first things I learned when I took on my first sales role was that your existing customers are far more valuable to you than new customers. The second thing I learned was that even companies that believe that end up focusing on and incentivizing new customer acquisition. I suppose it's a natural tendency. Once you have a customer it seems like the best way to grow is to add another one. This weeks guest is here to explain not just why focusing on existing customers is important but also how to turn a one-time sale into a long-term relationship in just a few months.

Roger Dooley: Joey Coleman is the Chief Experience Composer at Design Symphony, a customer experience consultancy that specializes in creating unique attention grabbing customer experiences. His clients range from individual entrepreneurs and startups to Fortune 500 companies. He's helped nonprofits and government agencies too, but probably not the license branch that kept you waiting for an hour. Joey's new book is Never Lose a Customer Again: Turn Any Sale Into Lifelong Loyalty in 100 Days.

Joey Coleman: Thanks so much Roger, it's an absolute pleasure to be on the show. I'm a big fan of you and your work and the podcast, so it's a real treat for me to be here with you today. Thank you for having me.

Roger Dooley: My pleasure. Let me ask you, you started your career as a lawyer. What convinced you to turn away from the dark

[The Brainfluence Podcast](#) with Roger Dooley

## Never Lose a Customer Again with Joey Coleman

side and focus on business, or to turn to a different dark side maybe depending on how you look at it?

Joey Coleman: I've had a really eclectic career. During my time I've worked for the CIA, the Secret Service, and the White House. I was a criminal defense lawyer. I taught at the post-graduate level. I ran a division of a promotional products company, and then I ran a branding agency for almost 20 years. Some people look at that and they're like, "Oh geez, he must really have ADHD pretty bad because he seems to be jumping all over the place." As often the case in life, looking back on the road it's much easier to understand the journey. Every job I've ever had was to succeed at that job you needed to be very good at understanding why people do the things they do and how to convince them to do the things you wanted them to do. That's been the common thread that ties all of this together. Each of those positions I didn't leave it because I wasn't enjoying it. I left it because I found something that I enjoyed even more, and that's how I found myself doing customer experience and customer retention.

Joey Coleman: I was running my branding agency and people were asking me to design ads. What was great is we could drive a lot of attention and focus and get new customers to run in the front door, but the clients respectfully weren't doing a good job of keeping them and they'd run out the back door almost as quickly as we brought them in the front. I realized that if I wanted to really help my clients, because a lot of businesses say, "We're here to be your strategic partner. We want to be working with you. Don't think of us as a vendor, think of us as another branch of your business." That if I really wanted to do that, the best way I could do that would be to help them keep their customers.

## Never Lose a Customer Again with Joey Coleman

Roger Dooley: Design Symphony started off more from a branding and marketing and advertising standpoint but then gradually shifted more into the customer experience end of the business?

Joey Coleman: Exactly, exactly because when I started it was oh we need a logo, we need a website, we need a billboard, we need a brochure. Keeping my brochure I'm dating myself here. The crowd's going, "What? They were printing?" Yes folks, we used to have printed brochures.

Roger Dooley: Actually there's a whole host of neuroscience showing that paper is more impactful than digital Joey, so I think brochures are not quite dead yet, though they're used somewhat less.

Joey Coleman: Yes, and you know what's so funny you should mention that, I talk about that a little bit in the book. My good buddy Rohit Bhargava talks about trends.

Roger Dooley: Another guest on the show.

Joey Coleman: Yes, another guest on the show. Great, great guy. One of the trends he's identified is this importance of the physical, tangible mementos. The written word, the print and you're right, it totally aligns with the neuroscience around it. Yes, that's why one of the six tools that I recommend in implementing your first 100 day strategy to keep your customers is to use physical mail, and written notes, and written communications. In an increasingly digital world, the value that people are placing on the physical or the tangible is skyrocketing. Huge opportunity there, you're right.

Roger Dooley: Joey, prominently in the book you make the point that losing customers is the biggest threat facing businesses

## Never Lose a Customer Again with Joey Coleman

today. Is that hyperbole or how would you back that statement up?

Joey Coleman: Well as somebody who knows that your audience appreciates evidence based research and facts as opposed to market or hyperbole, and I am a marketer by training and nature in the past so I'm not saying that disparagingly. Here's what we know. I have studied pretty much every industry imaginable around the world and looked at the data globally, and what we find is that somewhere between 20 and 70% of your new customers will decide to quit doing business with you before they reach the 100 day anniversary. Here's the scary thing. In the world of banking it's 32%. In the world of restaurants it hovers between 45 and 55%. The cell phone industry is 21%. The app industry is actually 80% for apps that you would download on your phone. Car mechanics is about 68%.

