

# Using Case Studies to Inspire Your Team

## Look for Inspiration Internally

As you begin to see examples of unreasonable hospitality happening within your firm, be sure to celebrate these (See our other resource *Celebrate and Inspire with a CX Shining Star Award* for additional information about formalizing the celebration of positive outcomes). Write up these case studies and share throughout the firm – not just with the involved parties or that department. But don't just announce and recognize, dig into the how and why of the action:

- What was done?
- Who is the client and what did we learn about them that we were able to act upon?
- How did we become aware of the information gathered that allowed the action to be taken?
- What was the timing of the instance?
- What was their reaction? Focus on the words they used to describe the feelings or emotions.

By getting into the details of the instance (creating a 'case study') you provide a fertile environment for others to springboard from that one instance to other opportunities they may encounter. Causing someone to think "well, I could do THAT!" is a first step in them finding ways to wow your clients.

## Look for Inspiration Externally

All industries are guilty of the feeling that their world is special and unique – that what works in other industries cannot work in public accounting. We miss opportunities to gain inspiration and find new paths forward by exploring outside our own backyard.

Instances of people going above and beyond frequently appear in the news. Have your team watch the news for examples you can share. Again, when sharing them, provide as many details as you can find. Tie the sharing of the case study back to the goal your firm has set around this effort of changing behaviors.

One area in which we all tend to naturally practice unreasonable hospitality is with family. When we buy gifts or plan to provide a surprising and memorable experience to a family member, we think of them individually – what do THEY like? What makes THEM smile? What do I know about THEM? And...we act accordingly. These are opportunities to share very relatable case studies revealing the essence of unreasonable hospitality.

## Two Examples:

In the video at the right, Minneapolis-based author and speaker, Ryan Estis, shares a story of a coffee barista making a difference to everyone she serves. The story includes many of the details – including how the incident made him feel, the observations of others experiencing it too. The barista starts with a decision she makes consciously and demonstrates how even in the brief encounter of a Starbucks coffee service – she individualizes the experience – treating each customer as a unique individual with unique needs. This example showcases the importance of asking good questions, being a great listener, and the general skills of self- and social-awareness. This example may not showcase all aspects of unreasonable hospitality but there are related lessons to highlight.

Ritz-Carlton has a famous "\$2000 Rule" – any staff member may spend up to \$2000 to resolve a guest issue. We think of this as resolving complaints but it is also leveraged in unreasonable hospitality as in this example. A bartender overheard a patron mention they forgot their tennis shoes on the plane - they were disappointed they wouldn't be able to play. The bartender worked with the housekeeping staff to get the guests shoe size and the bartender bought shoes for the guest. This demonstrates several key aspects of delivering unreasonable hospitality!

Transactions  
→ Experiences

## HEADLINE



## CUSTOMER INTRO

Highlight who was involved

## SITUATION

Background and context

## WHAT THEY DID

Outline the actions that made a difference

## IMPACT

Client reaction and feelings

## INSPIRATION

Make the connection to what we do

## STICKY QUOTE

Something that rings a bell



[YouTube Link](#) [6:49]

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