



CLIENT ENGAGEMENT INSIGHTS

When a Cocktail Is Just a Drink

**Decoding the Missed Moment in Client
Engagement - and What to Do About It**

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In this Client Engagement Insight paper, we explore a real-life case from the service industry that offers valuable parallels with any client-facing interaction - particularly in retail and hospitality. This paper is designed to provide frameworks, reflective perspectives, and actionable pathways for professionals seeking to activate a powerful client experience strategy.



The Story

A few nights ago, I stepped into a sleek cocktail bar in New York. The reviews were strong, the space beautifully curated. I took a solo seat at the bar and was quickly handed a menu. A chilled bottle of still water arrived - \$7, professionally served. I ordered a house take on the Whisky Sour and guacamole with tortilla chips.

The drink arrived, garnished and balanced. Execution? Impeccable. Interaction? Absent.

No "How are you enjoying it?" No "We infused that with cardamom - can you taste it?" No check-in, no energy - just task delivery.

Later, another bartender noticed my chips were gone, but guacamole remained. "Would you like more tortilla?" he asked with a nod. Simple. Human. Unexpected.

It made me pause. Why did one bartender simply serve, while the other engaged?

The Underlying Question

Why do some professionals meet only their functional need, while others spark emotional and sensorial engagement? Addressing this requires examining the layered structure of client expectations within luxury service environments.

A topic of Engagement to reflect on

Client engagement is the intentional, emotionally attuned connection a client or service advisor establishes through personalized, sensorial, and value-rich interactions that foster trust, loyalty, and enduring affinity with both the individual and the brand-product. Engagement arises through two key pathways: client-initiated cues (e.g., "Can I try this on?") and brand-directed prompts (e.g., CRM invitations or curated storytelling moments). Each serve as an opportunity for the advisor to elevate a transaction into a meaningful, emotionally

resonant experience. In luxury service and selling, such moments are not optional—they are essential to meeting the standard of excellence expected.

The 3 Layers of Client Expectation

Understanding client expectations is essential to creating meaningful luxury experiences. These expectations unfold across three layers: functional (delivering the expected product or service accurately and efficiently), relational (establishing emotional connection through presence and empathy), and sensorial (engaging the senses to create a memorable, immersive experience). A client may seek one, two, or all three at any given moment, and it is the advisor's role to read which layer is in play—adapting to the client's mood, context, and shifting needs.

1. Functional: "Give me what I paid for."
 - The drink arrives, the order is correct, the bill is clear.
2. Relational: "Acknowledge me. Be present."
 - Eye contact, warmth, curiosity. A human moment that says: I see you.
3. Sensorial: "Make me feel something."
 - Visual flair, scent, touch, taste, sound. A multisensory moment that surprises or delights.

Decoding the Engagement Gap

Despite good intentions, many professionals fall short of meaningful engagement. This often stems from three common gaps that limit their ability to connect beyond the functional:

1. Mindset Blind Spot: They may not realize that engaging emotionally or sensorially is part of their role.
2. Skill or Confidence Gaps: They may feel awkward or unsure how to engage.

3. Lack of Behavioral Cues: Without clear rituals or behavioral anchors, they default to task delivery.

Strategic Response: Mindset First, or Behavior First?

To close the engagement gap, organizations must decide where to begin: by shaping mindset or by guiding behavior. Mindset refers to the internal attitudes, values, and emotional dispositions that shape how professionals perceive and approach their roles and tasks. In contrast, behavior encompasses the observable actions, routines, and verbal or non-verbal expressions that constitute the delivery of service.



The choice to shape mindset or behaviors first depends on context, readiness, and the goals of the experience strategy.

Start with Mindset When:

- You're building long-term culture.
- Team is experienced but emotionally flat.
- Roles require high empathy.

Start with Signature Behaviors When:

- You need fast, visible service improvement.
- Staff are new or inconsistent.
- You want measurable, trainable actions.

Best Practice: Start with behaviors to scaffold, then develop mindset to sustain.

Mindset First or Signature Behavior First? The Strategic Lesson

A guest may come for a drink-but they return for a feeling. A moment. A sense that they were seen, not just served.

Client expectations go beyond correctness. They want emotional lift and sensory engagement. To meet this, service professionals need more than skill-they need intent, and a structure that helps them show up fully. The cocktail isn't just the product. The moment is.

Bartender 1 (the one who made me the cocktail) reflects a mindset-first approach-but the mindset hasn't been shaped or activated. He performs flawlessly on the functional level but misses relational and sensorial cues, not from defiance, but likely from a lack of structure and intent.

This reveals the trap of a mindset-first strategy in isolation: without explicit guidance, clarity, or modeling, professionals may think they're doing enough, even when emotional presence is absent.

Signature behaviors act as anticipatory cues and behavioral scaffolding. They normalize engagement, give professionals safe and repeatable ways to show up, and create emotional lift that benefits both the client and the server.

The lesson? Begin with behaviors when presence is missing. Build mindset when presence is routine but lacks heart. In high-touch environments, combine both. Signature behaviors set the floor. Mindset defines the ceiling.

Supporting Research & References

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About Oktave

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We support you in transforming your sales ceremony into a meaningful, branded, and relational selling experience—guided by our cutting edge Selling Experience Signatures design process and activated through bespoke training programs and coaching initiatives for both frontline teams and managers.

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