

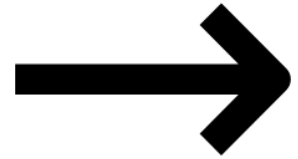
# Elevating Your Client **Experience** Workshop



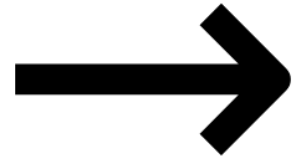
## Workshop Purpose + Outcome

In this Workshop, we will walk through the fundamentals of an awesome client experience, including the Awesome Client Journey, online and off. 2023 is going to be all about creating more value, trust, and care, to both retain current clients and engage future ones. You will leave this Workshop with a deeper focus and clarity on your brand promise, the experiences you create and deliver, and the parts you want to elevate for your clients.

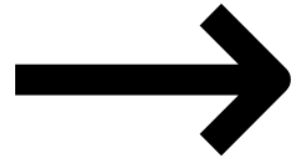
# What You Will **Learn**



**Your Experience Is Your Brand**



**Awesome Client Journey + Experience Offline and Online**



**Elevating Your Client's Experience**



**Next Steps**



**What Outcome Are You Seeking  
From This Workshop?**



# Let's Review the **Marketing Trends** from January's Workshop



# Marketing

**Elevating the experience in small ways, with a big impact**

**Focusing on the fundamentals and what your clients (team, tenants) value in their experience**

**Trust, care, VALUE**

**Relationships, lifetime client (team, tenant) value**

**Solutions, Solutions, Solutions**

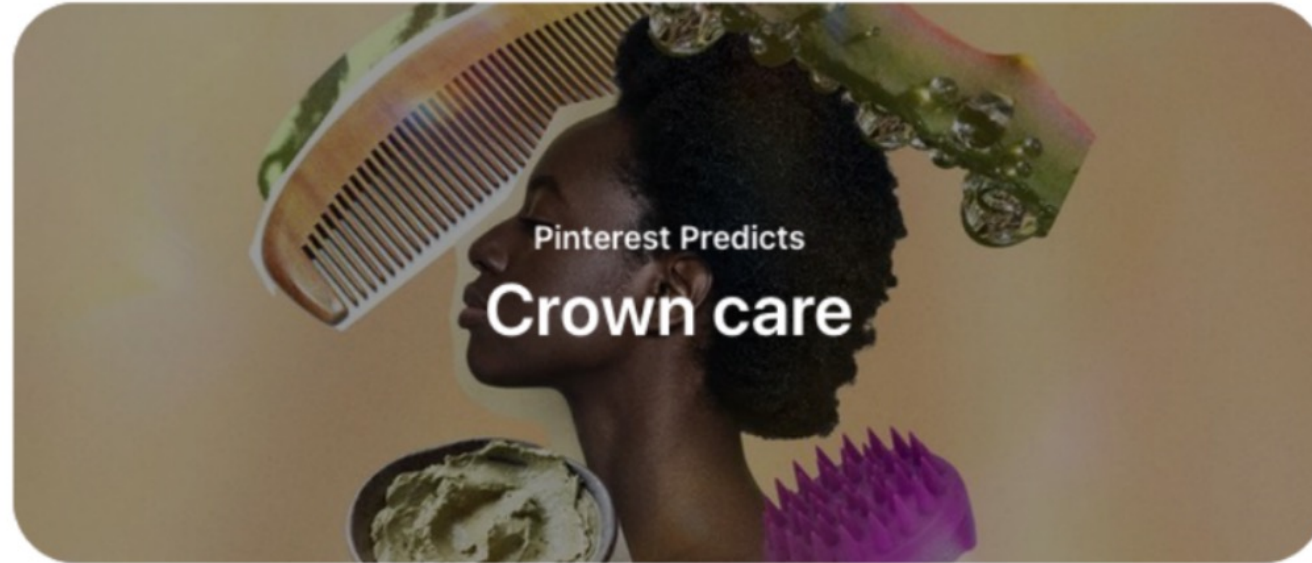
**Your folks need you to help solve their problems**



## Marketing **Solutions**

- ➡ **Caring** can look like tapping into 'lapsed client report' and consistent outreach, focusing on client problems, and introducing new solutions, post-experience follow-up, thank you notes
- ➡ **Trust** can look like clear communication, price transparency, consistency of experience
- ➡ **Value** can look like elevating the client experience based on what they value, focusing on value-added services and products, doing less with more, same-day pick-up or appointments, and maintenance packages

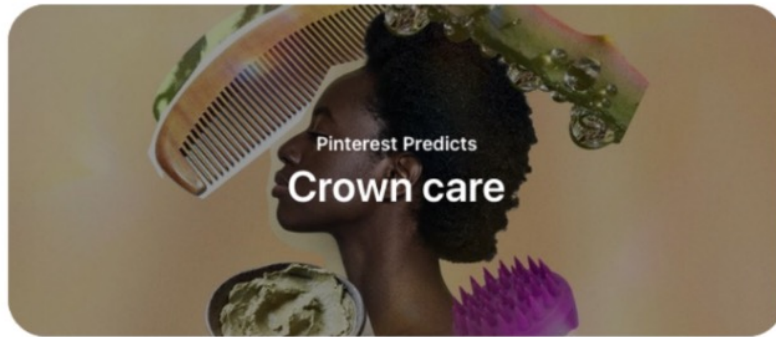
# Beauty



If you want to get a head start on hair care in 2023, go back to your roots. "Skinification," or a focus on the scalp and crown of your hair, will come into focus this year. People are looking for extra care for the scalp, like "scalp treatment" and "clean scalp" ideas. This is your chance at a root revival. Now, who wants a scalp massage?

**Source:** <https://business.pinterest.com/en-us/pinterest-predicts/>

# Beauty



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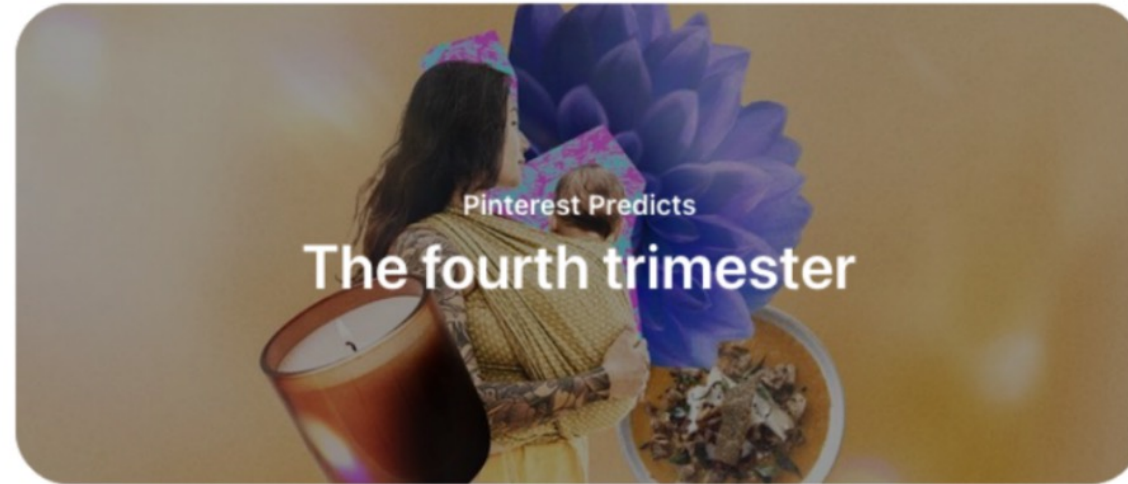
## Optimizing The Trend

**Get serious about scalp care services and solutions**

**Scalp care and hair loss can be related, know your clients problems and create solutions that are aligned with your brand**

**Check your menus and marketing**

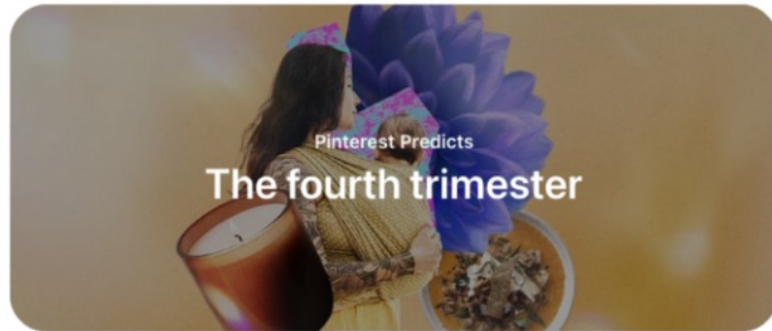
# Lifestyle



People may use social media to post their bump pics prepartum, but they're increasingly coming to Pinterest for their postpartum needs. This year, people are seeking ways to support birthing parents during that famous fourth trimester—searching for everything from postpartum meals to gifts and essentials.

