

## Customer Experience Scenario Storyboard

### Project Title: Customer Experience Training

Type: eLearning (Articulate Storyline)

Learning method: Scenario-based

#### Learning Objective:

- Identify how an employee who obtains a customer-first mindset impacts the customer experience journey

#### Resource: Customer-First Mindset Must-Haves:

- **Flexibility:** We adapt to new situations, changes, and challenges with ease. We know how to manage unexpected circumstances and attack each problem warmly and positively.
- **Proactiveness:** We anticipate, collaborate, and operate ourselves in a way that can positively impact the larger business. We create a positive experience by exceeding expectations of our future or existing customers.
- **Expertise:** We hire best-in-breed team members who not only hold credentials in the areas they work in but also demonstrate professionalism and a mindset to do their best and provide spectacular output in their areas of focus.
- **Communication:** We use multi-modal approaches to communication with diverse audiences and have the courage to go directly to the source of information needed.
- **Sense of Urgency:** We move fast, and act promptly each day with a commitment towards making something happen that's of critical importance.
- **Meeting Deliverables:** We don't just meet but exceed expectations by ensuring each business task is prioritized and accomplished in a timely manner to create a positive experience for our customers.
- **Partnership:** We work each day to build trust with our customers so they can achieve their goals. We maintain this trust by being honest and accountable for ourselves, our customers and overall business outcomes.

### Scene 1: Intro Scene

#### 1.1 Prompt Intro Slide

The Customer Journey

In partnership with Customer Experience & Learning and Development

#### 1.2 Prompt Intro Slide

CX Training: Customer-First Mindset

What's your name? Insert Reference Variable: UserName

What's your job title? Insert Reference Variable: UserTitle

Today you will:

- Successfully navigate the customer's journey by using a customer-first mindset.
- Understand how a customer-first mindset impacts the customer experience journey.

#### 1.3 Prompt Intro Slide

You recently completed your onboarding as a CBTS Account Manager. Your primary responsibilities include bringing awareness of the CBTS brand to new clients while ensuring

that they evaluate and purchase our product or services.

#### 1.4 Customer First Badges Slide

#### 1.5 Prompt Intro Slide

You must use a customer-first mindset to successfully bring on your first client. No pressure though! If at any point you don't make the right customer-first decision, your trainer Carlen will help you get back on track.

#### 1.6 Mentor Calen Slide

##### On-Screen

Text with image of Person 1

##### Programming notes

Jump to **1.4 Customer First Badges** when user selects **Continue** on slide 1.3

Jump to **1.6 Mentor Carlen Slide** when user selects **Continue** on slide 1.5

### Customer First Badges - Intro

#### 1.4 Prompt

Insert Reference Variable: UserName

Insert Reference Variable: UserTitle

Your mission today is to add three Customer-First Badges to your Profile.

##### On-Screen

Animation for earning a Customer First Badge

UserName

UserTitle

##### Programming notes

Jump to **1.5 Prompt Intro Slide** when use selects **Continue** on 1.4 Customer First Badge.

### Mentor Intro

#### 1.6 Prompt

Hey UserName, I'm Carlen. I'm your Customer Experience Trainer! I'll be here to help you navigate the customer journey and practice using a customer-first mindset. I also made you a downloadable resource that you can find on the top left of the screen under the Resource tab.

##### On-Screen

UserName

Text with image of Person (Trainer)

### Programming notes

Jump to **2. Scenario 1** when the user selects **Continue** button.

## Scene 2: Scenario 1 – Awareness

### Prompt

Marketing just sent you a new lead to follow up on. As a new Account Manager, you're excited about the opportunity and promptly email the customer. In your response, you request to set up a Discovery Call, attach both a one-page document and a link to a video about CBTS/OnX to communicate our offerings in multiple formats. Anticipating the need for a follow-up communication, you schedule a reminder in Outlook if the prospective customer hasn't responded in three days.

### On-Screen

Text with image.

**Awareness** Animation bottom corner

### Programming notes

Jump to **Question-Awareness** when the user selects **Continue** button.

## Question – Awareness

Aware Question: Which of the following Customer-First Mindsets are you, the Account Manager, exhibiting? Check all that apply.

**Choice A:** Communication

**Choice B :** Proactiveness

**Choice C:** Sense of Urgency

### On-Screen

Text with image.