Joey Coleman: Long story short these are big, big numbers. What's scary is that there are very few businesses that I run into that can really break their customer acquisition cost down to the penny. They exist but they're pretty rare. What's even more rare is somebody that can tell you what their customer retention rates are. We've all lost customers and I want to help companies stop losing the customer, because in the typical business you don't recoup your cost of acquisition in the first three month. Sometimes you do, especially in a lot of service based businesses you need that customer to be a customer for four or five, six month, maybe even a year before you start to make the money back.

Joey Coleman: If you just look at how many customers are leaving out the back door as quickly as you bring them in the front,

## Never Lose a Customer Again with Joey Coleman

we find that it becomes a numbers game of churn and burn. We're trying to get as many in the door because we have to justify the fact that we're losing so many out the back door. It's the rare company that I've met that has never lost a customer, and the ones that claim that they have, the problem they struggle with is they're not getting the level of referrals or the share of wallet that they want from their existing customers. All of which ties back to the science of how you feel at the beginning of the relationship.

Roger Dooley: Why do you think it is that companies are so focused on acquiring new customers? I mean is there some psychology at work there? I've seen that I think probably my entire career in businesses where there's a relentless focus on new customer acquisition, and obviously there is some focus on customer service and support as well, but all the effort and all of the incentives and so on go into that new customer acquisition phase.

Joey Coleman: Absolutely, I think there are two pieces that contribute to this. You're spot on correct that there's a psychology element and there's also an organizational structure element. Let me briefly describe how we're setup to struggle with customer retention from the outset. On the psychology level we know that human beings are more excited about the chase than the catch. We only need to look to dating lives to see evidence of this. Things are much more excited at the beginning when we're in the courting stages then maybe after we find ourself in a committed relationship. There's no judgment based on that but that's a natural evolution of the human brain and how it works. I think there's some of that.

## Never Lose a Customer Again with Joey Coleman

Joey Coleman: Additionally we have all these structural problems, so you mentioned at the top in the intro, the typical organization highly incentivizes sales. The salespeople are the highest paid people in the business, they are commissioned, they earn bonuses for getting more. It is the rare business that incentivizes their salespeople on getting the right type of customer or a customer that will stay. Additionally as we look in the structure of a business, typically those who are involved in customer service and customer care are some of the lowest paid employees in the company and the highest level of status. In fact in the average business, the entire customer experience or customer service team reports to the sales and marketing team, who then report to the CEO. Imagine a conversation with the CEO being held by the head of sales or the head of marketing, do you think they're going to focus more on the word that is in the title of their name or what someone three chains down is reporting to them? This is just structurally.

Joey Coleman: To make matters worse, we did some research and found that it's hovering just under 50% of CEOs came up through marketing and sales, not through customer care, customer success, customer experience, the operations side. The entire structure of the business is designed to reward acquisition, not retention.

Roger Dooley: Okay, well I think you answered that one Joey. Now early in the book you've got a really interesting chart that shows a hypothetical company valuation based on either 20% customer turnover, which I guess is annual turnover, or 5%. Even 20%, to core on your statistics, actually isn't that bad for most business but if that can be reduced to 5% the valuation is much higher, almost two and a half, three times as high. Can you explain sort of how that works?



## Never Lose a Customer Again with Joey Coleman

Joey Coleman: Absolutely, when in doubt follow the money. People listening may have heard that phrase before and what I love, love about the research that's coming out of the venture capitalist world, and yes you just heard me say that I love something about the VC world. It's that they are starting to value companies significantly based on their churn rate. The data and the chart you're referring to in the book imagines revenues in one company that has a 5% defection rate versus a 20% defection rate. When you extrapolate that out across a five year valuation, the company that was at the 5% defection rate is valued at \$44 million. The company at the 20% defection rate was valued at \$17 million. That improved retention is a 280% differential in the valuation.