**Source:** <https://business.pinterest.com/en-us/pinterest-predicts/>

# Lifestyle



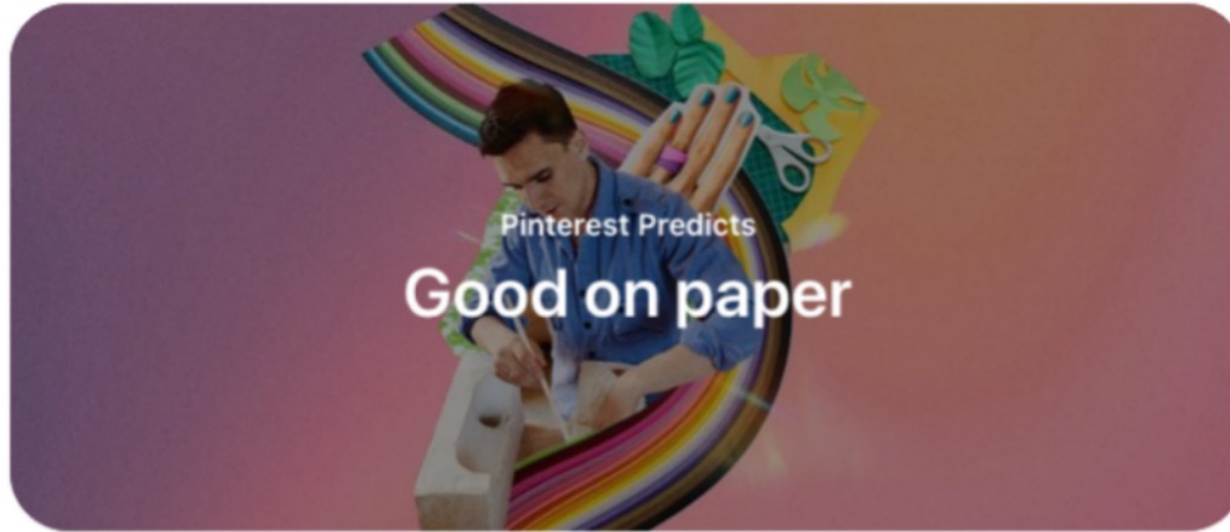
People may use social media to post their bump pics prepartum, but they're increasingly coming to Pinterest for their postpartum needs. This year, people are seeking ways to support birthing parents during that famous fourth trimester—searching for everything from postpartum meals to gifts and essentials.

## Optimizing The Trend

**What are your client's postpartum problems and how can you create solutions for them?**

**Think hair, skin, nails, schedules...**

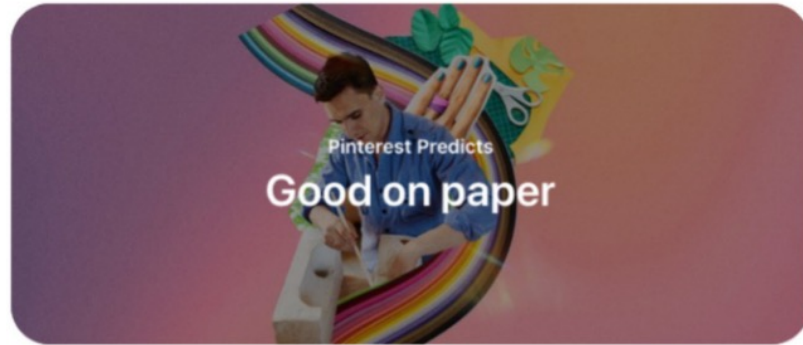
# Lifestyle



Analog hobbies: so in right now. Paper crafts will make a comeback this year as folks turn to quilling, origami and paper art to satisfy their crafty cravings.

**Source:** <https://business.pinterest.com/en-us/pinterest-predicts/>

# Lifestyle



Analog hobbies: so in right now. Paper crafts will make a comeback this year as folks turn to quilling, origami and paper art to satisfy their crafty cravings.

## Optimizing The Trend

**Nostalgia and tech burnout converge**

**Craft nights, handwritten thank you notes**

**Your Experience Is Your Brand**



**Consistency Builds Trust**

**Trust Builds Relationships**

**Relationships Can Lead To Referrals**

**Referrals Can Be Retained When You Deliver Awesome  
Experiences Consistently and Aligned With Your Brand**



# **Lifetime Client Value**

**Lifetime client value is the total amount of value (revenue, referrals, joy!) a client brings your business over the time they spend as a client of yours (retention!). Happy clients create more happy clients which creates long-term business and brand happiness.**

# Your Brand

## Brand Storytelling Framework



brand purpose  
brand promise  
brand people  
brand products  
and services

\*brand  
business model



brand story  
brand vision  
brand values  
brand voice



brand identity



culture  
marketing  
pricing  
products  
services  
content  
programs  
education  
communications...

# Your Brand Purpose

## Brand Story Worksheet

### Brand Purpose

Answer these questions:

1. What problem are you solving?
2. Why does your brand exist?
3. What are your values?
4. What do you believe in?
5. Why would I want to choose your brand?

Tip:

Ask your clients why they chose your brand.

Ask your clients what they love most about the experience you deliver.

Think about WHY you chose to create this brand? Get specific.

Brand purpose is about the client, not about YOU.

# Your Brand Promise

## Brand Story Worksheet

### Brand Promise

Answer these questions:

1. What does your experience look and feel like?
2. How do you solve the problems of your people?
3. What is the expectation you are setting for your experience?
4. How do you want your clients to feel?
5. What do you want your clients to say about your experience?

### Tip:

Ask your clients how they feel when they are engaging with your brand. Ask your clients what they value and care about.

# Your **Brand People**

## **Brand Story** Worksheet

### **Brand People**

Answer these questions:

1. Who are you solving problems for?
2. What do they value and believe?
3. What do they care about?
4. What is their energy and vibe?
5. Where do they hang out?

Tip:

Think about who your dream client is.

Think about what their vibe is.

Think about what visions and values you and your dream client share.

# Your Brand Products and Services

## Brand Story Worksheet

### Brand Product/Service

Answer these questions:

1. How do the products we offer align with our brand and solve the problems of our people?
2. How do the services we offer align with our brand and solve the problems of our people?
3. What other products and services could I offer that better solve the problems of our people?

### Tip:

If you find your products and services are not aligned with your brand, make a plan to create ones that are.

# **Your Experience Is Directly Connected To Your **Brand Promise****

**What do your clients value?**

**What does your experience look and feel like?**

**How do you want your clients to feel?**

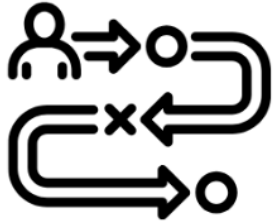
**What do you want your clients to say about your experience?**

**How is your experience aligned with your brand?**

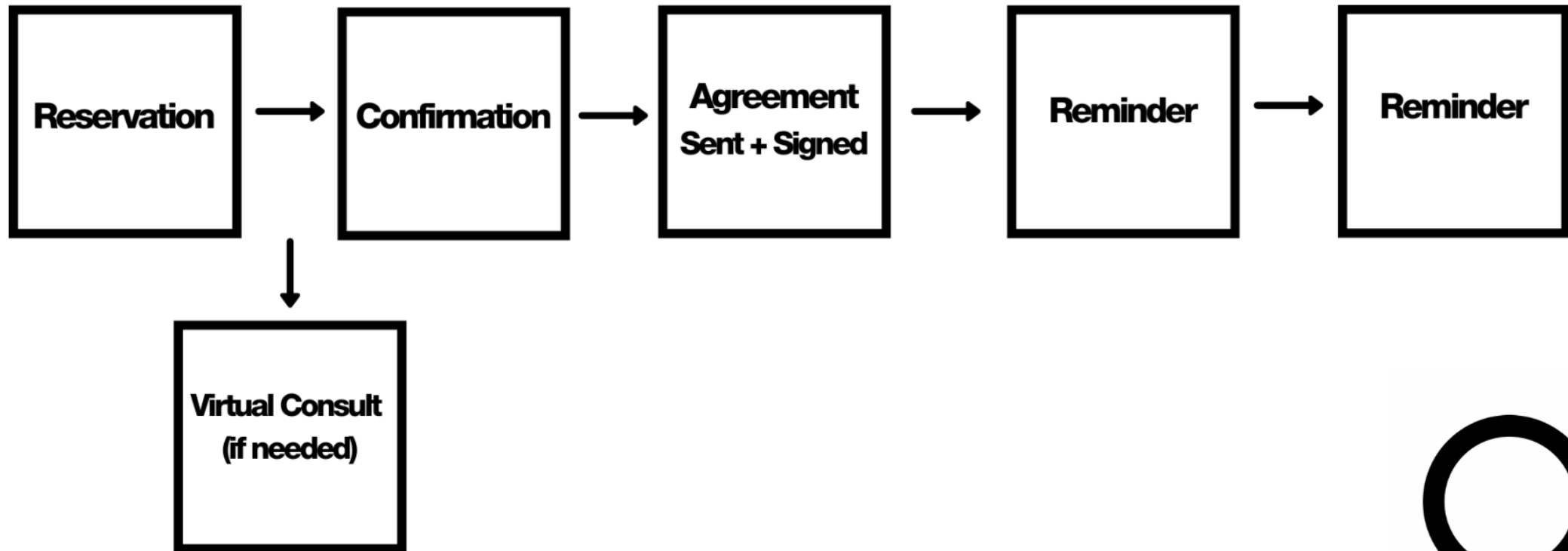


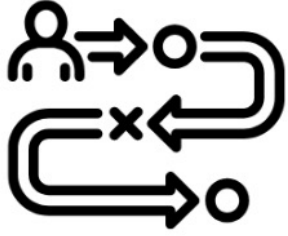
# **Awesome Client Journey & Experience** **Offline and Online**



