Course Overview Summary

Partner/Program Name:	CBTS L&D/CX Training Program	**Format:** *(Synchronous or Asynchronous)*	Asynchronous
Course/Workshop Title:	CBTS | OnX Customer Experience Foundations Course	**Audience:**	All CBTS | OnX employees
Type: *(Workshop or eLearning)*	eLearning	**Level:** (1, 2, 3 or 4)	1 – Foundational
Learning Designer & Developer	Adriana Salinas	**SME(s)**	Vanessa Seiter Andrew Miller
Course Description: How to	Customers are the lifeblood of a company. Customers equal revenue because they are the ones who pay you for the work you perform. To best serve our customers, you must understand where your role fits into the customer journey and how a customer-first mindset can impact the customer's journey. In this asynchronous eLearning course, you will understand the core values of a customer-first mindset and practice applying these values through scenario-based learning activities. By the end of this training, you will be able to identify the customer-first mindset that positively and negatively contributes to the customer experience. You will also understand how to participate in the customer-first program.		
Learning Outcomes:	- Define the customer experience and understand the customer journey - Understanding how each employee contributes throughout the customer's journey - Recognize and understand the attributes of what customer-first mindset is and how it impacts the customer experience - Understand how to engage and participate in the customer-first program		

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Links to Project Resources

Transcribed Script	Original Storyline Design	Storyboard (Word doc)	Storyline (Review Link)	Action Map

Backward Design Plan

Course Asset List

Learning Sequence #	Asset Name/Description and Storyboard *(if applicable)*	Quantity	Asset Type/Format (link to any draft materials if helpful)	Status · Created - final · Created- draft · In progress · Not created	Being created by:
1	Customer Journey graphic	1	• PowerPoint link	**Created final**	Andrew Miller
3	Scenario 1-3	2	• Storyboard (Word doc) • Review link	**Created Final**	Adriana Salinas
4	How to give a badge	1	• Review link	**Created Final**	Adriana Salinas
3	Customer-First Mindset Must Haves	1	• Canva Link	**Created Final**	Adriana Salinas

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Outline

Introduction - Video from Jeff (**VS to get script over to Jeff: Andrew to edits)**

- Introduce the Revised Learning Objectives
    - Define the customer experience and understand the customer journey (taught by Jeff in the Intro)
    - Understand that all employees must obtain a Customer-First Mindset (Section 1)
    - Identify how a customer-first mindset impacts the customer experience (Section 2)
    - Understand how to participate in the customer-first program (Section 3)
- **Explain the Customer Journey Map (VS: To provide updated Town Hall visual/definitions)- Replace current stair steps visual**
- Explain the customer journey and why it's important-

Section One: Understand a customer-first mindset

- Define a customer-first mindset (what)
    - *At CBTS | OnX Canada, it's critical that every employee adopt a Customer-First Mindset during any stage of the customer journey you may impact in your day-to-day responsibilities. Having a customer-first mindset simply means that the customer's needs are being considered before all else.*
- Explain the importance of a customer-first mindset (why)
    - *Customer satisfaction leads to stronger loyalty and advocacy from our customers. Ensuring quality customer satisfaction begins with every employee at CBTS | OnX Canada putting a customer-first mindset into practice.*
        - A customer-first mindset must be obtained by every employee at CBTS | OnX because it can positively or negatively impact the **customer** experience
        - A customer-first mindset must be obtained by every employee at CBTS | OnX because it can positively or negatively impact the business
- A customer-first mindset can be obtained by exhibiting the 7 -themes (how)
    - *There are many ways in which we can provide excellent customer service. However, we have identified seven key disciplines that positively impact our customer interactions. These seven disciplines/traits provide a common theme when it comes to ensuring we are employing a customer-first mindset with any customer, whether internal or external:*
    - Flexibility
    - Meeting deliverables
    - Expertise
    - Communication/responsiveness
    - Sense of urgency
    - Proactiveness
    - Partnership

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- *Take a moment to review these disciplines/traits. Consider whether or not you are touching on at least one of these traits any time you're having a conversation with a customer.*