Joey Coleman: The reason for this is, and this comes in the software as a service industry where they're doing these valuations, that's recurring subscription revenue so it's really easy for them to chart the value, lifetime value of a customer that continues to pay their monthly subscription. The same philosophy though extrapolates into any business because what we find is the more you can keep your customers, the more your profits increase. If we can improve your customer retention by just 5% the typical business will see a 25% to 100% increase in profits, not revenues, profits. Now this isn't just Joey's number right, this comes from research out of Harvard Business School, Stanford Business School, and Bain and Company. What they found is that when we keep our customers longer not only do they give us more money, but they come to know us better and they refer more business and more friends, and they increase their share of wallet. Not to mention we are able to recoup all that marketing and sales cost and we don't have to keep selling to them.



## Never Lose a Customer Again with Joey Coleman

Joey Coleman: One more statistic because I don't want to overwhelm your audience with statistics, but I know this is a science fact based kind of audience, across all industries you're likelihood of converting a prospect to become a customer averages between 5 and 20% when you have a cold call. What we did is we took it across a bunch of industries, combined it, and we found that it was 5 to 20%. Your likelihood of selling to an existing customer skyrockets to 60 to 70%. All the math shows, and the reason I focus so much on these stats and we can move on from the stats conversation now, but the reason I focus so much on the research and the data and the statistics in the book is all too often discussions of customer experience and customer service are really touchy feely. It's like oh we need to care about how the customer feels. It'll make us feel better if we make them feel better and kumbayaish.

Joey Coleman: That's really valuable and there's a lot of truth to that as far as human emotions and how we feel when we're taking care of another human being, but I also know there are people in your organization that are maybe a little more spreadsheet oriented, a little more left brain. Show me how this affects the bottom line. If affects the bottom line like this. If we keep them, profits increase double digit annually and that compounds over time.

Roger Dooley: Okay, well and Joey let's assume that all of our listeners are now convinced that devoting resources to reducing customer churn is going to be a boost for their profits. Where does one start doing this?

Joey Coleman: Couple of things. Number one, I think it's important to acknowledge that your customer has the potential to go through eight phases in the customer journey as they navigate from the first time they become aware of you up

## Never Lose a Customer Again with Joey Coleman

until that point where they're the raving fan referring new business to you. The typical business is paying attention to about three or four of these. Paying attention to all eight alone will dramatically increase your retention. The first goal is to know what these phases are. The second goal is to map out what you're doing in each of these phases. To be completely candid Roger, the thing I love best about this system, once you have the map of what you're currently doing, it is glaringly obvious where you need to focus your attention to improve.

Joey Coleman: Some people will say to me, "Joey I don't really consider myself creative," or "How am I supposed to come up with these ideas?" Even just having an interaction, even if it's not the best interaction, during this phase in the customer journey will dramatically improve the overall customer experience. With your permission let me quickly outline what the eight phases are because I think once you have a context for that it's a lot easier to see where the journey goes.

Roger Dooley: Absolutely and coincidentally they all begin with A too.

Joey Coleman: They do.

Roger Dooley: Yes, it's remarkable. Go ahead, what are they Joey?

Joey Coleman: Yes, so there are eight phases, they all begin with A. The goal being that if you're doing something affective in each of the phases your customers are going to give you straight A's on your report card of what their experience of you is. Phase number one is assess. This is the part of the relationship where the customer is a prospect, they're considering whether or not they want to do business with you. In common parlance we think of this as the marketing and sales function. This can be a day, it can be

## Never Lose a Customer Again with Joey Coleman

a week, it can be a year, it kind of doesn't matter because in my first 100 day schema the clock hasn't started counting.

Joey Coleman: Then we move to phase two, admit. This is the first day of the 100 days model. This is where the customer acknowledges that they have a problem and believe you can help. They transition from being a prospect to a customer. This is often where they sign on the dotted line or they hand over some money and the relationship officially begins. We then move to phase three, affirm. For all the psychology and brain science folks listening in, this is in common parlance buyers remorse, where we know from brain research that the dopamine that was released when they made the purchase starts to recede and those feelings of joy, euphoria, and excitement that they previously had are replaced by feelings of fear, doubt, and uncertainty. They doubt the decision they just made. This is the first window in the journey where most businesses completely miss the mark because they're not doing anything.

Joey Coleman: If I were to ask your listeners to raise their hand, how many have you heard of buyers remorse? Almost every single hand would come up. Now if I were to ask how many of you have a process in your organization to address this thing that you know is happening and you know is happening to every customer you deal with, less than 1% of the hands would go up.