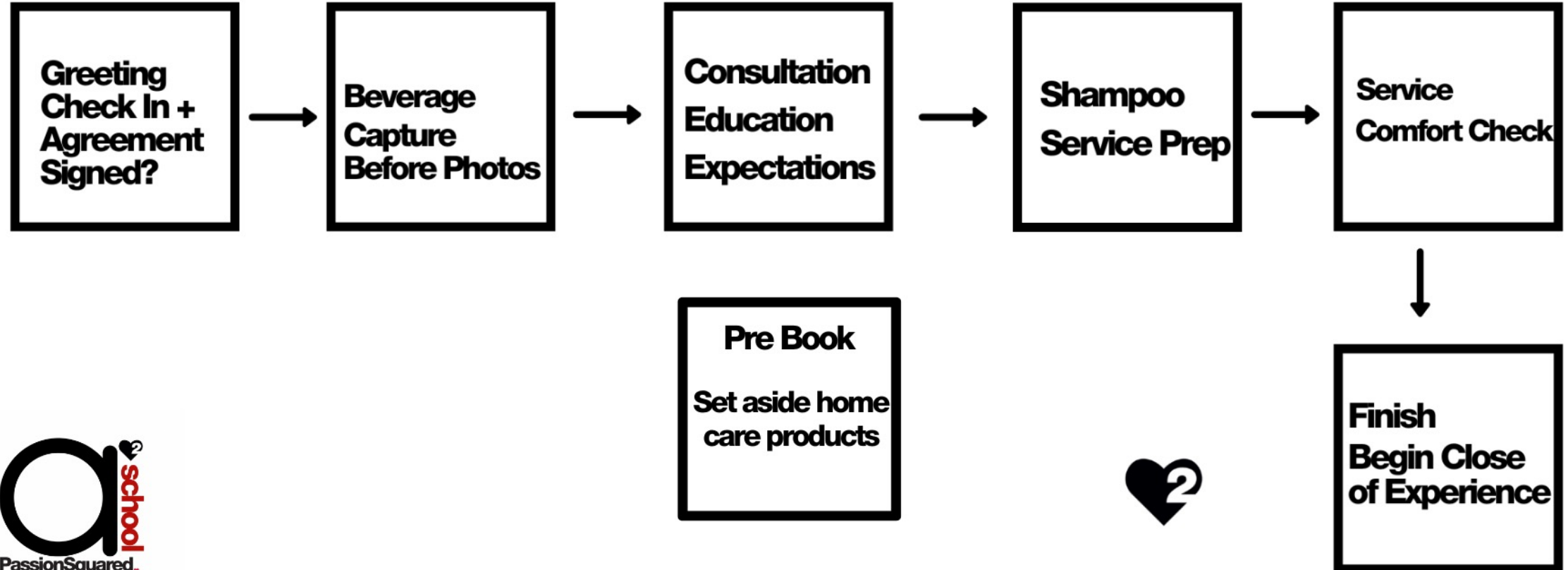


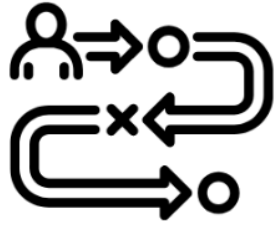
## My Awesome Client Journey: **Pre-Experience**



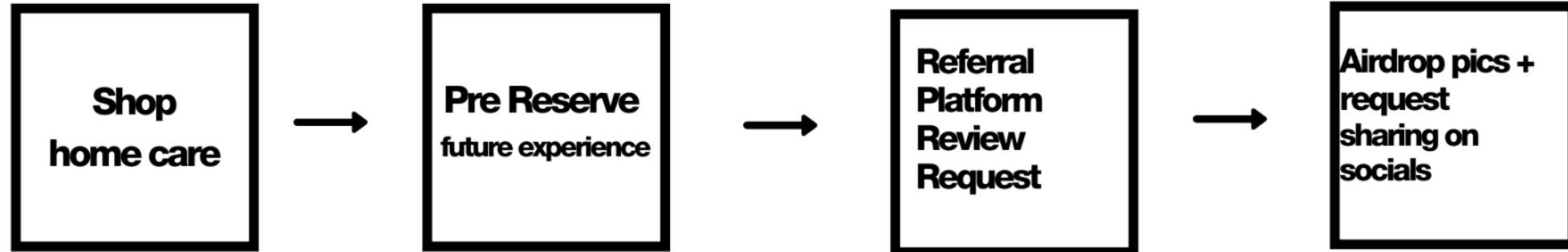


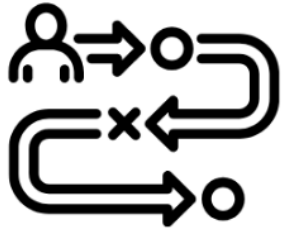
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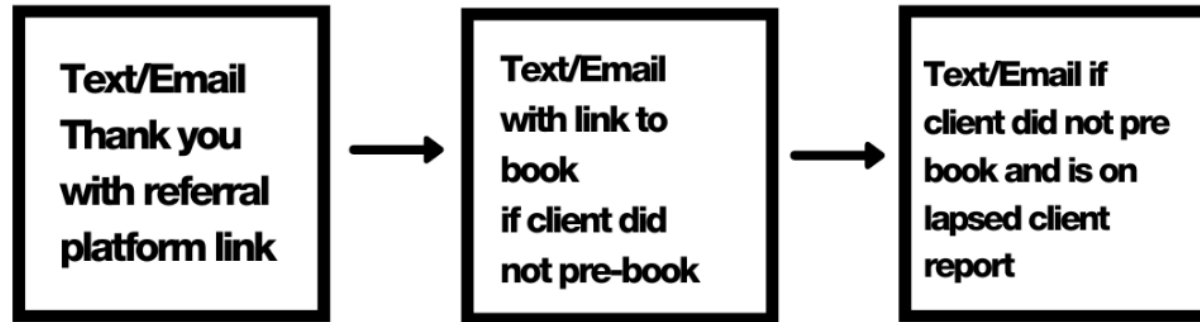


## My Awesome Client Journey: **Experience**



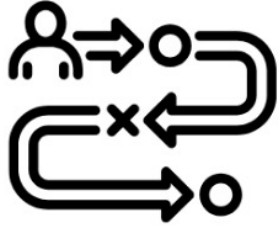


## My Awesome Client Journey: **Post Experience**



### **NOTE:**

Nearly every salon software system and app offer text/email functionality along with reports for lapsed clients. This is not "automated" meaning it does not happen unless you run the report and set up the email/texts.



## **My Awesome Client Journey: Instagram**

**Post about an appointment with CTA link in bio @passionsquared**

**Post about an appointment with CTA Click on Book Button**

**Post about an event with a CTA link in bio @passionsquared**

**For Stories:**

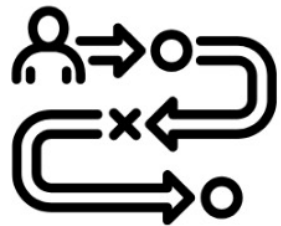
**If you have a CTA, use the Link sticker and customize the link name**

**NOTE:**

**Do not put a web address (URL) in captions as they are not clickable.**

**Always use @page name in caption if there is a CTA**

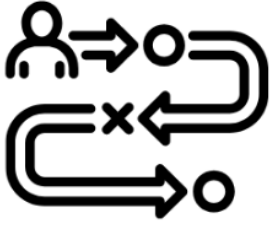




## My Awesome Client Journey: **Instagram**

**Do not put a web address (URL)  
in captions as they are not  
clickable.**





## My Awesome Client Journey: **Instagram**

**Always use @page name in the caption if there is a CTA and be clear with your CTA.**



I'm opening my books 📖 and going to be working more days the coming months!  
Text 📞 the number in my bio and let's start your hair journey!