Section Two: Identify how a customer-first mindset impacts the customer journey (Articulate Storyline)
- Scenario 1: Create a scenario where the customer and employee are interacting and having dialogue with each other. Base the employee's dialogue and actions around the five values they possess and two values they don't possess. The customer journey is occurring while the employee(s) exhibit a mostly (5/7) customer-first mindset. (3 "small-choices" as check for understanding of the positive mindset)
- Scenario 2: Create a scenario where the customer and employee are interacting and having dialogue with each other. Base the employee's dialogue and actions around the five values they don't possess and the two values they do possess. The customer journey is occurring while the employee(s) don't exhibit (2/7) a customer-first mindset. (3 "small-choices" as check for understanding of the negative mindset)
- Scenario 3: (Final assessment) Create a scenario where the customer and employee are interacting and having dialogue with each other. Base the employee's dialogue and actions around the seven values they possess (7/7 exemplar example). The customer journey is occurring while the employee(s) exhibit an exemplary customer-first mindset. (five "small-choices" as check for understanding of an exemplary customer-first mindset)

Section Three: Understand how to participate in the customer-first program
- Overview of the customer-first program - VS Pull from the CF guidelines (2023)
- Steps for awarding and recognizing (see Andrew's how to video- may need to update with Unily)

Conclusion
- Review the Journey Map and highlight the asset resource link
- Review the importance of a customer-first mindset and how it impacts the customer journey
- Review the steps for awarding someone a customer-first badge and highlight the asset resource link

Learning Materials	• Laptop/computer • Customer Journey Map Asset
Knowledge Check	(Final assessment) Create a scenario where the customer and employee are interacting and having dialogue with each other. Base the employee's dialogue and actions around the seven values they possess (7/7 exemplar example). The customer journey is occurring while the employee(s) exhibit an exemplary customer-first mindset. (five "small-choices" as a check for understanding of an exemplary customer-first mindset.

Course Overview

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CBTS | OnX Customer Experience Foundations Course (V2)

Note to Developers: This section will fall on the landing page of the Rise file **List the lesson titles of the course.**	**Learning Sequence** 1. **Introduction to The Customer Journey** 2. **What is a Customer-First Mindset?** 3. **How does the Customer-First Mindset Impact the Customer Journey?** 4. **What is the Customer-First Program?** 5. **Course Summary**	**Assets** ● See asset list
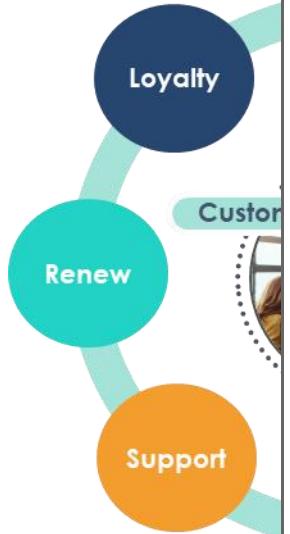
Learning Sequence

1. Introduction to the Customer Journey		

Block Type *(possible)*
Rise or template
	Content
	Introduction
	● Introduce the Revised Learning Objectives
	   ● Define the customer experience and understand the customer journey (taught by Jeff in the Intro)
	   ● Understand that all employees must obtain a Customer-First Mindset (Section 1)
	   ● Identify how a customer-first mindset impacts the customer experience (Section 2)
	   ● Understand how to participate in the customer-first program (Section 3)
	● Explain the Customer Journey Map
	   ● Awareness
	   ● Evaluate
	   ● Purchase
	   ● Readiness
	   ● Onboard/Implement
	   ● Support
		Assets
		● See asset list

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	• Renew • Loyalty • Explain the customer journey and why it's important	
Paragraph with heading	**Course Overview** Customers are the lifeblood of a company. Customers equal revenue because they are the ones who pay you for the work you perform. To best serve our customers, you must understand where your role fits into the customer journey and how a customer-first mindset can impact the customer's journey. In this asynchronous eLearning course, you will understand the core values of a customer-first mindset and practice applying these values through scenario-based learning activities. By the end of this training, you will be able to identify the customer-first mindset that positively and negatively contributes to the customer experience. You will also understand how to participate in the customer-first program.	
Paragraph with subheading	**Learning Objectives** Welcome to the Customer Experience Foundations Course for CBTS	OnX Canada. In this course, you will be introduced to the foundational concepts of the Customer Experience program. By the end of this course, you will be able to: - Define the customer experience and understand the customer's journey - Understand that all employees must obtain a Customer-First Mindset - Recognize and understand how a customer-first mindset impacts customer's experience - Understand how to participate in the customer-first program	
Divider Block	Continue	
Quote on Image or Statement B	Welcome to the Customer Experience Foundations course. In this course you will learn the basics of delivering exceptional customer service and creating loyal customers. We will	

