

Operations training Client Experience

Purpose: Understand each persons role in delivering the company client experience.

Preparation: Define the client experience in a few (3-5 icons)

Facilitator: Begin the session by stating the name and purpose of the session. Then, break them up into small groups of 3-4 people.

Give the groups at least one of the defined client experiences from your list. Ask them to define the client experience and then come up with a list of how they can apply that client experience in their job.

EXAMPLE

Client Experience is “Teacher – defined: educate our clients to help them make better decisions.

Application ideas:

1. Send them information on emerging risks when we see them (like cyber).
2. Explain coverage to them when it isn't standard.
3. Ask them questions for understanding.
4. Always give them explanations and reasons for responses and not just answers.
5. Take more time with clients to make sure they understand things.

Facilitator: Ask each group to explain the list they have created. Have others add to the list. Document all responses and print off a master list for everyone to have when you are finished.

Ask all participants to identify three times where they deliver one of the client experiences through these items they created in the next month. Have them report back to the class.

EXTRA: You can also have a contest of catching someone else delivering a client experience.