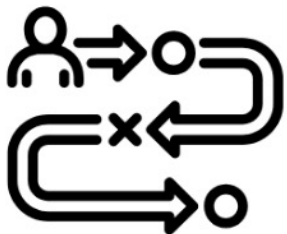
**Phone # in bio is not clickable**

text 949- [REDACTED]

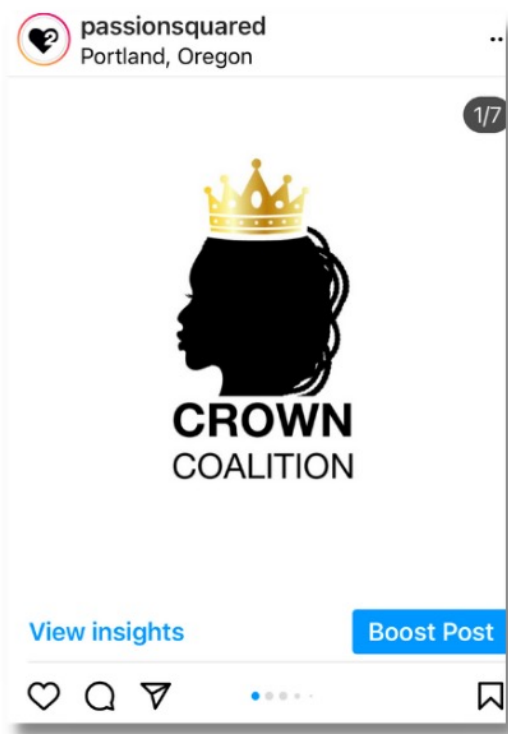
Contact

Text  
(949) [REDACTED]





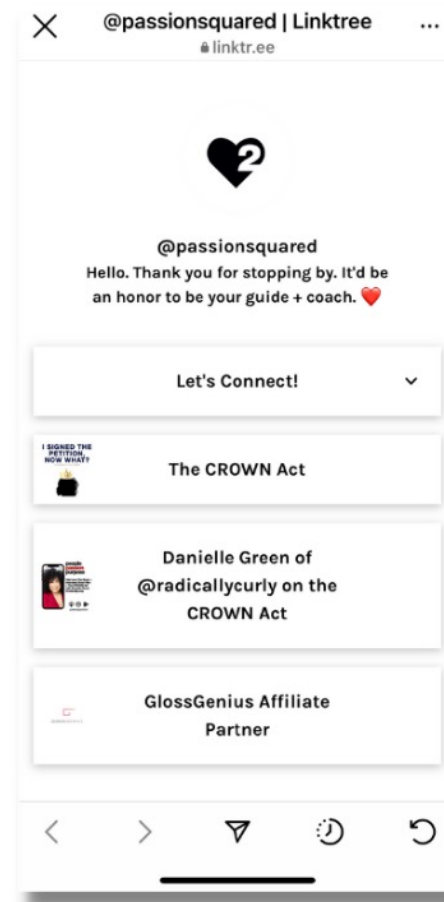
## My Awesome Client Journey: **Instagram**



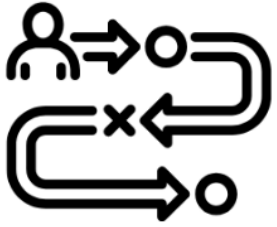
Click on the link in our bio  
[@passionsquared](#) to learn more about the CROWN Act + take action.👑

Click on the link in our bio to listen to an episode on the pod recorded in February 2020 with [@daniellegreen\\_\\_](#) [@radicallycurly](#) as she shares some context that will help you better understand the importance of the CROWN Act.👑

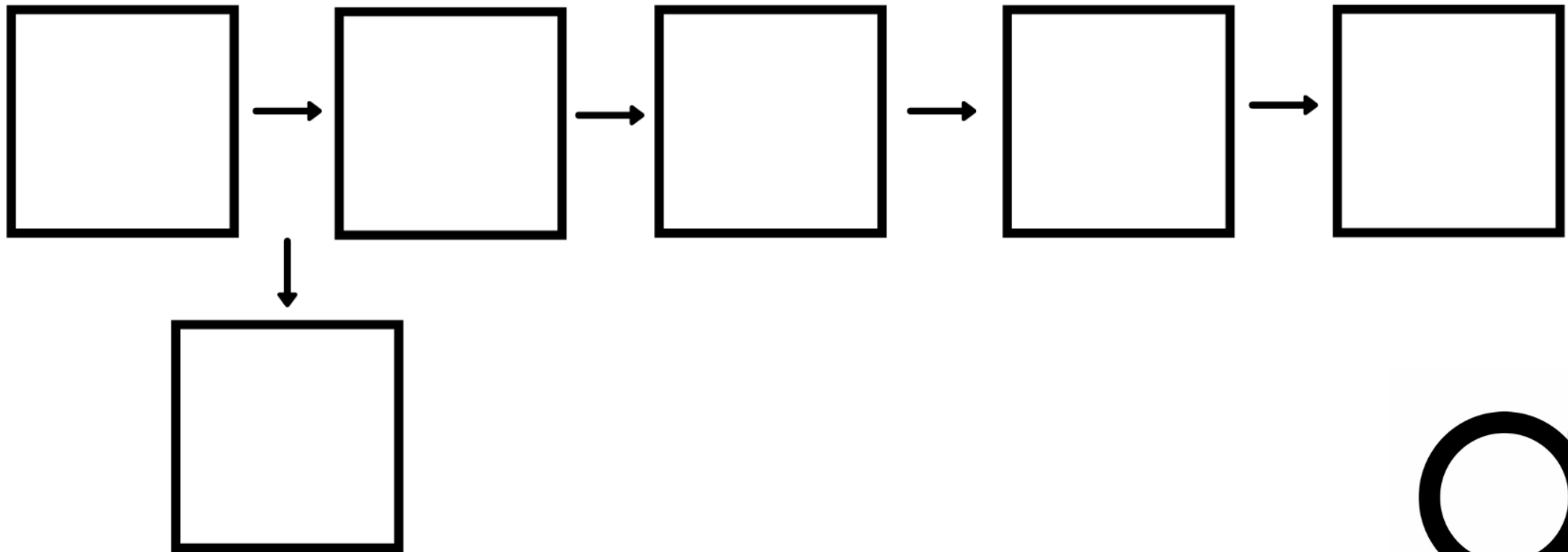
Together, we can put an end to race-based hair discrimination. If not us, who?

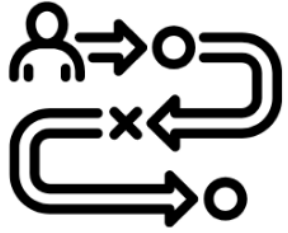




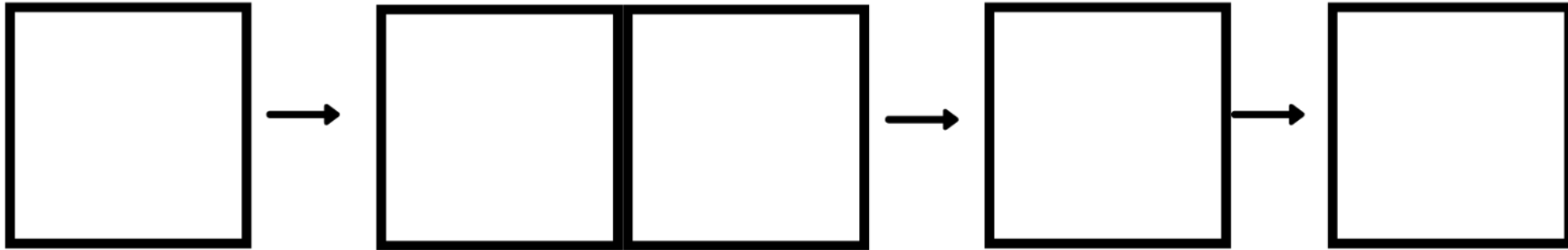


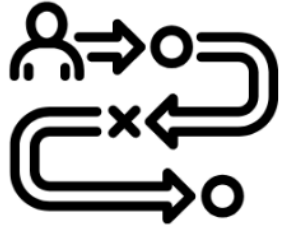
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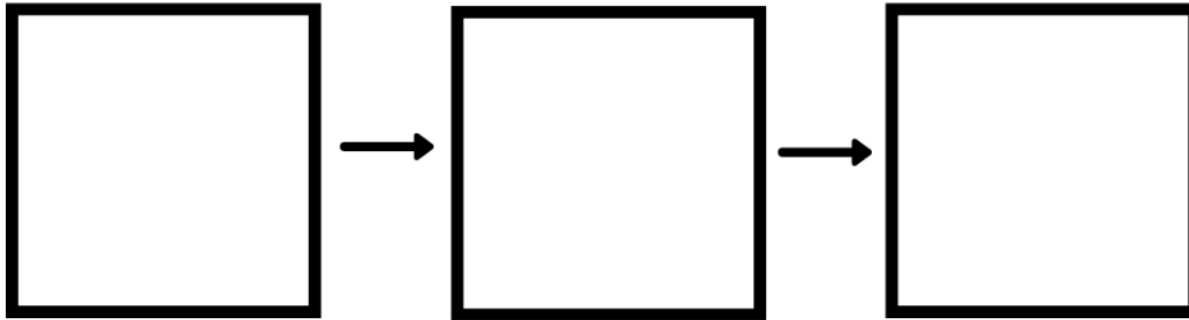


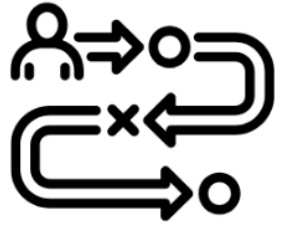
## My Awesome Client Journey: **Experience**