**Awareness** Animation bottom corner

### Programming notes

If the user selects Choice A, B, and C, jump to **Mentor Response (Positive)** when the user selects the **Continue** button.

If the user doesn't select Choice A, B and C, jump to **Mentor Response (Negative)** when user selects **Continue** button

## Mentor Responses

**Carlen Response (Positive)**

Correct! Enthusiasm to communicate with a potential customer shows your sense of urgency, your proactiveness and responsiveness. These are all important customer-first mindset to have, especially during the Awareness stage of the Customer Journey.

**Carlen Response (Negative)**

During the Awareness stage, communication, proactiveness and sense of urgency are all imperative to show a customer-first mindset. By not showing enthusiasm to communicate, being proactive and showing a sense of urgency you could be missing out on an opportunity to acquire a new customer.

**On-Screen**

Text with image of Trainer

**Programming notes**

If **Mentor Response Positive**, jump to **Evaluate** slide when the user selects the **Continue** button.

If **Mentor Response Negative**, jump to **Evaluate** slide when the user selects the **Continue** button.

**Scenario 1.2  
Evaluate****Evaluate Prompt**

Great News! After your Discovery Call, the potential customer has decided to have another in-depth meeting to learn more about our solution offering. On this call, you invited a CBTS/OnX sales engineer to help answer additional questions. The sales engineer prepared a PowerPoint presentation in advance and educated you on the solution the customer is looking to purchase. The call lasted 1 hour, and the customer did not shy away from asking hard hitting questions but you and the engineer tag teamed answering, which made the customer feel at ease.

**On-Screen**

Text with image.

**Evaluate** Animation bottom corner

**Programming notes**

Jump to **Question-Evaluate** when the user selects **Continue** button.

**Question – Evaluate**

Eval Question: Which of the following Customer-First Mindsets is the **sales engineer** exhibiting?

Choice A (**correct**): Expertise

Choice B: Sense of Urgency

Choice C: Flexibility

### On-Screen

Text with image.

**Evaluate** Animation bottom corner

### Programming notes

If the user selects Choice A, jump to **Positive Mentor Response** when the user selects the **Continue** button.

If the user includes Choice B or C, jump to **Negative Mentor Response** when user selects **Continue** button

## Mentor Responses

### Mentor Response (positive)

Correct! It's imperative at this point in the Customer Journey to show expertise about the product or solution offering. By listening to the needs of the client and presenting to them our best-in-class solution, this is how we show what sets us apart from other service providers.

### Mentor Response (negative)

In fact, expertise is the primary customer-first mindset the sales engineer is exhibiting here. By listening to the needs of the clients and presenting to them our best-in-class solution, this is how we show what sets us apart from other service providers.

### On Screen

Text with Mentor Person

### Programming notes

Jump to **Scenario 1.3 - Purchase** slide when the user selects **Continue** button.

## Scenario 1.3 Purchase

### Prompt

Congratulations! After you and the sales engineer provide a quote to the prospective customer, they have decided to proceed with the solution offering. However, the price that was quoted will require approval by the Finance Department. Fortunately, Finance is aware of the pricing that was proposed and honors the agreed amount that is expected by both you and the customer.

### On-Screen

Text with image.

**Purchase** Animation bottom corner

### Programming notes

Jump to **Question - Purchase** when the user selects **Continue** button.

## Question Purchase

**Question:** Which of the following Customer-First Mindsets is Finance exhibiting?

**Choice A:** Proactiveness

**Choice B:** Sense of Urgency

**Choice C (correct):** Meeting Deliverables

### On-Screen

Text with image.

**Purchase** Animation bottom corner

### Programming notes

If the user selects Choice C, jump to **Positive Mentor Response** when the user selects the **Continue** button.

If the user selects Choice A or B, jump to **Negative Mentor Response** when user selects **Continue** button

## Mentor Responses

### Negative Mentor Response

Meeting Deliverables creates a positive customer experience. By not meeting the expectation that was set with the previously agreed upon pricing between you and finance, they decided not to purchase our solution.

### Positive Mentor Response

Meeting Deliverables creates a positive customer experience. By delivering the price that was proposed and expected between finance, you and the customer, we exhibited a customer-first mindset.