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	explore the different stages of the customer journey, from awareness to advocacy, and how you can impact each stage positively, regardless of your role in the organization. You will also learn about the Customer First awards program, which recognizes and rewards employees who demonstrate a customer-first mindset among your peers, leadership, and customers. By adopting a customer-first mindset, you can make a significant impact on the customer's journey. At the end of this course, you will gain the skills and knowledge to enhance the customer experience and contribute to the success of our organization.	
Continue	Continue	

Image and text	A customer journey is the process a customer goes through when interacting with our business. It includes all the touchpoints and interactions a customer has with the business, from their very first encounter with our brand, all the way through to post-purchase. Understanding the customer journey is essential in planning your customer service and marketing strategies. It helps us to identify the friction points of our customers and focus on improving their experience. By analyzing the customer journey, we can identify areas where we can improve our service and provide better value for our customers. This will lead to increased customer satisfaction, loyalty, and ultimately increased revenue.	Loyalty Custor Renew Support
Interactive Block - Timeline	**Awareness:** This is the very first stage where a customer becomes aware of our brand and the products and/or solutions CBTS I OnX offers. - This is typically done by web searches, blog posts, social media posts, marketing events, webinars, account representatives, employee ambassadors, or any other means that may commercialize our brand to our external customers. **Evaluate**: In the Evaluate stage a customer begins to actively consider, try out, and ultimately make a decision on whether the CBTS I OnX products and/or services meet the needs of their business/organization. - This can be done by demonstration, trial, or proof of concept of the product /or solution they are interested in. Any artifact that is provided to a customer that assists in a customer's decision to purchase should be considered in this stage.	

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- Items to take into consideration would include solution design documents, network designs, Request for Proposal or Request for Information documents, Statement of Work, and Bill of Materials. Additionally, this is the stage where customers begin to compare CBTS I OnX against our competitors. They may do this by utilizing case studies, blogs, or white papers on these products or services.

Purchase: During this stage, a customer decides to move forward with the purchase of a product and/or solution.
- The actions that take place during this stage could be a customer initiating a Master Service Agreement, negotiation of pricing or terms and conditions, customer purchase orders, execution of a State of Work, Right to engage documents or sales quotes

Readiness: During this important stage, CBTS I OnX prepares the customer for the product, solution, or services they have committed to purchase.
- This includes customer "readiness" before deployment, setting customer expectations, and mutually agreeing on roles and responsibilities. Additional areas to consider in this stage would be customer product delivery dates and ship-to locations, project management kick-off meetings, implementation and timelines, customer on-site authorizations and access, billing commencement, and expectations.

Onboarding/Implement: This stage is all about transition. The customer will begin recognizing the value of the acquired products or services, meeting the goals and objectives of the initial purchase by the end of this stage.
- This could reflect the successful delivery of products and implementation of services and solutions. Activities could include onboarding and configuration of devices and infrastructure, customer training, as well as full engagement from onsite resources.

Support: In this stage, the customer moves from a new customer to an existing customer and relies on CBTS I OnX in a support mode.