## My Awesome Client Journey: **Post Experience**

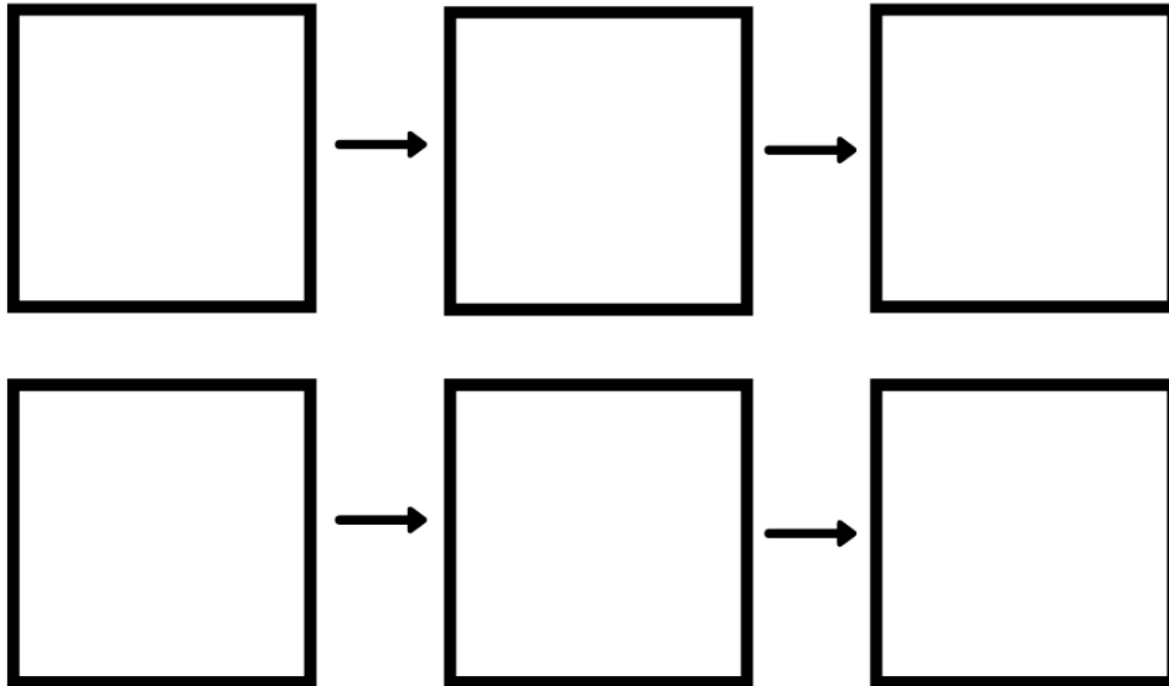




## My Awesome Client Journey Map

Platform: Website

Outcomes + Optimizations



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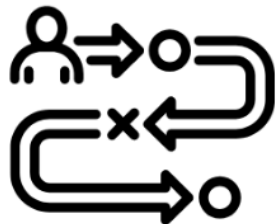
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## My Awesome Client Journey Map

Platform: **Booking**

Outcomes + Optimizations

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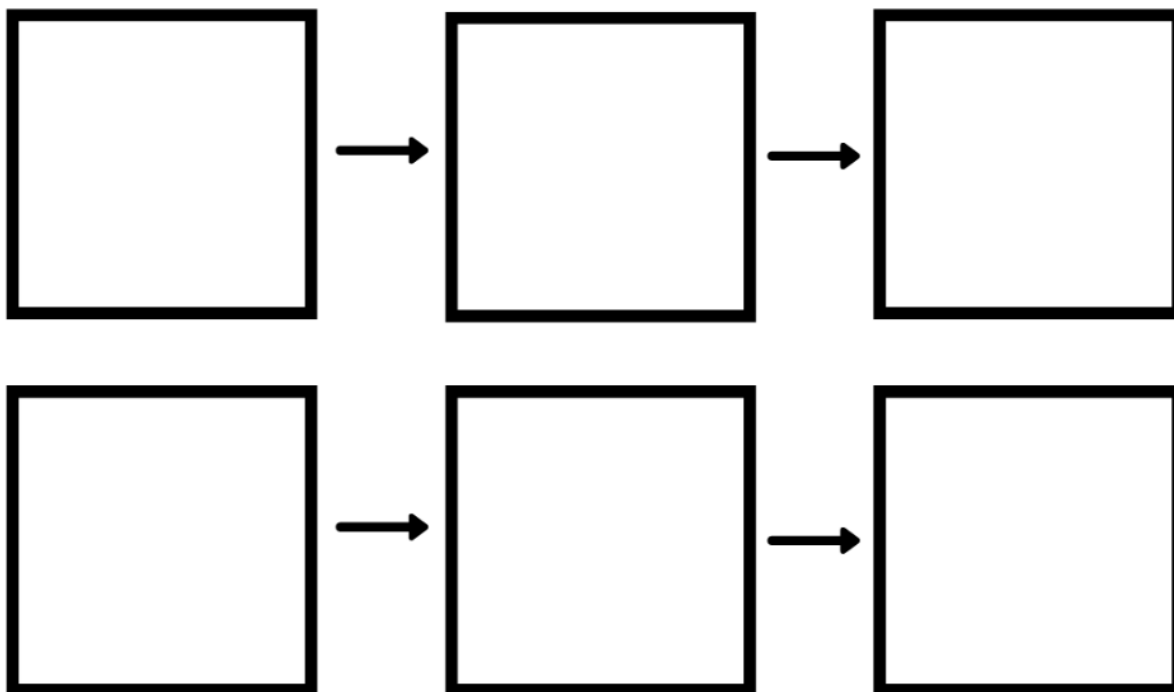
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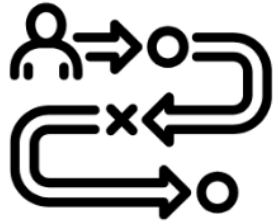
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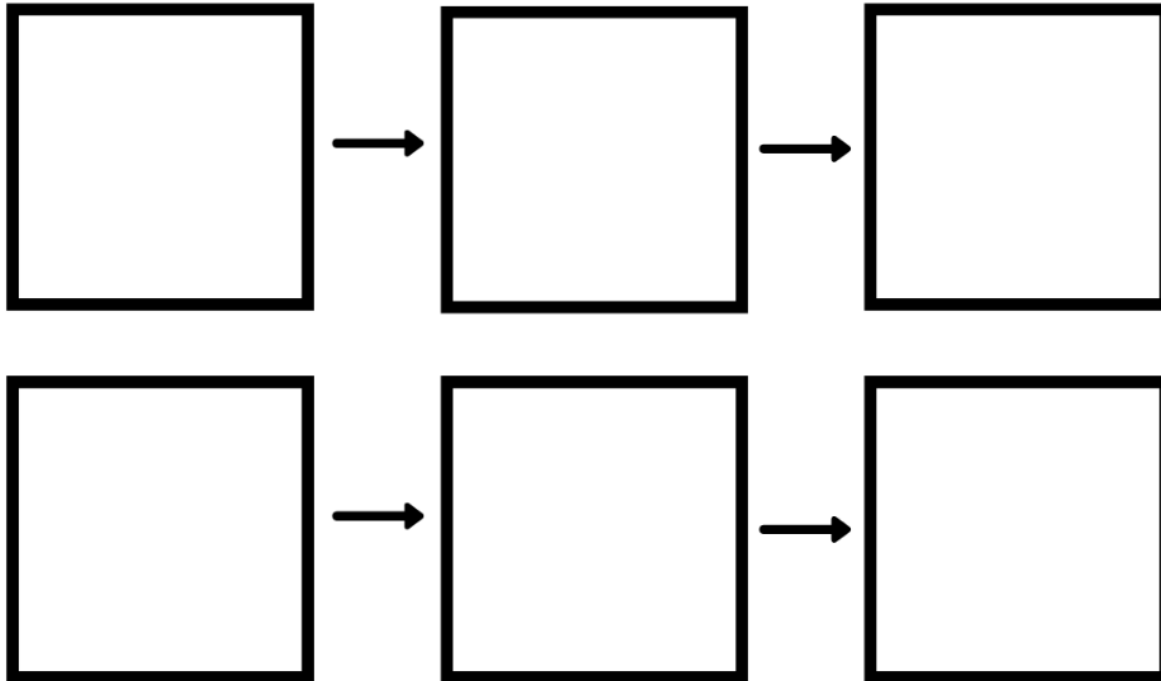




