

I had a fascinating chat with Mimi Fernandez about:

- Cultivating every step of the customer journey
- Story mining with your key stakeholders
- How friction and intensity brings opportunity
- Getting cozy with the sales and customer success teams
- Fine tuning your messaging surrounding problem solving
- How Covid has changed the customer experience landscape
- The need for human connection during the customer success journey

JL: Good morning everyone. I'm Julie Livingston of WantLeverage Communications and I'm here for another edition of PR Patter, my weekly show where I interview and chat with fantastic people from across my marketing and public relations network. I'm so delighted today to have Mimi Fernandez. She is Customer Success Director at Beyond Book Smart, which is an executive function coaching company for kids and adults. She's going to explain a little more about that in a minute. She's an experienced director of customer success with demonstrated history of growing revenues. Mimi is truly one of the best networkers I know. We've, over the years, have had these amazing masterminds together. She's my thought partner. She is skilled in business development, reputation management, customer success, and leadership. She started her career in public relations and journalism has a social work education background, so she really brings an immense breadth of experience and knowledge as a skilled marketer and senior advisor to companies across industry sectors. Welcome Mimi, it's so great to see you.

MF: Thank you Julie, this is so fun.

JL: Well, let's start by explaining what Booksmart does. Maybe you can elaborate on that.

MF: Yes, so Beyond Booksmart and work smart coaching. We do executive function one-to-one coaching for kids and adults, mainly for people who are looking to skill build around prioritization, organization, you know, helping them to think differently about how to attack either a school, work, or life in general, so we really believe that we're building life skills and helping people build their life skills.

JL: That's really fascinating. Do you work with a lot of people who have ADHD?

MF: Yep, people with diagnoses such as ADHD, some people might be on the spectrum, there's lots of different neurodiversity, neurodiverse ways in which people find us and use our services.

JL: Well, today's topic is marketing and customer experience: better together. Like the Jack Johnson song. And we were talking about this the other day and, you know, I think that it makes so much sense when the customer experience area, you know, the area of an organization that really maps out and cultivates every step of the customer journey, from before to the discovery of the brand, to their actual experience in purchasing a product from them after, and coordinating those efforts with the marketing department. But as you were explaining, that doesn't always happen.

MF: Yes, and I feel like there's an awesome opportunity for marketers to look at the full customer journey and oftentimes we're in the marketers, and I use myself as part of that, we're in the business of lead gen. We want to build a brand, have people understand our brand, and come in and hopefully buy us, or use our services. When it comes to the customer success piece of it, our discipline really needs those first touchpoints to be spot on. Because if we're in the business of retaining customers, once the salesperson has brought them in, we need to know that they came in with all the right information, and all the right tools so that they're not coming in confused while customer success is often the cleanup team as well. I think that, if you're in marketing, it's a great time and moment to resell a customer. So all that content you did to create the lead generation, to bring them in, can be repurposed to sell that customer and keep them as a customer or introduce them to new products and services.

JL: That is just so brilliant. You know, I create a lot of content for my clients. Mainly on LinkedIn, to raise their executive presence. But as a publicist, I'm also telling stories, to either capture the attention of the media and to get client featured in the news, or for different things. For marketing materials for clients, etc. I have found that my best stories come from the customer experience team. The stories that they tell me about how they're solving customer problems or an issue that came up for a particular customer, when I can really get that and work it into a LinkedIn post or media pitch even, and have clients solve that problem, that is golden.

MF: Yeah. It really serves you well to get close to the customer experience, customer success team... In the early days, we called this story mining, you know, we did narrative work, right, and we would dig in and get all your stakeholders, but even starting with that customer success team who should have a lot of those relationships for you... they are going to be your partner in success, or partner in crime, but your partner in success in finding those moments. I also think that the customer success team can really help with that emotional connection, too. Helping those stories have more of an emotional element. How did that customer feel when they came to you, and how did they feel when they left you?

JL: Wow.

MF: Sometimes it's good to tell the exit story, as well as the entry story.

JL: So they can really add more depth to it.

MF: Absolutely. They're spending time with the customer, getting to know them on a personal level. We want to make them the hero, and oftentimes it is emotional when they're working with you. So it's like, how do I help you professionally, how do I help you personally? Do you need a good restaurant? We're doing a lot of work already. So my why not, from a marketing or marketing team perspective, get cozy with that customer success team and see them as the pathway for those great stories.