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	• Support includes day-to-day account management, service desk support, change management, incident management, invoice, and billing support **Renew:** In the Renew stage the customer becomes confident with our products and services through regular usage and value gained over time. • The use of the product or services becomes second nature, to the point that they couldn't imagine doing it another way and it would be painful to lose the product or service, therefore resulting in a renewal of services. • Additionally, through this brand confidence, the customer adds additional products or services across the CBTS I Onx product portfolio. **Loyalty:** The customer becomes an advocate and defender of CBTS I OnX, referring the company, product, and/or services to others. • This could also include creating and sharing content about the company, and aiding other customers on webinars and marketing events while sharing their positive experiences on public forums. Loyal customer becomes advocates of our brand and drives organic growth across all products. • It is not uncommon for customers to participate in case studies or verbatims and consider CBTS I OnX trusted advisors.	
Knowledge Check - Matching Activity	- **Awareness:** This is the stage where a customer becomes aware of our brand and the products and/or solutions CBTS I OnX offers. - **Evaluate:** This is the state where a customer begins to actively consider, try out, and ultimately make a decision on whether the CBTS I OnX products and/or services meet the needs of their business/organization. - **Purchase:** This is the stage where a customer decides to move forward with the purchase of a product and/or solution. - **Readiness:** This is the stage where a CBTS I OnX prepares the new customer for the product, solution, or services they have committed to purchase.	

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	- **Onboarding/Implement**: This is the transition stage where a new customer will begin recognizing the value of the acquired products or services, meeting the goals and objectives of the initial purchase by the end of this stage. - **Support**: This is the stage where the customer transitions from a 'new' customer to an 'existing' customer and relies on CBTS I OnX in a support mode. - **Renew:** This is the stage where a customer becomes confident with our products and services through regular usage and value gained over time. - **Loyalty:** This is the stage where the existing customer becomes an advocate and defender of CBTS I OnX, referring the company, product, and/or services to others.	
Divider block	Continue	

Learning Sequence
*Make copies of the table below for each lesson/section of the course.

2. What is a customer-first mindset?		

Block Type *(possible)*
Rise or template
	Content
	Section One: Understand a customer-first mindset
	• Define a customer first-mindset (what)
	• Explain the importance of a customer-first mindset (why)
	   • A customer-first mindset must be obtained by every employee at CBTS | OnX because it can positively or negatively impact the customer experience
	   • A customer-first mindset must be obtained by every employee at CBTS | OnX because it can positively or negatively impact the business
	• A customer-first mindset can be obtained by exhibiting the 7 values (how)
	   • Flexibility
	   • Meeting deliverables
	   • Expertise
		Assets
		• See asset list

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	• Communication/responsiveness • Sense of urgency • Proactiveness • Partnership	
Statement C	Having a customer-first mindset simply means that the customer's needs are being considered before all else.	
Paragraph with subheading	**Obtaining a Customer-first mindset** A customer-first mindset must be obtained by every employee at CBTS | OnX because it can positively or negatively impact the **customer experience.** It's important to distinguish between the customer journey presented in the previous section, which is through the point of view of the customer, and the customer-first mindset, which is through the perspective of the employee, you! At CBTS | OnX Canada, it's critical that every employee adopt a Customer-First Mindset during **any stage** of the customer journey that may impact their day-to-day responsibilities. Customer satisfaction leads to stronger loyalty and advocacy from our customers. Ensuring quality customer satisfaction begins with every employee at CBTS | OnX Canada putting a customer-first mindset into practice.	
Paragraph / Labeled Graphic	There are many ways in which we can provide excellent customer service whether your role is internal or external. For your learning, we have identified seven key disciplines that positively impact our customer interactions. These seven disciplines, or traits you should adopt, provide a common theme when it comes to ensuring we are employing a customer-first mindset with any customer: • Flexibility • Meeting deliverables • Expertise • Communication/responsiveness • Sense of urgency • Proactiveness • Partnership	

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	Take a moment to review these disciplines/traits. Consider whether or not you are exhibiting on at least one of these traits any time you're having a conversation with a customer.	
Divider Block	Continue	
Heading	**Knowledge Check**	
Knowledge Check – fill in the blank	A customer-first mindset must be obtained by every employee at CBTS	OnX because it can positively or negatively impact the <u>customer experience.</u>	
KC – True/False	Having a customer-first mindset simply means that the customer's needs are being considered before all else. – **True**	
KC – fill in the blank	Ensuring quality customer satisfaction begins with every employee at CBTS	OnX Canada putting a <u>customer-first mindset</u> into practice.	
KC – Multiple Response	Which of the following is **NOT** a customer-first discipline/trait? • Flexibility • Meeting deliverables • Expertise • **Sense of entitlement** • Communication/responsiveness • Sense of urgency • **Extending deadlines** • Proactiveness • Partnership • **Poor communication**	
Divider	Continue	

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Learning Sequence
*Make copies of the table below for each lesson/section of the course.