## My Awesome Client Journey Map

Platform: shopping

Outcomes + Optimizations



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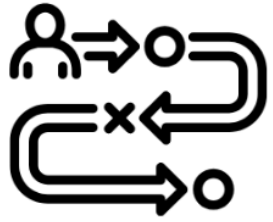
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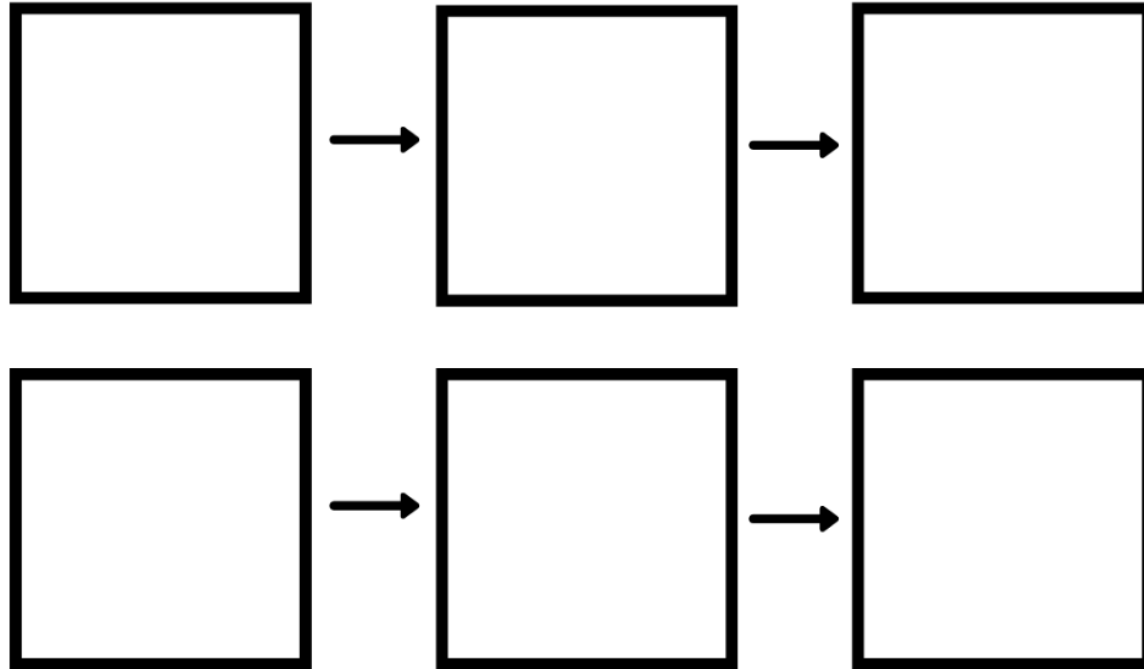
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## My Awesome Client Journey Map



Platform: \_\_\_\_\_

Outcomes + Optimizations

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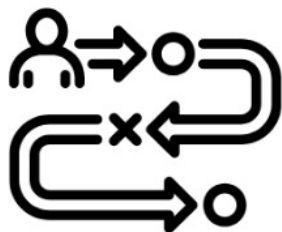
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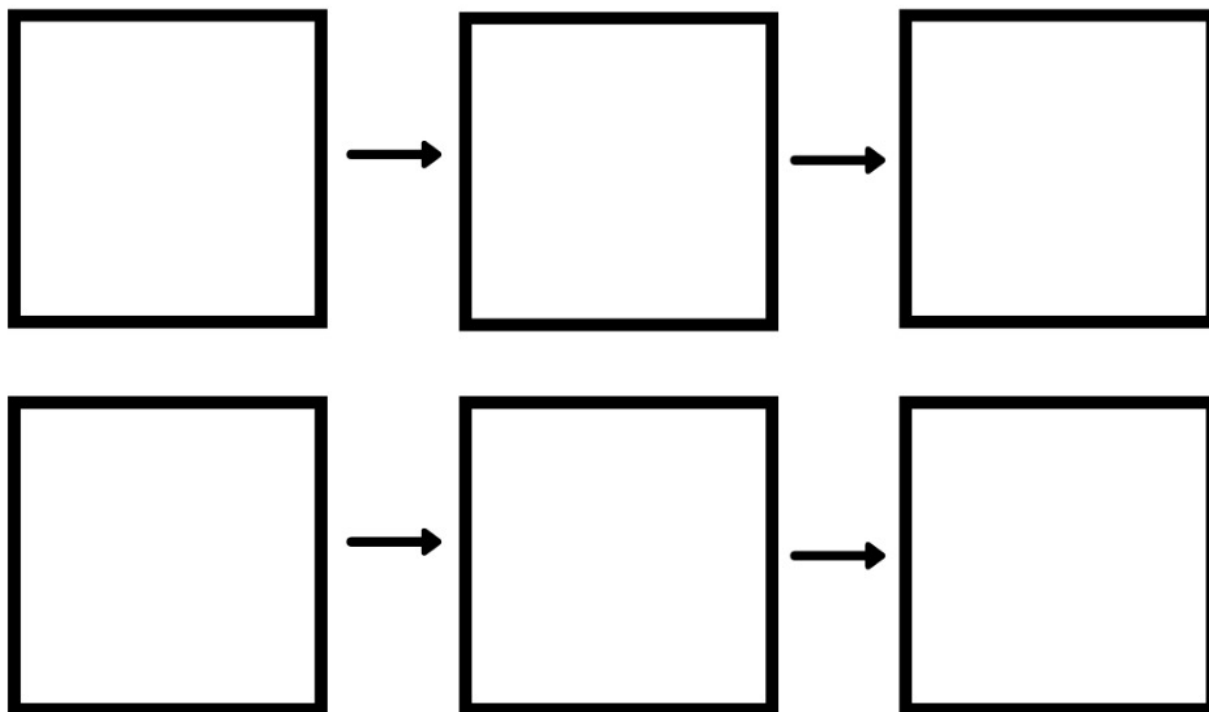


## My Awesome Client Journey Map



Platform: \_\_\_\_\_

Outcomes + Optimizations



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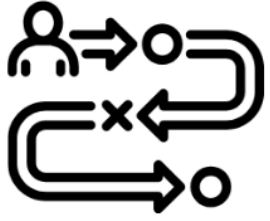
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## My Awesome Client Journey Map



Platform: \_\_\_\_\_

Outcomes + Optimizations

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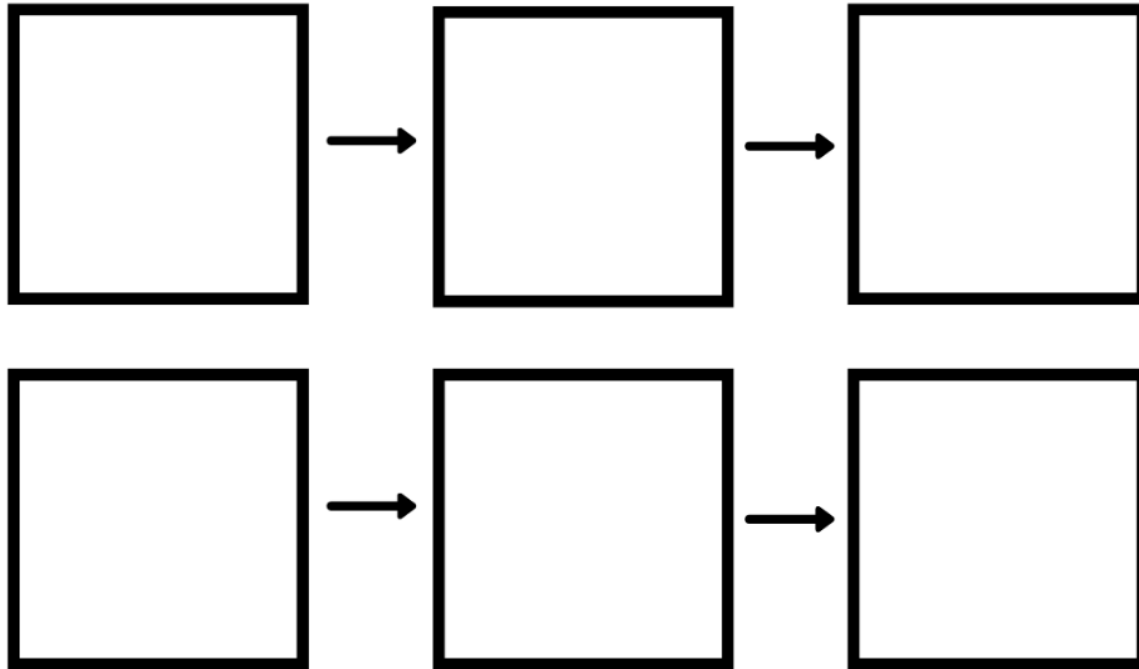
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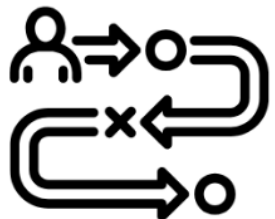
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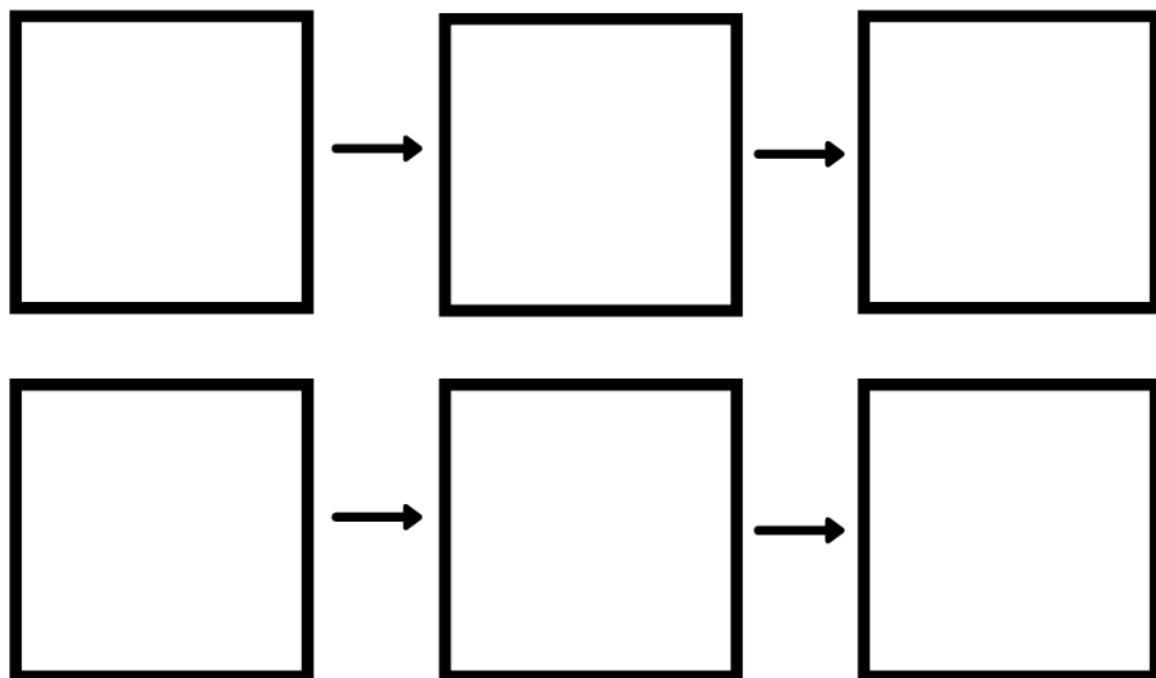