JL: So how did marketing teams start to develop those relationships with the customer experience area? What do you think works best?

MF: Oftentimes it starts at the top. You know, oftentimes it starts with the CEO, who has smartly hired a customer success director or a senior chief customer success officer. So you know, when you're doing a lot of your story development and you're talking with the CEO or SVP, starting with them, how do you work with your customer success team, how do you work with the experience of the customer? A lot of people want to know that the CEO has its finger on the pulse, or her pulse. She or her has their finger on the pulse of what the customer experience is. And so if they don't, it's a little bit of a red flag, but also shows you that maybe I need to elevate those customer success people to the CEO's viewpoint in some way.

JL: And then how do you develop that collaborative rapport? Sometimes in organizations, there are silos. How do you build that with these different areas that may not have worked together before?

MF: I think it's about mapping who's reporting to whom. I'm lucky at Booksmart in that I'm very collaborative with sales and marketing. Oftentimes, customer success might report to the chief revenue officer or they might report to the CEO. Kind of mapping out who reports to whom, and kind of, you know, who pulls the levers. I also think that sometimes it's good to start at the bottom. Start with the person who's giving the overview of a product or service, or who is really delivering on a day to day basis. Ask for their time, and I think that they might have so many good nuggets that then you can celebrate them to their senior folks. And you can say, hey, I found these great nuggets from your person on the ground who's doing the day-to-day work.

JL: I love that. I think that's something that a lot of companies probably don't necessarily think of, start at the bottom. Those people are so intimately involved with the product, that on a daily basis, that's their world.

MF: Yeah.

JL: They often know more about it, and what the customer is reacting to.

MF: I spent a minute working in language strategy, and even just listening to the words they use and the words the customer uses, that can be so insightful, because those words are words you can just use. I mean, we're using Chat GPT, and we might as well use the words that people are using on the ground floor. Michael Lewis, I love Michael Lewis— he wrote MONEYBALL and some other things— he talks about the seventh level down, and how the person in the basement is sometimes your best source of content.

JL: Wow. That is such a great tip. Tell us a few stories from your experience at Booksmart or other places where customer experience really uncovered some opportunities that the company may not have known about. The issues that you solved.

MF: You know, one thing... When I was in PR, I worked in crisis comms, where things were intense. I always found where there's friction or intensity, that's opportunity. When you're rolling out a new product or service or a new way of doing something, listen to those friction points and say, "how can I turn this moment around?" We've both worked at agencies where there's difficult conversations, and sometimes they ended up with the beer at the local bar, where you could, you know, kind of like you know, commiserate together. So I do think those friction moments are amazing moments to say, let's get curious, why didn't that work, what language didn't work, what language didn't work, let's compliment the customer for, you know, you're gonna change our systems, because we didn't do it right. So I think that the customer success team has an amazing opportunity to turn those foibles into something more golden. I'll give you an exact example. We've recently changed how we're doing our billing, and had people ask us the tough questions— you know, why did my credit card get billed this, and I used it as a "hey, how are you doing? How is your son doing in college?" And they just went off. They just love talking about how things are going, and then I could say, "Have you considered this? Your son is graduating college, have you considered letting the coach help him find his first job? Or deal with the transition?" And they're like, they haven't thought of that. I do think that those moments can create opportunity.

JL: And you're building this relationship with the customer, you're building that trust.

MF: That you may not have had.

JL: You're now more than a product, you're a resource for information.

MF: Right. Yeah, and they might not have called you, they might have just canceled.

JL: That's great. How does Chat GPT come into this? Just before we went live, we had a little technical glitch. And I did a chat with Stream Yard, the streaming platform I use for PR Patter, and luckily they jumped right in and were able to answer my question, but sometimes Chat GPT is a little wonky. How does that filter into the customer experience?

MF: I'm starting to see more companies, you know, see the customer experience, customer success department as a pathway for Chat GPT. It's not new to have chats on the website that answer questions, knowledge-based questions, things like that, but I'll give you an example. I was creating a series of texts for clients, you know, I think texting is an amazing way to reach customers, to reach consumers, whether they like it or not, if they do answer it. They might often say, "I don't want you to text me."

JL: It has that sense of urgency.