Roger Dooley: I think there's a feeling Joey that maybe ... I understand buyers remorse if I buy a new car and then immediately the next day I'm thinking, "Oh gee, there were better deals out there and there's this other new model coming out. I did the wrong thing." Sign a phone contract or

## Never Lose a Customer Again with Joey Coleman

whatever, but I think in a business context we don't acknowledge the emotion involved. We think that, "Well that customer made a wise decision in choosing our product or service and we know that we can help them accomplish their goal. This is going to be great." We don't acknowledge that that customer is just as emotional as we are when we buy something.

Joey Coleman: Absolutely, you know one of the things I talked about in the very first chapter of the book is this belief that we have B to C and B to B and B to G, and all these different acronym type business relationships is really hurting our business world. What we need to recognize is it's all H to H. Even though it might not feel like the person we're dealing with inside the organization has a heart or cares emotionally, what all the research shows us is they're still a human being so they're having these feelings and we need to meet them where we're at. I think one of the big disservices to modern business over the last 40 years has been this move away from personal and emotional connection. "Oh, well that's personal, that should be kept for your private life. This is business." That's fine in paper and that concept makes logical sense except for the fact that it fails to acknowledge that human beings are involved in the interaction. There's where it all falls apart.

Joey Coleman: When we start to recognize that our customers are breathing, thinking, feeling human beings we're much better served in being able to acknowledge that yes, they're going to feel buyers remorse, regardless of the ticket item. Where it shows up in the business setting Roger is that the buyers remorse is often less about how they feel about the purchase and more about the fear of the consequence of the purchase. What I mean by that is if you're a purchasing agent or you work in a large

## Never Lose a Customer Again with Joey Coleman

organization and you agree to sign up for a new service or a provider or hire a consultant, your fear is a lot less around well what if they don't do what they promise they do? Your fear is what if this project goes south on me and my boss fires me as a result? That's the fear they escalate to. We don't address that in a business setting nearly as much as we should.

Joey Coleman: The desire for self-preservation, not only in life but within a business context, is very high. The consequence that they're weighing this decision against is much higher than what the business presumes, which is oh well the software implementation didn't go well so you lost time and money. They're worried about losing time and money, don't get me wrong.

Roger Dooley: Right, but that lost time and money has a personal impact for them.

Joey Coleman: Yes exactly.

Roger Dooley: They don't get the promotion.

Joey Coleman: On their job and on their performance and on their bonuses and that type of thing. Exactly, so that's where we're dealing with the emotions.

Roger Dooley: Let's pause here for a second Joey. What kind of process can a business put in place to address this buyers remorse issue? Once they say okay, even my B to B buyers are going to experience this very human emotion how do you deal with that?

Joey Coleman: Well there's a couple ways. Let's talk about it in a B to B slash H to H context right, because they're humans. Even just letting them know how excited you are about the

## Never Lose a Customer Again with Joey Coleman

project and putting that in a format, we'll go back to our conversation we were having about the written word. It is shocking the impact that a hand written thank you note can have this early in the relationship. They've signed the contract, they've become a client. Send them a hand written thank you note saying we are so excited to be working with you. Even better, send them a video where you introduce them to the rest of the team. They probably only met the salesperson, they haven't met the other people on the team who are going to be supporting their account. Send a video showing them celebrating and how excited you are.

Joey Coleman: One of the examples I use in the book is a networking group out of Washington, D.C. called Cadre that actually does a welcome call with their new customers. Now a lot of businesses do a welcome call, but what's cool about Cadre, their welcome call comes from another member of the organization, someone who is similarly situated as this new member joining the group. They call and they give them an honest breakdown of what the pros and the cons of the membership are, how it's going to work, etc. That way when this new person walks in to one of their monthly meetings they already know someone in the room.

Joey Coleman: These are highly successful entrepreneurs, but again we get back to that human condition. You're more excited to walk into a room of a club or a new membership you've joined when you know one or two people in the room than to walk in cold. None of this is rocket science, they're just basic things we can do in that affirm stage where we're reminding the customer no, the decision you made is good, it is vetted by other people who made a similar decision, oh and by the way we are super excited about

## Never Lose a Customer Again with Joey Coleman

the project. You may be feeling a little less excited because you're doubting what you just did, but we're actually going to help counter your negative feelings by showing you how excited we are about the project, while also acknowledging that you may be having some doubts.