## My Awesome Client Journey Map



Platform: \_\_\_\_\_

Outcomes + Optimizations



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# **Elevating Your Client's Experience** **Offline & Online**



# **Why Clients **Leave****

**Retaining existing clients is one of the fundamentals of growing your business long term**

- **Feeling unheard, insignificant + undervalued**
- **Shaming social media content**
- **Inconsistent communication**
- **Inconsistent experience**
- **Inconsistent results**
- **Difficult to do business with**



# Why Clients **Stay**

**Consistently executing the fundamentals of an awesome experience increases client retention**

- **Feeling seen, heard, and valued**
- **Comprehensive consultation including pricing and timing**
- **Clear communication before, during + after the experience**
- **Easy to find, read and understand Agreements**
- **Consistent experience**
- **Kept promises**
- **Easy to do business with**



**When was the last time you **audited** your client experience?**

**What do they love most about their experience?**

**What do they love least?**

**What, if anything, would they change?**



**Are you dedicating enough **time** to each client and experience to deliver on your promise?**



# **Offline Client Experience Considerations**

**Clear, Simple, Seamless, Comfortable**

- **The comfort of the waiting area if applicable and if there is no waiting area, what does a client do if they arrive early**
- **A place to put belongings, beverages, and snacks that's simple to access**
- **WiFi password visible and/or in the confirmation communications**
- **Charging stations for devices**
- **Consultation including expectations of the experience, timing, maintenance, home care, budget, pricing, and content capture**
- **Quality of and simple access to beverage and snack service**
- **Quality of towels, capes, and aprons**
- **Hot towels infused into the experience or cool towels in the hot seasons**
- **The comfort of shampoo bowls (footstool)**
- **Aromas of space**
- **Sounds of space**



# **Offline Client Experience Considerations**

**Clear, Simple, Seamless, Comfortable**

- **Cleanliness of all spaces, corners, walls, changing room, restroom**
- **Size inclusivity of capes, drapes, chairs**
- **Staying present during the experience**
- **A special something to take home aligned with your brand**
- **Post experience follow up**
- **Focusing on creating value which differs from brand to brand**



# **Offline Client Experience Considerations**

## **Clear, Simple, Seamless, Comfortable**

- **Scalp detox treatment with every service**
- **Craft bags with logo stamps for eco brands**
- **Affirmation cards or crystals for healing vibe brands**
- **Mini lip balms for dryer climates**
- **New client gift bags with essentials for at-home care**
- **Simple, little, surprise gifts**
- **Same day or next day pick up for home care essentials**

**(This can be done via a simple e-commerce site which some software and apps have this feature)**

# Offline Client Experience Considerations

## Clear, Simple, Seamless, Comfortable

- Same day, next day, or scheduled pick up for home care  
(This can be done via a simple e-commerce site which some software and apps have this feature)

eCommerce Online Store for Salons & Spas

**Sell your products online without the hassle of a third-party marketplace**

Don't send your loyal clients to a generic retail giant, send them straight to your digital salon store! And because it syncs directly with your Phorest inventory, client info and marketing suite, you already have the tools to set up quickly and skyrocket your sales!

[Book a demo](#) [Request a quote](#)

**Square Online**

**The online store that's made to order.**

Make every aspect of eCommerce easier for you and your customers.

[Start free](#) [Contact sales →](#)

Clear All [BOOK | SERVICE →](#)

Crystal O'Reilly

Select a Category

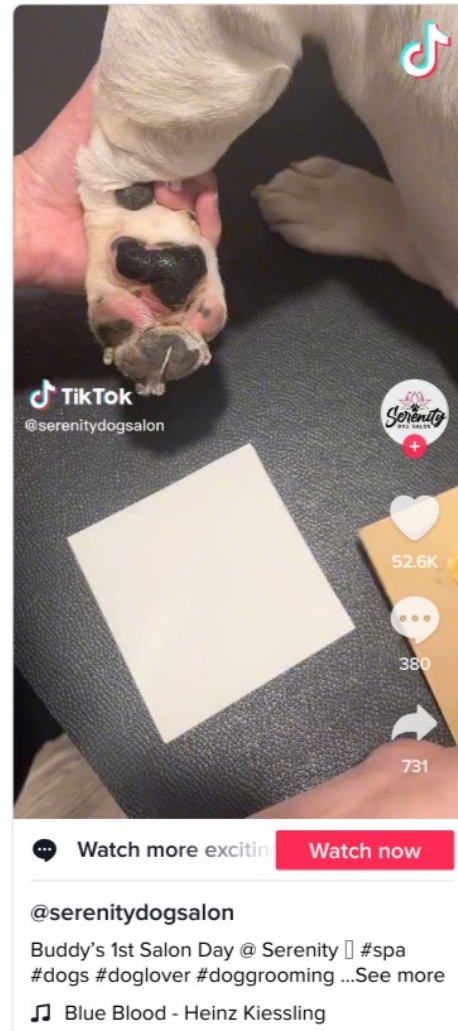
**Product Pick Up**

If you're in need of any product, swing by Selfish to shop. We also can leave products in our mailbox next to the front doors for you to pick up at your convenience, just message your esthetician to schedule a time.

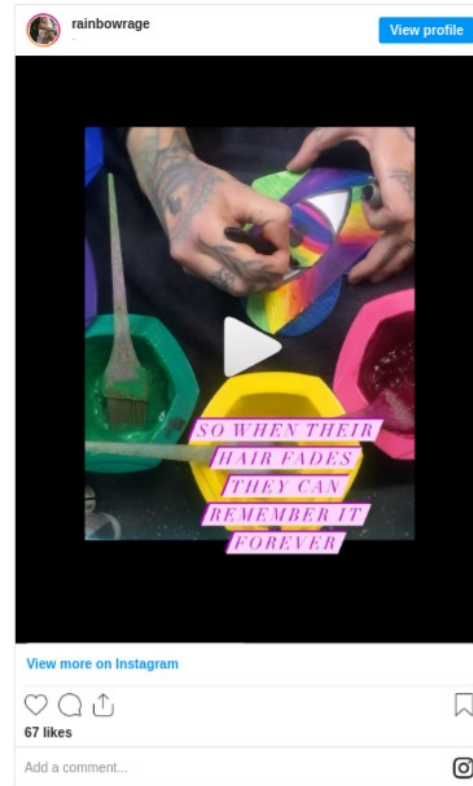
**PRODUCT PICK UP**

\$0 | 10 min [Unselect](#)

# Offline Client Experience Considerations



# Offline Client Experience Considerations



# **Offline Client Experience Considerations**

**Clear, Simple, Seamless, Comfortable**

- **Sanitized earbuds for folks who want to chill and listen to meditations or just want quiet**
- **Extra comfort with shampoo experience**
- **QR code to order at-home care**
- **QR code to look at the experience menu**
- **Pre-reserve the next experience during the consultation along with at-home care so the close of the experience is shorter and simpler**
- **Seasonal treatments and beverages**
- **New Parent experiences or packages**