MF: Yes, exactly. I was writing a few texts, thinking, how can I make this a little more fun? I put a text in Chat GPT and said, "Friendly, fun text about answering my survey." And it gave me some thought starters. I mean, I changed and didn't use every word it gave me. But at least it

can give you some thought starters about what's kind of in the zeitgeist, what are people thinking and talking about, so you don't sound tone deaf or sound too, you know, boring?

JL: Right. Or prescribed. I've been using it more for combating writer's block. I write so much every day and sometimes you have those moments where you're just staring at that screen and nothing is happening. I have used it to give me a shock in the arm.

MF: Throughout my career I've used people's starters as a way to see how I can enter a press release or a white paper, so this does make it a lot more efficient. I told you this yesterday, but I actually worked on the IBM Deep Blue chess match. It was back when the promise of AI was that it was going to solve cancer, it was going to solve flight delays, it was going to solve all the things that chess, as the starter point... It could have just solved writing, and everyone would have been like, yes, that's what I need. Communication.

JL: Early buy-in.

MF: I just needed something simple.

JL: What are some of the other things you're working on in terms of enhancing the whole customer experience?

MF: Well, I think that, I go back to the onboarding piece. What is that first touchpoint feel like to our customers? Getting cozy with the sales team is so important when you're in customer success and customer experience because how they heard the information is what they will hold on to and expect you to deliver on. So if we're not in lockstep about what they product is going to deliver on, then we've got problems. Retention is out of your hands when the client or customer feels what they should have been expecting.

JL: Huh. So you really have to pull this apart at every touch point. And that first one is so pivotal, because that could really make or break whether they'll come back or continue.

MF: And then I always go back to emotion. I do think that every purchase, whether it's your own money or your company's money is emotional. And I do think that marketers do a good job of teasing out that emotion to get people excited about the business. But I think we have to remember that we have to keep infusing that emotional connection throughout the process. I think Chat GPT is going to be great to give us the words, but when we have people and systems in place that remind us that it's an emotional and a human to human connection, then that tool will just enhance the work that we're doing.

JL: I think people want to connect with people, no matter where you are. These other conveniences are just that, but I think ultimately it's human connection. I wonder— do you think that Covid exacerbated that?

MF: The need for human connection?

JL: Yeah.

MF: Yeah. I still feel it. I went to a party last weekend and I was like, I was so happy I couldn't believe how nice it was to connect. I knew one person. But I was like, it's so great to be in a room of people who want to talk to each other and be connected in some way. It didn't hurt that there was a tequila tasting going on.

JL: No, but it's really true. And that's where the magic lies. I went to a networking event recently in New York, and it was like on fire. I think people have been, we've been so separated and isolated from each other, you know, over the last three years, and even though things are sort of back to normal, it's different. It's just a different landscape. We're using Zoom more, we've gotten used to not scheduling those in person coffees or meetings or lunches, so you know, getting together and having that human interaction is just vital.

MF: PR and marketing, that's why we got into this business in the first place. So, let's get back to basics and invite people out for coffee, create lunch and learns or lunch connections. I think sometimes even as leaders we have to remind ourselves to stop and have an agendaless meeting, you know, just come together. If you can't be in the same room or the same city, just try to remind us that we can have winding and meandering conversations that don't always have to have a direct point at the moment.

JL: I can't believe we're almost at time. If there's something you can leave us today about customer experience, and how it's been evolving...

MF: Well, the customer success discipline is really growing. I keep meeting people, and nobody went to school for this. There's a lot of convertible experiences like hospitality, teaching— a lot of people can pivot their careers. And I've pivoted from PR and marketing to customer success, customer experience. And really enjoying this position of understanding the marketing side, understanding the PR side, but being able to bring it all together in a different way.

JL: And that sharing of information that you're talking about between departments is so important. That's what really is the backbone of success for any organization. When marketing is really in constant contact with the customer success and customer experience area. You can constantly finetune on all platforms what your messaging is and the problems that you're solving for your customers.

MF: And connecting the dots at all levels. If you ever feel disconnected in some way, there's probably a right feeling that you need to fix in some way.

JL: Mimi, where should people get in touch with you? Is LinkedIn the best way?

MF: Yes, it's Michelle Mimi Fernandez. Michelle is my given name. And also [BeyondBooksmart.com](http://BeyondBooksmart.com), if anyone is interested in executive function coaching.

JL: Thank you so much for today. And everyone, we'll see you next time for another installment of PR Patter.

MF: Thank you Julie!