Roger Dooley: Moving on to the acclimate and accomplish phases, before you brought up software as a service, which I'm sure that all of our listeners use some kind of SAS product and probably many of them, but at the same time as you note, there's a big drop off in app use, in SAS use because I think of problems in those two phases where onboarding that customer in a smooth manner that they can do it easily, they know what they're doing, they can do it comfortably, they get the support and so on is really a challenge. Some vendors make it really easy, they hold your hand at every step, the interface, even if it's an automated interface or it's a web map or a phone app, mobile app, they have very clear procedures and the interface anticipates the question and uncertainties that you might have and deals with those so that you don't have to end up researching it or calling somebody up. Am I right that these two phases kind of blend together and what's a good example do you think of how this should work?

Joey Coleman: They absolutely blend together. Phase four is activate, this is where we enter the relation-

Roger Dooley: Oh I'm sorry, we missed one of them sorry.

Joey Coleman: Yes no worries, no worries. I just want to make sure for the ... We created an open loop for the people that are thinking, "Wait there's eight phases and we only talked about three." Phase four is activate. This is when the relationship officially kicks off, so this can be when they



## Never Lose a Customer Again with Joey Coleman

receive your product in the mail, when you have a kickoff meeting, when they actually start using your software in a SAS type environment. We want to energize the relationship and let them know that this is going to be unlike any other business relationship they've ever had before.

Joey Coleman: Then we move to phase five, acclimate. This is where most businesses fall off the rails. In the acclimate stage you have to help your customer get familiar with your way of doing business. You've delivered your product or service hundreds, thousands, even millions of times, but for this new customer this is the first time they've ever dealt with you, and this is where a lot of SAS companies have issues. Many times the person signing up for a SAS product is not particularly tech savvy, and the main problem is they're comparing you to Apple and Netflix and Amazon, technologies that they use everyday that put a premium on the interface and how easy it is to use.

Joey Coleman: One of the main reasons why app usage and SAS usage falls off so quickly is because the people aren't properly onboarded. We send them a video and we say, "Oh well certainly they've just signed up for our program, clearly they're going to watch the videos, clearly they're going to enter all their data into our software," which is probably data that is sitting in a different type of software that they have to migrate over. "Clearly they're going to change their behaviors that they've been doing for the last month, year, years, their entire professional life and start using our tool." It's foolish to expect that, so we have to hold their hand. If I was running a software company I would focus intently not only on the first 100 days but on the first 30 days to get their usage and their adoption really solidified. Once they start using the tool then they can

## Never Lose a Customer Again with Joey Coleman

actually experience the benefits of the tool, and that makes your service or your product a lot stickier, they're going to want to use it more.

Joey Coleman: Take it out of the context of software, how many people have an article of clothing hanging in their closet that still has the tags on it? That would be most people. If I was selling clothing I would try to incentivize people to wear their new outfit at least once in the first two weeks and to send me a photo. Because if I get you to wear that new shirt or the new pair of pants or the new pair of shoes early on, you're going to break them in, you're going to start to use it, it's going to become part of your wardrobe rotation. Instead of finding yourself in a scenario where three years later you're looking in your closet and you're going, "I never even took the tags off that shirt let alone wore it." It's all about holding your hand, and acclimate again applies to every business on the planet.

Joey Coleman: That's kind of where we are in this stage of what we can do to acclimate and there are all sorts of things we can do. Again, this becomes very specific to your business, but the main thing you want to do is make sure that at all times the customer knows what they're supposed to be doing right now, why they're supposed to be doing it, and what will happen next. Now a lot of people Roger come back to me and they say, "Well Joey, that was in the proposal, we talked about that." Folks, they didn't read your proposal. They just didn't, they're humans. For those of you saying, "I read every proposal." Really? The last time you rented a car and you clicked I agree, I agree, I agree on the 78 screens that they showed you while you were standing at the car rental place with a line of people behind you and you just wanted your car you read everything?

## Never Lose a Customer Again with Joey Coleman

Roger Dooley: Well sure, I read those and I read the software agreements too.

Joey Coleman: Right the software agreements where our goal now is scroll to the ... They've changed it that it forces us to scroll to the bottom, which is by the way their lawyers saying, "Then we at least have some proof that they did a scroll," but if you look at the time spent on that scroll usually they'll drag that immediately to the bottom, hit the box that said yes, and agree. They've read nothing, so we need to be holding their hand and letting them know here's what we're doing right now, here's why we're doing it, here's what comes next.

