



YOUR TEAM SUCCESS PODCAST

## Behind The Scenes: The Key To Creating First-Class Client Experiences

**Shannon Waller:** Today, I'm going to talk about a different type of preparation that can make a huge difference to providing superb results for your clientele and for your team. Stay tuned. Hi, Shannon Waller here, and welcome to Team Success. Today, I want to share with you what I call a Back Stage process that I think has us at Strategic Coach deliver phenomenal Front Stage results. And this is our practice of doing clearings before any kind of a meeting, any kind of a coaching session, any kind of a speech, kind of any kind of anything, and also our practice of doing a debrief at the very end. And it kind of sets up in brackets the experience that we're looking to create. Primarily we do this for workshops, but this is also what is really powerful to do before client meetings, before team meetings. And as you think about your life and how you can put this into practice, think about where you really want to show up as your very best self. You want to be incredibly present. You want to make sure you're focused on them and not on you. That is when to put this practice into place. And frankly, the more the better. You can even do it before every day if you wanted to. I'm not quite that organized, but maybe you are. So what is a clearing and what is a debrief? Well, a clearing is where we're getting a group of people together. And usually it's, you know, for our Strategic Coach workshops, it's the workshop success director who's in charge of all of the logistics. They manage the timing, they manage the music, they manage the breaks, they ring the chimes, which is really kind of fun. These are beautiful chimes that we have that are not obnoxious and allow us to herd our cats, because that's who our clients are and our team. So they do that. They're really in charge of managing the day. And when I'm coaching at the front of the room, they manage me. They're like, okay, Shannon, break all the rest of it. They let me know how many people in the room, if I wanna do breakouts, how the groups will divvy up, all of the things. And if I want their feedback on how something is going, then they're the ones who will say, hey, this is really landing, they might need more explanation, whatever their insight is into the day.

So that's usually one person. Then we usually have someone who is in charge of the client relationship, which we call program advisors. And so these are the in-between coaches between sessions. They're brilliant, they're business coaches, and they also are really great at personalizing the program to each of our clients. So this is the strongest relationship other than with the coach that our clients have. So these two people are always in it. And then, because we coach really cool stuff, our team also likes to participate, and we like to have them participate so that everyone knows what they are working towards. So as someone in Tech, or someone in Accounting, or someone who doesn't really see people, could be Operations, all the time, it's really important that they get connected to our Front Stage and what we are doing, and what our mission is. You know, our *raison d'etre*, as the expression is, to make sure that they're connected with what we're up to. Can't just always stay not connected to the Front Stage. So we can have a team of two plus the coach, two up to a team of could be eight or ten for the larger workshops. We try not to have more team members than clients. That is one rule, you know, good ratio. But we want to make sure that as many people can experience and benefit from the workshop as possible.



YOUR TEAM SUCCESS PODCAST

## Behind The Scenes: The Key To Creating First-Class Client Experiences

So this is how we run it. And then I'll talk about debriefs at the end. And the debrief is actually what people got out of the day. But we'll talk about that more in just a minute. So what do we do in the clearing? Well, we always, always, always start with a Positive Focus. And you've probably heard me talk about that before if you're a frequent listener to Team Success. The Positive Focus is people reflect on one or two things that they are happy about, that is giving them energy and excitement. It is a way for people to get really present in the room. It's usually just one thing. It could be something that happened on the weekend. It could be a work thing. Sometimes people are really excited about the day and that's what they've been looking forward to. Always fun to hear that. But it's kind of what's winning or what's working in their life. And I have to tell you, there are some very, very, very strategic benefits to doing a Positive Focus before anything, before any meeting, especially before you are looking to create a phenomenal experience to your Front Stage. So what people share is, again, something they're excited about or where they're winning, personally or professionally, it's all good. And obviously, people can censor anything they don't want to share, but there's just expected that people will share something that's of what's important to them, not because we need to know every single detail of people's lives. I mean, I think it's generous when people do, but it also lets me know where their head's at and how they're doing and what's important to them. What do they give meaning to? Because that is incredibly personal. So I love knowing what's really working for people and how we can support and applaud and just celebrate that as much as possible. So that's kind of the conversation. It's often not complicated. It's relatively fast. It's not a long novel. It's just this chance to kind of connect and say, hey, here's what's really working for me. It's fun. It's great to know people as individuals, not just as a group. And I think that's why this is so powerful. And the effect of the Positive Focus is that it gets everyone present. If you don't do this before a meeting, for instance, if it's in the morning, they're still focused on their crappy drive into work, or the driver who cut them off, or maybe the person that they cut off in the way of traffic, or maybe they're worried about their car, or maybe they're worried about how they drop their kids off in the morning, and they're still concerned about that. So we have to do something to interrupt that pattern of bringing the past into the present. And doing a Positive Focus gets people not only physically in the room, as we like to say, but also emotionally. And that's what's required, you know, being present is what's required to help create a really great experience. When you're present, you can pay attention to what is actually happening around you, not to the conversation in your head about what has happened or what's going to happen. So when we're focused on the past or the future, we're not here now. And that's what's important to be able to create a really great experience. So if you are committed to creating a great experience for your clientele, or if you're coaching your team for your team or whomever it is, then really taking a moment to do this practice is very, very powerful. So we always start with Positive Focus. Number one, get everyone there, start with a Positive Focus.



