

**Ep #07: Turning Your Team Into Heroes and Your Customers Into Raving Fans with Patti Mara**



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**Crystal Cooper**

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Welcome to Net Worthwhile, Do More with Your Wealth, a podcast designed to explore financial topics from a broader perspective than just the numbers. We'll look at the emotional impact of financial decisions and how you can use your wealth to live a great life. Thank you for tuning in.

Crystal Cooper: And we are here today with Patti Mara who has made it her work to work with hundreds of entrepreneurs and owned and operated businesses to help them see through the customer's eyes and ultimately increase their growth, customer retention and profit. Thanks for joining us today Patti.

Patti Mara: My pleasure, Crystal. Thank you for having me on your podcast. I'm excited to connect and share with your audience.

Crystal Cooper: Yeah, awesome. So as I was saying, you've made it this passion of yours to help entrepreneurs empower the customer experience. How did you get started in doing that?

Patti Mara: Right. That's an interesting story. I had a part time job when I was in university back in the 80s and I worked at a small chain bookstore in a mall and it wasn't even from a scale of the chain bookstore, it was, it was small. It was just a tiny footprint. And I had great manager and the manager trained all the team that whenever somebody came into the store, we were to stop what we were doing, we were to say, "hi, how are you? Can I help you find anything?" If they were looking for something, we took them to the section, put the book in their hand. If we didn't have it, we offered alternatives, made suggestions or saw if we could order it in for them, and just simple things that if there was a customer in the store, they had our full attention.

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Patti Mara: And what was interesting about that? First of all, it was fun. We had pretty good team retention even though most people were part time. It was fun. It was a great energy and people enjoyed working there. We routinely had customers come back in the store and just say thank you that of all the stores they went through at the mall, it was the only store they felt welcomed and appreciated, and just said thank you.

Patti Mara: What was interesting at the end of the year, that small store in the 80s was projected—the budget had been, target had been \$500,000 gross revenue. And at the end of the year we had generated just over a million dollars gross revenue. So a little over double what had been projected. And really on the basis ... it wasn't a high retail period in the late eighties. It was, that was just pivotally based on the experience we were creating with customers.

Crystal Cooper: Wow. And so you said something that kind of hit. You said it was fun. And so I like that because I think one of the things that for business owners and entrepreneurs is it doesn't feel fun all the time. And so you kind of, what I heard is like you guys got to the end and you're like, "Whoa, we also hit some, doubled our goals and it was fun." Can you talk a little bit about that because you, you guys hit goals but you were having a good time.

Patti Mara: Absolutely. Literally, I think that it's creating a culture that, well, the byline of my book and I know we'll talk about that, but the byline of my book is Turning Your Team Into Heroes And Your Customers Into Raving Fans. And if we're talking about the chicken or the egg, I think it starts with that you're turning your team into heroes. That you know, everyone wants to feel like they're winning in their job and we want to have a sense of purpose. We are way beyond that people are focused on

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piecemeal work. We want to feel like what we do makes a difference regardless of what we do. So when you set up your team to win and you really give them the tools to realize the value they have to offer, which is beyond transactional, then it's fun. It's a great culture; you have higher team retention and you're creating a consistent great experience for your customers, which also, that's a profit generator in your business.

Crystal Cooper: Great segue into you just actually launched this book. So exciting. Congratulations.

Patti Mara: Thank you.

Crystal Cooper: Called Upsolutions: Turning Your Team into Heroes and Customers Into Raving Fans. And I think this is a really poignant book for entrepreneurs and business owners because it's obviously talking about what every business owner wants to understand, you know, how do I make my businesses success? But you also touched on this really amazing side of purpose and fueling that side as well. Can you talk a little bit about how it's kind of touching on both of those pieces?

Patti Mara: Absolutely. Thank you. I think there are some really significant mindset shifts right now. It's a challenging business environment. I find that most business owners are playing the long game of business right now, independently owned businesses, that they're trying so hard to compete with big box stores chains and they're being forced to compete on price squeezed. But there are new business rules. There are literally ... it's a shift from sales to solution focus from transaction to relationship focus. And that significant shift is if you're in an independently owned business, if your team are tuned into that their role is to create solutions for the customers that interact with your business and to build relationships with them, that ties

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into purpose. That's ... we get really just worn down by a transactional focus.

Patti Mara: And here's the interesting thing, there's two key pieces with this: when you realize that your role with an independent business is to provide solutions and develop relationships with your best fit customers, then that's the game of business the chains can't play. They're solely in the transaction business. So you win at that game that they can't touch. And the other thing, this is a key piece, is starting to be aware of thinking of your business from the customer's perspective. And it's a key awareness that your customers don't even know the questions to ask to make an effective buying decision. So this comes back to your team with purpose. If you understand that your team members, if they've been in your business for at least three months and are having daily contact with customers, they're actually experts compared to your customers. And just guiding them to make an effective buying decision is creating a huge solution. And that turns them into heroes. They literally are focused on creating solutions. They're winning with what they're doing every day and that creates a sense of wellbeing.