Roger Dooley: Yes, I like your example from Acceleration Partners which will be more of a professional service firm and when they're getting new people on board, new customers they send out a friendly letter or email that identifies different team members that can resolve different kinds of problems. It gives that new customer immediate access to the right people so they don't have to call in and start dealing with matered attendance and whatnot to figure out okay, well I've got a problem with the billing on this who do I go to or technical issue. It's all there and then that comes from the VP of client services who also assures the customer that she too is available should they need help. To me that immediately takes what could be a more fearful situation than, "Oh gee, I'm going to have to figure out who to deal with there," and says, "Okay, well I've got a whole team here standing by to help me.

Joey Coleman: Indeed. It also shows that the organization and Acceleration Partners does a great job with this, is anticipating where you're going to have problems. By the way, we're working together for the first time. Here are a

## Never Lose a Customer Again with Joey Coleman

couple of places where the wheels can fall off early on in the relationship, and if they do here's the person you call. Not only does it have the name of the person and their cell phone and their email address, but there's a pdf attached as well that has a bio on that person. Not just their professional accomplishments like here's why they're qualified to do the job, but things about them personally. It's designed for someone reading it to be able to find points of commonality or points of reference within the bio and the life experience of the new person they're going to be working with at the organization that they can relate to.

Joey Coleman: It's something again, sometimes when people hear this they're like, "Joey, that sounds so simple. A pdf of who our team is? If they went to the website they can see the about us page where we have profiles of our team." When does a customer go to the website? Before they're a customer. Once they become a customer the only reason they're probably going to your website is if they can't find the phone number of how to call you. That's probably the only reason they will ever go on your website again. This comes back to that hold their hand, make sure they have all the tools they need to communicate with and actually introduce them to the other people on the team who can help them very early in the relationship, and then continue to reinforce that as the relationship develops.

Roger Dooley: We're talking about these sort of friendly communications and humanizing, of course a lot of communications Joey these days are digital in nature, somebody's using an app, they're on a website and they're seeing maybe notifications based on what they did or they're seeing text on the screen, maybe getting occasional texts or some other kind of messaging going on. I think it's still possible to keep this friendly, I know I've seen some businesses

## Never Lose a Customer Again with Joey Coleman

that do a good job of that where the tone of these communications is very informal, it's friendly, kind of fun and playful, and others where it's very businesslike. It's not necessarily bad, it's just sort of transactional and businesslike.

Roger Dooley: To me it seems like the company that does this in a friendly manner makes themselves much more likable, particularly if it's an error message of some kind. I'm sure you've been on a website where you're getting to know the company and you click on something and suddenly a big red error message that oh you did it wrong. Immediately I know my adrenaline spikes, "Oh my God, I did it wrong." Others will communicate that in a much less threatening way. We can't do what you're asking but here, we'll help you do what you want to do. I'm curious if you've seen some examples of that and who's doing a good job of that.

Joey Coleman: Indeed, I think one of the key points that you make and you're spot on with your assessment is it's letting your brand voice come through and letting some humanity come through. Here's the thing, we've operated for the last couple of decades with this idea of oh well what customers want is a professional experience, they want it clean, they want it businesslike, and buttoned up. Yet we've also witnessed that in our office spaces most people don't come to work in suits and ties anymore. People have become more casual. The line between your business life and your personal life has blurred to the point where, for a lot of folks, there's no difference between the two other than what time of day you're plugged in focusing on one aspect versus the other.

## Never Lose a Customer Again with Joey Coleman

Joey Coleman: One company that we profile in the book that does an incredible job of letting their brand spirit come through is a company called Zogics. Zogics sells gym wipes, the type of disposable wipe you would use to wipe the sweat off a piece of workout equipment in a gym or spa. Not very sexy stuff right? Very utilitarian-

Roger Dooley: Pretty specialized.

Joey Coleman: Yes pretty utilitarian product, not very specialized, not something that people wake up in the morning and say, "I wish I had more gym wipes." But an important piece of the puzzle when it comes to creating the experience. Zogics does a dozen different things that allow their brand voice to come out. One of my favorites of which is the box that their products ship in has this fantastic message on the front that says you're awesome. Then it goes on and I'm quoting here, "This box has special properties. Some might even say it's a magical box. It transports the world's best wipes straight to your door. These wipes make equipment shine, ick vanish, and smiles appear. See, you're already smiling. This box can also be used as a rocket ship, in the construction of a super secret fort, or as a condo for small dogs, oh okay, cats too. Use your imagination, we don't judge. Whatever you use this box for just know it was sent to you with love from Zogics."