YOUR TEAM SUCCESS PODCAST

## Behind The Scenes: The Key To Creating First-Class Client Experiences

Then we will preview what's going to happen during the day. So here's the order. Often it's a chance for me to kind of talk through some of the key segues or conversations or key points I want to make. It'll help get me even more focused. Yes, I prepped, but this is kind of like getting close to the hour. And it really helps me get super focused on exactly what I want to create. So we all kind of talk through the day, get everyone familiar a little bit with the timing. Here's what to expect. I often, if I'm coaching, want our team to sit in, in the small group discussions. So I'll give that instruction, please join in. People don't usually need you to talk, but sometimes they will. Our team can help manage the timing to make sure that people switch and they hear the times because often they don't. So, you know, here's how the team can contribute and what they can get out of it. And the thing that I find most important is for people to state what they want to be true at the end of the experience. So in the beginning, it's like, is there anything you need to do or say in order to be fully present? Positive Focus, here's what the day's about. And then, you know, if it's five o'clock, I'll say at five o'clock, what do you want to be true? What's our intention for the end of the day? And I find this to be an incredibly powerful conversation. It kind of puts everything on lock in terms of I want people to leave feeling connected. I want people to leave feeling confident. I want people to leave feeling as though they're really well organized and planned for their next quarter or their next month, whatever timeframe we're working with. I want people to feel energized. It's kind of fun. I actually kind of just check and see if there's a word that comes to me as I'm going through this and like, oh, and sometimes I'll come up with some unique words. I'm like, oh, I've never said that before. But it's fun to go, oh, what's needed? And it allows me to kind of tune in to what is most important for me, for our team, and for the group in terms of what's going to be true. And then I'll often ask, what's going to be true for you? How do you want to be leaving at the end of today? And that's a great way to connect people with the material that they're going to experience. Like, I want to become more confident. I want to do some thinking and planning. I'm really looking forward to getting my thoughts down on paper, whatever that is. So what do they want for the clients? What do they want for themselves? And then we're done. Depending on the number of people, if we're doing a shorter two-hour event, it's 15 to 20 minutes of prep. And by the way, when I'm doing webinars with clients or I'm doing a presentation to a team and a couple of the key leaders are there, I do this with them too. So I'm not just doing it with our Back Stage team, I am doing it with everyone. Whether they're familiar with the process or not, I just lead it and I make sure that everyone is connected to this level. We do a Positive Focus.

I actually did a webinar the other day and I didn't know these people from Adam, I only met them very briefly before. I was going to be interviewing them as part of this panel, and I had everyone go around and do a Positive Focus, which meant really cool things came out that I wouldn't have known about them. It would have made it a much more transactional experience rather than the transformational experience that it was. And I was able to make some



YOUR TEAM SUCCESS PODCAST

## Behind The Scenes: The Key To Creating First-Class Client Experiences

connections. I was able to introduce someone after the session because they had an interest that I know one of our coaches has a common interest in. It just means I get to connect with them. I have an opportunity to create value for them. And I know them on a personal level, not just a professional level. And again, I think that's part of the magic and part of the secret. Then we go into the experience and we do what we do best. And that's a lot of fun. It's not that I don't focus on the team. I include them in my thinking, but I'm super focused on creating the result that I want to create for clients, which is always co-created. They have a vote in terms of the conversations and what's important and how the day goes. So they have a wonderful experience, which I'm really focused on being my very best, bringing all of my years of experience and being as present as possible, which means I can hear nuances. I'm tuned into what's important to them. My focus is not on me. And this is true for the team too. The focus is on the client. What do they need? What's important to them? What are they experiencing? How is this landing? Is it resonating? And I do this all the time. It was really fun.

I just had another, on the same day I did the webinar, had a wonderful coaching session with EOS implementers. And a conversation came up that was very rich. not on my agenda, let me be clear. It was connected to it, but it wasn't explicit. And we just had this really rich 20, 25-minute conversation as part of our four hours together that was amazing and touching and emotional and connected to the material, but just was where they wanted to go. But if I was running an agenda or in my head or distracted by how I thought people were thinking about me or how my morning had gone or how my night was gonna go, getting ready to pack and jump on a plane the next day, I would not have picked that up. So that is the value of being present to really make sure that you actually can tune into your audience and to be your best self to help receive what they're giving you and expand and elevate the thinking in the room. Which I think no matter what you do for a living, that's what we're trying to do, expand and elevate people's thinking so that they can feel more confident, more clear, and take action, because that's how things happen. So that ability to be present is huge. And what I'm excited about is this process really helps us do it. So we go through the day, then we get together at the end. So we say goodbye to clients, answer some questions. It's kind of fun. You know, it's a really great day when people don't want to leave and they stay there for a while. But we make a priority of not just leaving and wrapping up the conversations or talking for an hour and then going home. No, we reconvene at the end. And then we say, okay, well, how did that go?

