

## **The Strategy of ICE: Increase Referrals through the Incredible Client Experience**

**By Karel Murray, CSP, DREI**

There has been a lot written about the delivery of exceptional customer service in order to enhance receipts of referrals and/or recommendations. It seems as if there must be a simple answer to updating processes and training licensees to ensure that the new quality guidelines are kept. That isn't usually the case. Take for example, a recent conversation with a managing broker in her search to establish a visibly WOW! customer service culture within her real estate brokerage.

Initially, she admitted that real estate companies are essentially the same (in the eyes of the consumer), offering similar services. Her biggest concern was how to create an environment that allows management to establish a tightly knit team of happy employees and licensees who can't wait to deliver a service level that is compelling enough for consumers to think of her firm first; the concept mirroring the movie motto "If you build it, they will come!"

The look of frustration on her face said it all. The objective was so big; she was having trouble deciding where to begin. If that is something you face, take heart. The lofty goal is obtainable when you follow four essential steps that continually move you and your team towards the ultimate culture you desire.

### **Step 1: Gather Information**

Nothing can be accomplished until you know exactly where you stand in terms of service to your staff, your licensees and to the general public. Intuitively knowing where you stand and actually having supportable data to prove your service levels are two different things.

- Start with an internal survey managed by an outside source to ensure that honest feedback and opinions are shared without fear of recrimination from upper management.
- Establish a licensee task force and/or council to review the survey and begin to identify those areas that need work.
- Observe and track performance. You could do this by:
  - Job shadowing each position for a week and gain an understanding of the issues the employee and/or licensee face. The more you connect with the team, more conversation and opinions will surface.

### **Step 2: Assemble, Analyze and Adapt**

All of the information you gather needs to be sifted through and the genuinely actionable items brought to the surface. Once you have everything on the table, you can then begin the prioritization process.

- Set up a plan of action to tackle the feedback. Take the raw data and consider dividing it into categories such as:
  - Best customer/licensee experiences
  - Worst customer/licensee experiences
  - What employees/licensees most appreciate
  - Areas of improvement for management that will increase employee/licensee trust and engagement
- Once you have workable data, develop your own ranking system of priorities.
  - What steps need to take place first?
  - Define the resources that will be needed:
  - Evaluate positions, accountabilities and success planning for all levels of employees/licensees to ensure the right people are in the right jobs and have a potential to thrive.
  - Establish the authority level to solve problems for each position.

### **Step 3      Prioritize and Implement**

Once you have a clear idea of what it takes to make your customers/clients/licensees into advocates of your business, you must prioritize your action steps and implement those actions in logical and impactful way.

- Identify those actions that will have the most impact on the customer experience with the least amount of effort.

### **Step 4:      Evaluate Results and Calibrate Accordingly**

It isn't unusual for an action step or two to go awry. Reasons for this might include: the problem solving step may have been rushed and decisions were made with incomplete information or the implementation of the action step isn't supported by everyone on staff. Multiple reasons could exist that essentially stall a well-intentioned strategy. That is why the evaluation and calibration step is so vital.

- Check your follow up routines and tracking systems. Know exactly where you started and the goal you hope to reach.
- Make the appropriate adjustments in staffing or processing as needed, constantly keeping the focus on the ultimate goal of designing and maintaining an exceptional customer experience culture.

The Strategy of ICE is all about input, collaboration, setting aside egos and making every action consumer centric. Concern about the customer or client always trumps concerns about the money. You know personally, when you are in the hands of an organization that puts you first and foremost. It feels wonderful, safe and makes our decision making process extremely easy and encourages you to make those powerful recommendations. What management chooses to recognize; the number of transactions or the quality of the transaction, is paramount in setting the stage for that incredible customer experience.

The Strategy of ICE: Incredible Client Experience is transformational. You and your organization can transition from a rigid inflexible process focused environment (much like ice) and turn into a fluid, high energy work environment that customers and employees can't wait to engage with. Once you make the commitment to create that incredible customer experience at all levels of your organization, there's no turning the tide back. Enjoy the challenge and thrive.

*Karel Murray, author, humorist and business trainer speaks nationally and internationally. She is the author of three books and featured in four more, The Profitability Blueprint Series: Career Building Concepts for the Real Estate Licensee and numerous articles in local, regional, and national publications. You can contact her at [karel@karel.com](mailto:karel@karel.com) or call 319-239-1464 or access her web site at <http://www.karel.com>*