Roger Dooley: It's great.

Joey Coleman: Now some people might say that doesn't work for my brand Joey, we're accountants. That would be ridiculous.

Roger Dooley: Yes Accenture might not do that.

Joey Coleman: Total, but if Accenture did do this, if Accenture let more of their personality come out in the communications I think

## Never Lose a Customer Again with Joey Coleman

people would feel more excited about their interactions with Accenture. That's not a criticism of Accenture. I know some fantastic folks that work there, but every brand can live its brand spirit more and let its peoples spirit come out more. They also include a lollipop with the shipment and some people are like, "What does a lollipop have to do with a gym wipe?" Absolutely nothing, and that's the point. A lollipop has to do with a human being, and the fact that somebody's expecting wipes for their gym and they open up this box and they get an organic, super healthy, locally made lollipop that comes from one of the other businesses in the small town in western Massachusetts where Zogics is based, it allows them to promote another business while giving a small little moment of surprise and delight that doesn't cost them anything. It's all about letting your spirit come through in these communications.

Roger Dooley: I think that's a great example and I've seen many businesses, not many, not enough probably, but who just take that moment to tell their customers, "Hey you're great, we like you." I think that's so important because often dealing with these things is a potentially stressful situation. If you're navigating a website for the first time using an app or whatever, those affirmations are great. Let me jump ahead a little bit in the scheme of things. I don't think we're going to get to all eight. People might actually have to buy the book Joey, you never know. You mentioned events more than once in the book. How can events help build loyalty?

Joey Coleman: The secret I think when it comes to events is you have this incredible opportunity to have people in front of you. In this day in age most businesses would die to have in-person interactions with their customers, and events are



## Never Lose a Customer Again with Joey Coleman

uniquely positioned that that's the nature of the beast. I think we want to capitalize in the in-person nature to build community, to foster experience, and create a level of excitement that wants them to come back for the next event.

Joey Coleman: One of the events that I absolutely love and we profile in the book is an event called Mastermind Talks. It's run by a Canadian entrepreneur named Jason Gagnard, and Jason runs a three-day event for 150 people and the price tag is \$10,000. It is not an inexpensive event. He has a waiting list of thousands of people trying to get in. The other crazy thing about Jason's event is each year only 50% of the previous years attendees can come back. He's needing to fill new seats and foster within this larger community. The way he does that is he pays very close attention to the personal and emotional connections he's creating with his customers. He researches them implicitly. He pays attention to a lot of the small details like who are you seated next to? Not only in the meetings but also with the dinners. Pairing people up with people that he knows will connect and it's kind of created this environment where part of the game is to try to figure out why you're seated next to someone.

Joey Coleman: At his event, I've had the pleasure of attending every year. At his event a few years ago I was seated next to a guy and we started talking about our businesses and we couldn't figure out what the connection was until the guy mentioned, in a casual aside, that he had been to Antarctica several times. Now Antarctica has been on my bucket list of a place I wanted to go since I heard about the continent of Antarctica in grade school. I was like, "This would be amazing," and I haven't had the chance to go yet. We're going to get there. I've done six out of

## Never Lose a Customer Again with Joey Coleman

seven continents, this is the last one, but now I have a point of commonality. This person we haven't talked to each other in about a year and he messaged me a few weeks ago, it was my birthday, just with a birthday message on Facebook, and he said in passing, "Have you been to Antarctica yet?"

Joey Coleman: Now the crazy thing about that is here's someone that we had a passing reference, but Jason took the care to pair two of his customers together so that they would create a deeper level of connection. I think the big takeaway for events is don't just worry about who's on the stage, don't just worry about whether the food is tasty and you have the gluten free, vegan, keto friendly diet for those audience members that are in attendance, but think about the connections that you're making that can be fostered after your event.

Roger Dooley: That's a really high touch organization level that probably every business can't do, but I think that even inviting people to something that offers a modicum of exclusivity can help. I know years ago we bought our first Lexus back in Indiana, and at the time the customer experience there was awesome compared to other car dealers where now I think in the intervene years car dealers have gotten a lot better, even the less elite brands, but at the time it was a totally different thing where the dealership was more like being in a living room rather than being in a tile floor, fluorescent lit space with some plastic chairs and so on.