# **Offline Client Experience Operations**

- **Do you have training for all team members on what the client experience looks and feels like from start to finish?**
- **How do you measure the brand alignment and effectiveness of your client experience?**
- **Do you have a proprietary consultation framework?**
- **Do you have different consultation frameworks for new and existing clients?**
- **Do you have clear persons responsible for greeting, changing, salon tours, refreshments, pre-booking, etc?**
- **Do you create and offer seasonal or relevant services, refreshments, and products?**

**If you **lead a team**, the happiness of your team,  
along with their seeing value in the experience is  
essential for elevating the client experience**



# **Online Client Experience Considerations**

## **Clear, Simple, Seamless**

- **Easy To Find Business Information**
- **Easy To Find and Use Booking Information**
- **Easy To Find and Understand Agreements**
- **Easy To Find and Understand Menu including descriptions of experiences, timing, pricing**
- **Easy To Reserve Virtual Consultations**
- **Easy To Find and Book As A New Client**
- **Consistency and Relevancy of Newsletters**
- **Relevancy of social content**
- **Relevancy of social content stories (captions)**





## The Hair Place

experience menu

### HAIRCUT EXPERIENCE

Your experience includes a relaxing 10 minute head, neck + shoulder massage, blow-dry, refreshing adult beverage of your choice + home care kit

Time: 1 hour

Investment: \$75

### COLOR EXPERIENCE 1.0

Color 1.0 is for simple color processes + techniques and for the color beginner.

Your experience includes a pre appointment consultation done in person or via video chat, a relaxing 10 minute head, neck + shoulder massage, blow-dry, refreshing adult beverage of your choice + customized color insurance kit

Time: 1.5 hours

Investment: \$150+



## The Hair Place

experience menu

### COLOR EXPERIENCE 2.0

Color 2.0 is for the more advanced color experience, including vivid color, unicorns and our rainbow girls. This experience includes a pre appointment consultation done in person or via video chat, a relaxing 10 minute head, neck + shoulder massage, style, refreshing adult beverage of your choice + customized color insurance kit

Time: 2 hours

Investment: \$200+

### COLOR EXPERIENCE 3.0

Color 3.0 is like rehab for your color. You likely had an oopsie at home or a previous salon. Your experience includes a pre appointment consultation done in person, a 10 relaxing minute head, neck + shoulder massage, style, refreshing adult beverage of your choice + customized color insurance kit

Time: 3 hours

Investment: \$300+

Building trust with you through healthy communication + transparency are is important to us at The Hair Place. This is why we include a consultation with every experience. Thank you for choosing us.



# The Hair Place

price list

**HAIRCUT \$75**  
**BLOWDRY \$50**  
**BLOWDRY WITH CURLING IRON \$60**  
**BLOWDRY WITH TWO IRONS \$70**  
**DEMI COLOR \$60**  
**PERMANENT COLOR \$70**  
**DOUBLE PROCESS \$80**  
**HIGHLIGHT \$100**  
**5 FOILS \$60**  
**BALAYAGE \$150**  
**OMBRE \$150**  
**BABYLIGHTS \$100**  
**VIVID COLOR \$90**  
**MENS CUT \$20**  
**MENS COLOR \$30**  
**KIDS COLOR \$25**  
**WOMEN OVER 50 COLOR \$30**  
**EXTRA TUBE OF COLOR \$10**  
**OLAPLEX TREATMENT IF YOUR HAIR MELTS \$10**  
**EXTRA WATER \$5**  
**ANNOYANCE FEE \$20**

# **Awesome Client Agreements Framework**



@passionsquared



# **Awesome Client Agreements Framework**

**What the experience and promise are.**

**The process for reserving an experience in detail.**

**What the communication process looks like in detail.**

**What the confirmation process looks like in detail.**

**What the cancellation process looks like in detail.**

**What the missed appointment process looks like in detail.**

**What you both agree to in this process and promise.**

**Simple opt-in/signing of the agreement.**

# **Awesome Client Agreements**

**Are aligned with your brand purpose, promise, and people.**

**Are clear, simple, and concise.**

**Are infused with healthy boundaries (not walls)**

**Uses language that is aligned with your brand.**

**Have strong systems to facilitate them.**

**Take into consideration that clients are human and things will never be perfect.**



# **Awesome Client Agreements Framework** **(example)**

**What the experience and promise are.**

**The Passion Squared experience is focused on ensuring you feel seen, heard, and loved. Our commitment to you is to consistently deliver on that promise.**

**What the communication process looks like in detail.**

**To ensure you have a joyful, seamless experience, we use both text messaging and email for our client communications during business hours which are 10 am- 6 pm Tuesday through Saturday.**

**The process for reserving an experience in detail.**

**We use an online reservation platform to ensure you can reserve your experience when it's most convenient for you, 24/7, 365. Simply visit [passionsquaredbooking.com](https://passionsquaredbooking.com) to see your current reservation, make changes, and reserve future experiences.**

**What the confirmation process looks like in detail.**

**Upon reserving your experience, you will receive both a text and email confirmation with the details of your reservation. You will receive two reservation reminders; two days before your reservation and 1 hour before.**



# **Awesome Client Agreements Framework**

## **(example)**

**What the cancellation process looks like in detail.**

If you need to cancel your reservation, you are given that option with the 2 day reminder text and email. If you need to cancel after you have confirmed your reservation, you can do that on our reservation platform at [passionsquaredbooking.com](https://passionsquaredbooking.com). There will be a \$50 charge to your credit card on file if you cancel inside the 48 hour confirmation window.

We do understand emergencies happen, if that is the case, please email us at [awesome@passionsquared.net](mailto:awesome@passionsquared.net) and we will find a solution. If we need to cancel your reservation inside the 48 hour confirmation window, a \$50 credit will be added to your account for future experiences or product purchases.

**What the missed appointment process looks like in detail.**

If you forget about your reservation after confirming and do not show up, there will be a \$100 charge. We do understand emergencies happen, if that is the case, please email us at [awesome@passionsquared.net](mailto:awesome@passionsquared.net) and we will find a solution for you.

**What you both agree to in this process and promise.**

We are honored you have chosen us to take care of your beauty and wellness needs. We promise to take care of you and ask that you promise to help us do that by adhering to our agreement.

**Simple opt-in/signing of the agreement.**

Click here to sign and agree. Check this box to sign and agree. Etc.



# **Awesome Client Agreements Framework**

**What the experience and promises are.**

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**What the communication process looks like in detail.**

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**The process for reserving an experience in detail.**

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**What the confirmation process looks like in detail.**

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# **Awesome Client Agreements Framework**

**What the cancellation process looks like in detail.**

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**What the missed appointment process looks like in detail.**

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**What you both agree to in this process and promise.**

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**Simple opt-in/signing of the agreement.**

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# Elevating My Client's Experience **Plan**

## Offline Experience

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## Online Experience

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# Promotion/Program **Planner**

**objective/outcome**

---

**goal**

---

**plan/budget/  
resources needed**

---

**create**

---

**execute**

---

**measure**

---

# Promotion Planner **example**

|                                         |                                                                                                                                                                         |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>objective/outcome</b>                | Seasonal menu items create interest, engagement, revenue + joy                                                                                                          |
| <b>goal</b>                             | Joy for my clients, reduce their stress + overwhelm, generate \$1000 additional \$                                                                                      |
| <b>plan/budget<br/>resources needed</b> | Create 3 new menu items, order supplies, create content for socials, newsletter + in salon<br>No additional resources are needed. The budget is \$200 for new supplies. |
| <b>create</b>                           | Have all things created by October 15 for launch. Booked create time.                                                                                                   |
| <b>execute</b>                          | Launched on time, clients seem excited and are booking the new services.                                                                                                |
| <b>measure</b>                          | Generated \$750 in add on revenue and made clients SO happy. I call it a success!                                                                                       |

## Next Steps

# **Auditing** Your Current Client Experience



**Discovery to booking**

**Booking to appointment day**

**Appointment day from beginning to end**

**Post experience follow up and communications**

# **Auditing** Your Current Client Experience



**Visualize and do a walk-through of your client experience**

**\*This can also be done as a team or tenant exercise**



**Book a few appointments at service establishments you've never visited before**

**\*Pay attention to the experience from discovery, to booking, experience and post-experience**

- ➡ After your client experience audit, determine which areas of your experience you want to adjust or elements you want to add**
- ➡ Make a plan for the adjustments and additions**
- ➡ Tap into the resources you need including A School Workshops to help bring your plan to life**
- ➡ Create, train if applicable, launch, measure, and adjust**
- ➡ Have fun creating awesome, aligned experiences**

# Elevating Your Client **Experience** Workshop



## Workshop Purpose + Outcome

In this Workshop, we will walk through the fundamentals of an awesome client experience, including the Awesome Client Journey, online and off. 2023 is going to be all about creating more value, trust, and care, to both retain current clients and engage future ones. You will leave this Workshop with a deeper focus and clarity on your brand promise, the experiences you create and deliver, and the parts you want to elevate for your clients.