3. How does the Customer-First Mindset Impact the Customer Journey?		
Block Type *(possible)* Rise or template	**Content** Section Two: Identify how a customer-first mindset impacts the customer journey (Articulate Storyline)	**Assets** ● See asset list
Storyline	Storyboard here	

Learning Sequence
*Make copies of the table below for each lesson/section of the course.

4. What is the Customer First Program?		
Block Type *(possible)* Rise or template	**Content** Section Three: Understand how to participate in the customer-first program 1. Overview of the customer-first program 2. Customer First leaderboard 3. Steps for awarding and recognizing	**Assets** ● See asset list
Heading with paragraph	**Overview** The Customer First Program is a recognition program designed to incentivize and recognize CBTS I OnX Canada employees for their exceptional commitment to delivering an outstanding customer experience. By aligning employee awards with the Customer Experience's guiding principles of responsive, reliable, convenient, and relevant, this program aims to support a customer-centric culture within the company and foster long-term customer loyalty.	
Heading with numbered list	The program is centered on 4 key areas:	

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	• **Inclusive Recognition**: The program encourages all employees regardless of their position or location within the organization to actively participate. • **Holistic Customer Focus**: Promotes a holistic customer focus across the organization by acknowledging and rewarding employees who consistently prioritize customer satisfaction. • **Diverse Recognition Categories**: Provides a wide range of customer-oriented recognitions to ensure that employees from different roles and departments can participate and be recognized for their unique contributions. • **Ongoing Engagement and Rewards:** The program aims to foster ongoing engagement and motivation among employees. It provides regular opportunities for employees to showcase their customer-centric mindset.	
Subheading with paragraph	**Customer First Participation** All CBTS I OnX Canada employees are entitled to participate in the Customer First Program. Based on your title, there may be restrictions on payouts. Please see the payout section for a list of restrictions. To receive incentives as part of the Customer First Program, you must be an active employee during the payout month. All payouts will be processed via the CBTS, OnX Canada, and India payroll processes and aligned with the payroll cycle for each country.	
Subheading with paragraph	**Recognition Badges** Employees can award badges based on their titles and interactions with their employees and peers. All badges awarded will appear on the employee's profile on the CBTS intranet, Connect. In addition, the awardee will receive an email notification indicating the recognition and the name of the person that was awarded.	
Paragraph	Daily badges awarded will be recognized on the CBTS I OnX Canada homepage on Connect. All points awarded will apply to monthly Customer First and Quarterly Circle of Excellence awards and badges awarded to employees will have a cumulative total and be visible on the CX Leaderboards on the Customer Experience homepage. Point	

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	accumulation will start over at the beginning of each calendar year.	
Subheading with paragraph	**Notifications and Leaderboards** Once a badge has been awarded to an employee:	
Interactive Block – Timeline or Process	A notification from Connect will be sent to the awarded employee via email.	
Interactive Block – Timeline or Process	A notification will also appear on Connect. The awardee can view notifications by clicking the "bell" icon next to the search bar on Connect.	
Interactive Block – Timeline or Process	The type of badge, who awarded the badge, and the reason given for awarding the badge will appear on the employee's profile along with associated points.	
Interactive Block – Timeline or Process	The awarded employee will also appear on Connect's Homepage on the Customer First Recognition carousel.	 **CUSTOMER FIRST RE** Thank you for all your h Employee's Name w Director/Manager to Empl

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Interactive Block – Timeline or Process	All Customer First badge recipients will be tracked on the Leaderboard, which is located on the Customer Experience Home Page. The Leaderboard will display the highest accumulated points by an employee as badges are awarded daily and will be leveraged to determine the Circle of Excellence winner each quarter.	
Storyline	Attach video Narration To award someone a customer-first badge first navigate to your profile on the top right of Connect Home Page and select Award Recognition	

	Type the name of the person you want to award a customer-first badge and check the box next to their name. Click Next. Choose the customer-first badge you want to award based on your role or title. Click next. Type an explanation for awarding them this badge. Click Submit.	
Note - Activity	Take a moment to award someone a customer-first badge on Connect.	
Divider block	Continue	

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