



Beyond the Sale:

How to Deliver an Experience Clients Never Forget

This workbook is your guide for today's interactive session. We'll reflect on your customer journey, identify opportunities to improve the post-sale experience, and leave with one actionable idea you can implement immediately.

1. Remember a WOW Experience - Think of a time you were truly impressed after purchasing something. This could be a product, service, or experience.

- What happened that made it so memorable? How did it make you feel?

2. Six Communication Channels - Ways to interact with clients through their journey:

- **In Person** – Launch meetings, check-ins
- **Video** – Welcome, milestones, encouragement
- **Email** – Onboarding, updates, education
- **Mail** – Notes, gifts, print materials
- **Phone** – Thank-you, check-ins
- **Presents** – Freebies, surprise perks, recognition

3. The 8 Phases of the Customer Journey

Use this reference list to spark ideas for your own business.

Phase	Definition	Objective
Assess	Prospect evaluates you	Set expectations & curiosity
Admit	Prospect becomes customer	Make them feel great
Affirm	Buyer's remorse may creep in	Reassure them
Activate	First product/service experience	Deliver a WOW moment
Acclimate	They learn how to use it	Build comfort & consistency
Accomplish	They get the result	Celebrate & reinforce success
Adopt	You become part of their routine	Deepen brand connection
Advocate	They refer you to others	Empower promotion & sharing



4. Map Your Customer Experience

Pick 1–4 of the first phases (Assess to Activate) and brainstorm what you’re doing (or could do) to WOW your customers.

Phase	#1 Assess	#2 Admit	#3 Affirm	#4 Activate
<i>What is the Client’s Goal at this Phase?</i>				
<i>What emotional shift do you want to create here?</i>				
<i>What medium would feel most personal?</i>				
<i>What would a “WOW moment” look like here?</i>				

Upcoming Event!

Think Like an Owner: The Leadership Shift That Protects Profit

Date: June 24, 2025

Time: 4:00–6:00 PM

Location: 6th Street Restaurant & Bar



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