Crystal Cooper: We're so spot on. At SignatureFD, we have, and you and I have talked about this, we have these client communities and one of them is for entrepreneurs and we talk about this all the time. Sometimes people come in and what they're really looking for is "tell me the questions I'm supposed to be asking." It's not that I ... I'm not necessarily coming in looking for all the answers. I don't even know the questions I'm actually supposed to be asking at this point. I'm looking for a partner in the journey of discovery.

Patti Mara: Exactly. Exactly. And the only advantage I have when I'm a customer consumer is I know, I don't know the questions. Most

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customers don't even know they don't know the questions. I mean, I still don't know them when I'm a customer. I just have an awareness that I don't know them. But it's a huge advantage. I mean, all of us can think of times that we spent way too much money and time because we bought the wrong thing not knowing the considerations we should've put into effect.

Crystal Cooper: So if you say you are a business owner right now and you are maybe 10 years in and you were doing it just fine to this point, but you know, not great, you're not having, as you say, fun. But it's just okay, what are some of the things, some of the tools that an entrepreneur or business owner could start doing now to kind of start shifting some of that mindset and start being able to see through the customer's eyes?

Patti Mara: Perfect. Well, I think there's three key mindset shifts. Crystal, we were talking about this, when you have the awareness of that shift, then you have the freedom. Literally every time you have that awareness that causes your shift in thinking which leads to freedom. So I think the three key mindset shifts right now, one is that there's always an opportunity in change. We tend to focus on where we are feeling constricted, but the moment you feel constricted, if you can flip and say, what's being communicated here? What can I learn that would open up a new door or a greater freedom?

Patti Mara: I had an entrepreneur who had a motorcycle store, and they sold motorcycles, but they sold a lot of equipment. And one of his challenges, one of his complaints, was that somebody would come into his store and get properly fitted with a helmet and then go and buy it online for 30, \$40 less. And he was passionate about helmets because a properly fitted helmet could save lives. And most people were buying them because

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they matched the bike. So if you look at the opportunity in change, we had a really interesting conversation. I said, "well why don't you have a helmet fitting process? Why don't you create a helmet fitting solution and that they can pay you \$50 to be properly fitted and potentially save their life. And at the end they get a \$50 coupon to buy it in your store."

Crystal Cooper: "Brilliant."

Patti Mara: So just to flip, right, just flip. So opportunity and change. The next mindset is understanding your customers, looking at your customer, your business from your customer's perspective and training your team to look at this way. Because your customers will always tell you what they want, what they need, if you're listening. And the third one is that you have a wisdom and experience in your business and that's back to that customers don't even know the questions to ask to make an effective decision; that just helping them through well, the buying decision. Actually I went to buy a flat screen TV a number of years ago and you know I just thought I was getting flat screen TV because that was a new thing, and I had a great support in the clerk who asked me questions like, "well how big is the room you want to put the TV in? What do you like to watch on TV? You know, what's the audio? Would you like a home theater? And these are the things to think about." And I had no idea. I ended up, I walked out, this is when LED TVs first came out. I walked out paying \$1,200 and walked in expecting to pay \$400 but I was happy because of the experience. Because of the experience and I was happy with the purchase knowing that it was exactly what I wanted.

Crystal Cooper: That's what drives it. If you're not selling a product but you're selling a solution, you will pay more money and feel happier and go back. You're creating ambassadors for the

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brand. Is that kind of what you mean when you talk about an on brand experience and creating that all the time?

Patti Mara: Yes. Yes. So the team actually understands what's the value of the business, not what you sell. I think what you sell, the products and services you sell, is just a vehicle for you to deliver value. You have to be clear on the value and an interesting, if you're not communicating why choose you, the value, the solutions you provide in your business, you and your team, then that's when your customers choose the lowest perceived price because it's the only information they have to go on.

Crystal Cooper: And I mean the price game is just a losing game really. Anybody can compete on that.

Patti Mara: Sure. Well, and it's what you compete on if you don't have any other way to say, "why choose me?"

Crystal Cooper: When you talk in your book about UpSolution, tell me a little bit about what that means.

Patti Mara: Oh, great. Thank you. So Upsolution, we keep hearing about upselling, upselling. Upselling is, you know, kind of, "would you like fries with that?" It's bundling up the sale to increase the transaction per customer. UpSolutions is 180 degrees. It's literally the mirror opposite, which is it's all about the customer. It's paying attention to what is the customer need and then how can you offer them a solution. And I have a, I call it the UpSolution Recipe in the book, which is basically a four-step applied observation. What do you, based on the wisdom of your team and your business, what do they already know about somebody interacting with your business, with your company? And based on the applied observation, what are some step



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choose probing questions, which is often just the questions that guide someone to make an effective decision.