Roger Dooley: One of the things they did was periodically for their owners, and presumably some potential owners, they had a invitation only reception. There might be some little entertainment but they'll be some hour devours and drinks

## Never Lose a Customer Again with Joey Coleman

and so on. It made you feel like you were part of this sort of unique little family. To me that was really brilliant. Cost them something, but probably on a per customer basis not that much but it certainly made you feel like you were part of a group. Not a tribe exactly but-

Joey Coleman: But a tribe, that's exactly the word I was thinking Roger. That's what you did, it was the tribe of Lexus owners. Here's the thing, if we look at the history of humanity we used to be very tribal. You knew the people in your community. Now we live in an age where with your cell phone or with the internet you can connect with people on the other side of the world. In some ways we are more connected than any other time in human history. Yet the reality is people feel disconnected, they feel less connected to the world. They're connected through their technology but they have less personal and emotional connections to their friends and their family and their colleagues.

Joey Coleman: What this dealership was doing was helping to foster connection, which interestingly enough, briefly if I may, brings us back to the phases. After you acclimate you go to phase six where you help them accomplish their goal where they get the thing that they originally wanted when they decided to do business with you, and if you deliver on that you can take them to phase seven, adopt. Where the customer becomes loyal to you and your brand and they feel like you're part of the tribe. In this scenario you bought the Lexus, you were then invited to the owners reception where you would be with other Lexus owners and say like you're part of the community, you're one of us. That's how you get them to phase eight, the final phase, advocate where they become a huge fan, raving fan referring their friends and colleagues.

## Never Lose a Customer Again with Joey Coleman

Joey Coleman: The problem is most businesses want to jump from that admit phase way at the beginning when someone first becomes a customer, to the advocate phase where we're asking them for referrals. It's way to fast. It's like asking to meet the parents on the first date before they've actually brought your entrees to the dinner table. Yet most businesses do that, and we talked about software businesses, they're particularly bad at this. You've probably had the experience, I know I have, where you log on and you sign up for a new software or something, and then you get to the order and you process the order and you're in the cart, and the next thing that pops up is a screen that says you probably know other people that could benefit from our product or service as well, please enter their emails. I don't know about you, I've never done that, and I never will because I haven't used the product. How am I supposed to refer you when I have no context other than yes, based on your sales and marketing materials it seems like I'm going to give it a try?

Roger Dooley: Yes, please spam your friends for us, we need your help. Joey I want to be respectful of your time here. Let me remind our listeners that we're speaking with Joey Coleman, founder of Design Symphony and author of the new book Never Lose a Customer Again. Joey, how can people find you and your ideas online?

Joey Coleman: The best place to find me is on my website, which is joeycoleman.com, that's J-O-E-Y like a five year old you know somewhere, Coleman C-O-L-E-M-A-N like the camping equipment, joeycoleman.com. The book is called Never Lose a Customer Again. You can get more information about it on my website. There's videos, there's stories, all kinds of free tools for you to implement these type of customer experience enhancements in your

## Never Lose a Customer Again with Joey Coleman

business. The book is available, not only as a hardcover book, but an ebook and an audio book. I want to say to all the podcast listeners, if you've enjoyed listening to my voice as I tell you these stories, there's an audio book and you can have me narrate the whole thing to you. I was very excited to be the narrator. Definitely would love you to check out the book, and since we talked about how do we address those buyers remorse feelings, here's the buyers remorse offer for you, and it's why I put it in the first chapter of the book. If you buy the book and you don't like it you send me an email and I refund your money no questions asked, period.

Joey Coleman: My goal is that by the time you actually, if you read the book, you will have dozens and dozens of ideas. We talked about a bunch of case studies, there are 46 case studies in the book of companies that are world class that range from companies doing less than a million dollars in revenue with one or two employees, to companies with hundreds of thousands of employees doing more than \$50 million a year in revenue, and some are doing billions and billions of dollars in revenue. There's really something for everyone in the book.

Roger Dooley: Awesome, well we link there to the book at Amazon and to any other resources we talked about on the show notes page at [rogerdooley.com/podcast](http://rogerdooley.com/podcast). We'll have a text version of our conversation there too. Joey I can definitely confirm that there are a lot of great examples in the book and a lot of good advice. Thanks so much for being on the show.

Joey Coleman: It was a pleasure being here. Thanks Roger.

## **Never Lose a Customer Again with Joey Coleman**

Thank you for joining me for this episode of The Brainfluence Podcast. To continue the discussion and to find your own path to brainy success, please visit us at [RogerDooley.com](http://RogerDooley.com).