Now, fortunately, and I think it's because our team is so well-trained and we are so good at providing that amazing first-class experience for people, which is one of our core values, that it almost always goes well. If it doesn't, it's because the fire alarm went off or something. There was a distraction. But even then, we're still looking to have it be an incredible experience. We're very focused. I want to say we work hard, but we are incredibly focused on making sure that everything works and that if we do have a blip, that we recover beautifully and people feel really well taken care of. So at the end of the day, we come back and then we're like, OK, how did it go? And then people share their insights. They share their experience. Here is a great



## YOUR TEAM SUCCESS PODCAST

# Behind The Scenes: The Key To Creating First-Class Client Experiences

interaction with a client. This person had this to say, you know, this was really critical. This point came through. And what's kind of fun is because we also do a wrap up with clients at the end, I probably should mention that, and I will do it, I don't care if it's one word. If I've only got five minutes and 30 people, I'm like, okay guys, write down your one word for what you're taking away from today and I will rapid-fire that sucker. So I make sure clients also package up their experience and settle for themselves their value. So that's another key point. So not only do I do it with our team, but I also have my clients do it. And then we come back and we share. And it's interesting to see how many times kind of an offhand comment, for example, there was this one client in that session I was telling you about with U.S. implementers. I like to use fun expressions. I like to enjoy life and be happy, and I like other people to have that too while we're getting stuff done. And he described the fact that 70% of his current life was kind of only okay. 70%. I'm like, oh my gosh, that must just feel like being nibbled to death by ducks. And of course the room laughed, which was fun. It's like a thousand paper cuts. None of them are actually going to kill you, but combined they might. But that was one person's takeaway, which was kind of fun. It's interesting to capture that information. So team members will share that too in our debrief. They'll talk about how the person showed up as a coach. They'll talk about an interaction where maybe someone came in late, but instead of making them feel bad, we took really good care of them. They'll often find out what happened to delay them. We'll make sure that, you know, we assist any way that we can. We'll make them a cup of coffee. It's all about really great hospitality. They'll talk about a breakthrough that someone had. They'll talk about a concept that really impacted them, whatever it is. Occasionally, there's something to fix, but not often, which is really lovely. I mean, certainly if the Coach Resource Team is responsible for coaching us coaches, then they'll say, hey, this worked really well. Timing was a little squishy on that. I'm like, yeah, that's not unusual for me or other coaches. But it always happens. I always make sure we get everything done. And they've actually coined a term for it called Shanimation. Somehow it all works. And as a coach, you kind of learn. It's almost like an accordion. What can you expand and what can you contract? So it's nice having had a few years walking this road because I've learned what to do. Like the rapid-fire wrap-up is another example of that. So we'll kind of go around and just say what the value was of the day.

And I have to tell you, knowing that you're going to start the day with a Positive Focus and really end the day with a Positive Focus as well, makes it an incredibly enjoyable experience and also allows everyone to show up, as I've been saying, in their best self. It's kind of profound. So it's a different type of preparation than most people think. Most people think preparation is really studying your materials, really making sure you know your content, being clear on what you want your client to do, but actually getting yourself not only intellectually ready, which you need to do, let me be clear, but this is a different type of preparation. This is getting yourself psychologically and emotionally ready to create the very best experience for your clientele. And that's why I think the clearing and the debrief is so critical. I know that I've been in other sessions where I've been the recipient of what people are delivering, and I know



YOUR TEAM SUCCESS PODCAST

## Behind The Scenes: The Key To Creating First-Class Client Experiences

they don't do this. They're running around at the last minute handling logistics. They're checking their mics, which we do earlier, by the way. They're all focused on the really nitty gritty in the room stuff, making decisions about the handouts, which frankly should be made before, as opposed to actually just getting themselves mentally, emotionally, and psychologically ready. And skipping that step, I think, is hard. And I think it leads to distraction. I think it leads to not being present. And I think it leads to a lesser result than what you could otherwise be doing. So why am I telling you all this? Because I want you to create that superb Front Stage experience for your clients and for your team. Because I think that's key. And I think it's not really a Coach secret, but it seems to be because no one else does this or not very many people do it consistently. We have a lot of fun doing it. It pulls a very diverse group of people in the morning together. People could be from all over the company, people you don't see very much and makes them a team, first of all. And that allows, that sets up that team for success to be able to deliver and create a phenomenal result and recaps and then kind of ties a bow on it at the end. So I just want to share this with you because it was something again I think that not many people know. Not many people practice certainly. And I think it can make a profound difference. So I wanted to share this little secret with you in the hopes that it will help you be exactly who you want to be. It will support you to support your team, your leadership, your entrepreneur, your team to show up as their very best selves. So that's kind of what I wanted to leave you with. Not a whole lot more to say about it. Any questions, please let me know at [questions@strategiccoach.com](mailto:questions@strategiccoach.com). But again, I think it's something that is the different type of preparation that can make a really big difference. That's all for now. Thank you so much for listening. Again, let us know if you have any questions or queries or examples would be super fun. And as always, here's to your team success.