Patti Mara: Step three is what is that UpSolution you can provide? What is ... they may have come in thinking they were looking for a shelf on their wall, but now you've helped them identify what type of shelf you can put what they want on that it won't fall off the wall, because they wouldn't know to look for that. And then the fourth is what's the ongoing relationship? You've just created a solution based on what you've done, what's the ongoing, how are you a solution partner for your customers? So not only will they keep coming back to you but also they have a way of talking about you to friends, family, their community. So this is turning your customers into your marketing and your raving fans.

Crystal Cooper: You have a bunch of, in addition to your books and you have a bunch of resources that you also offer. You've mentioned touchpoints and scorecards and we are going to make those available for our listeners through a URL that we'll provide at the end of this podcast. Can you tell us a little bit about how those are used and how entrepreneurs can use that?

Patti Mara: Perfect, thank you Crystal. Yeah, so I created a tool called the TouchPoint Scorecard. We all have the ability to look at our business from our customer's perspective, but it's like building a muscle, it takes some practice. So I created the TouchPoint Scorecard. It's a easy to use tool that really enables you and your team, so this is great to do with your team members to kind of flip and look at all the different compartments at every different touchpoint where you interact with a customer and look at it from their perspective.

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Patti Mara: So yeah, so that will give you access to the TouchPoint Scorecard, which is completely customizable and some training, it really aids in having everyone being able to fine tune that awareness.

Crystal Cooper: That's so awesome. Now what's great about these tools and these resources and everything that you're offering is you are an entrepreneur yourself, right? So you, you've walked in the shoes and you get it. From the personal standpoint, what I love is this, the mindset piece, right? And like I said our signature entrepreneur is also a community within SignatureFD, and SignatureFD is co-founded by three people who currently work here. And so they are entrepreneurs themselves and have walked in the entrepreneur shoes and they get it as well. And, and so that's what I also love about this company. And so from the personal standpoint, the mindset piece is also very important because it is really difficult starting and running a business.

Crystal Cooper: And so when you talk about the fun aspect of it, what are some of the things that entrepreneurs can do to keep the perspective of when you are finally shifting from you are growing the business and you are starting the business, and how do you balance keeping the business going and being with family and taking time for yourself? And because at the end of the day you're the person who is doing this and you've got to take care of yourself too and you are part of how this business stays healthy. How do you kind of keep that going as an entrepreneur yourself? How did you manage all of that?

Patti Mara: It's a very, very important point. You know, as entrepreneurs we can burn out very quickly, especially if we tend to work all the time. I mean one of the challenge of being an entrepreneur is that you can work all the time. And so sometimes it means we

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do work all the time. I very strongly guard my free time. I, you know, most weekends I don't do anything work related. I have regular vacations and I don't check email when I'm doing that. I make sure my team's set up to win while I'm away, but I'm very conscious of recharging my battery and having that balance.

Patti Mara: I will say, I think with entrepreneurs, and this really is for everybody, it's true for everybody. We can lose ourselves by being driven by some kind of a purpose. I think it's important to always come back and do that check-in. Am I having fun? Am I doing things that I love to do? Am I doing, what? Am I making a difference? Am I working with the people that I want to work with? I would define a target audience of the business, is the people that the entrepreneur and the team want to work with, and that the people enjoy what what the business provides and they're willing to pay them for it. So it's almost like it's almost like a barometer. Are you going too far down a hole? Do you need to step back and reevaluate again that mindset shift, there's an opportunity and change. What's the constriction telling you?

Crystal Cooper: You know what you've hit on there, and kind of what we've focused on in terms of wealth, is the why. And I think what happens sometimes is, as years evolve and you get into the nitty gritty of building the business is you lose sight of the why. And so you forget that you started this business because you always wanted to do what you love or work with the team that you love, you know, whatever that why is, you sort of lose it maybe a little bit.

Crystal Cooper: And that's when you start to lose sight of yourself, lose sight of how you wanted to have free time, how you wanted to be able to take vacations and enjoy them. And you kind of lose that a little bit. And maybe that's where entrepreneurs burn out.

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Patti Mara: Yes. We forget to bring into context the cost of not taking the time off to recharge your batteries.

Crystal Cooper: Yeah. Yeah. Oh wow. Well this was awesome. Thank you so much Patti. Really appreciate it and I did promise our listeners that we would make sure that they got that URL and it is [Pattimara.com/signaturefd](http://Pattimara.com/signaturefd). is that correct?

Patti Mara: Signature FD.

Crystal Cooper: Yes. Signature FD. We have created a special URL for you guys where you can find that TouchPoint Scorecard. You can also find access to purchasing Patti's book, which is called UpSolutions, Turning Your Team into Heroes and Customers into Raving Fans. Thank you again so much, Patti for joining us. Really, really appreciate you sharing these insights with our entrepreneurs today.

Patti Mara: An absolute pleasure, Crystal. Thank you for having me on.

Thank you for tuning in to Net Worthwhile, do more with your wealth. If you want to learn more about how to build your own net worthwhile, visit us at [www.signaturefd.com](http://www.signaturefd.com).