### Programming notes

**Negative Mentor Response:** Jump to **Customer-First Badge 1** slide when the user selects **Continue** button.

**Positive Mentor Response:** Jump to **Customer-First Badge 1** when the user selects **Continue** button

## Customer-First Certificate Animation - 1 badge

### Customer-First Badge Certificate

#### On-Screen

Animation for earning a Customer First Badge – 1

Name

Title

One badge earned animation

#### Programming notes

Jump to **Scenario 2** slide when the user selects **Continue** button.

## Scenario 2

#### Prompt

You are a seasoned Account Manager for CBTS | OnX Canada. Your primary responsibilities are to prepare the customer for the product, solution, or services they committed to purchasing.

In order to earn your second Customer First Badge, you need to navigate the next three parts of the Customer's Journey: Readiness, Onboard/Implement, and Support.

#### On-Screen

Text with image.

**Readiness, Onboarding, Support** Animation bottom corner

#### Programming notes

Jump **Scenario 2 – Readiness/Onboard** when the user selects **Continue** button.

## Scenario 2 Readiness / Onboard

#### Prompt

Your new customer has a two-day deadline to get this solution up and running. The **CBTS | OnX Canada** service delivery team set expectations with the customer during a Kickoff Call, along with identifying roles and responsibilities during the onboarding process.

#### On-Screen

Text with image.

**Readiness and Onboard/Implement** Animation bottom corner

### Programming notes

Jump **Question-Readiness/Onboard** when the user selects **Continue** button.

### Question – Readiness/Onboard

#### Question

Thinking about ‘Readiness,’ what do you do next?

- A. (incorrect) You work swiftly with the **Service Delivery** team but, due to other commitments, the dashboard didn’t get set up until three days later.
- B. (incorrect) You follow up with the **Service Delivery** team but expectations were not fully communicated to the appropriate teams. **You escalated the request, but** configurations and dashboards took one week to get fully set up.
- C. **(correct)** You work quickly with the **Service Delivery** team **and** everyone was in agreement on the implementation timeline. Necessary configurations and dashboards were setup **within the expected two-day window**.

#### On-Screen

Text with image.

**Readiness** Animation bottom corner

### Programming notes

If user selects **A** jump to **Layer Choice Answer A(Incorrect)**

If user selects **B** jump to **Layer Choice Answer B(Incorrect)**

If user selects **C** jump to **Slide Answer C (Correct)**

### Scenario Onboard/Implement & Support

#### Prompt

**Layer Choice 2.1A:** Your team didn’t manage the account effectively and were slow to onboard and implement the new system.

**Layer Choice 2.1B:** Your team wasn’t in agreement on the timeline and took longer than expected **to get the customer up and running**.

**Layer Choice 2.1C:** **You met the customer's expectations within two days! In addition, you successfully worked with the team to ensure the customer was established for Day 2 Support.**

#### On-Screen

Text with image.

**Readiness** Animation bottom corner

### Programming notes

When user clicks **Continue** jump to **Question – Readiness, Onboard, Support**

## Question– Readiness, Onboard, Support

**Question:** Which customer-first mindsets should you exhibit during the Readiness, Onboard/Implement and Support phase of the Customer Journey?

Check all that apply.

**Correct – Sense of Urgency, Communication, Responsiveness, Meeting Deliverables**

**Incorrect – Extending Deadlines**

### On-Screen

Text with image.

**Readiness and Onboard/Implement** Animation bottom corner

### Programming notes

If the user selects **all four** correct customer first mindsets, jump to **Positive Mentor Response** when the user selects the **Continue** button.

If the **user doesn't select all four** customer-first mindsets, jump to **Negative Mentor Response** when user selects **Continue** button

## Mentor Response

### Positive Mentor Response

During the Readiness, Onboard/Implement and Support **phases** of the **Customer Journey**, the team must deliver the service that was promised in a timely manner. The team should all agree on the roles and responsibilities of each person involved in the process so that there are no issues with meeting the customers' goals and objectives. Doing this successfully will build trust so the customer knows they can rely on us for support.

### Negative Mentor Response

During the Readiness, Onboard/Implement and Support phase of the customer journey, the team must deliver the service that was promised in a timely manner. The team should all agree on the roles and responsibilities of each person involved in the process so that there are no issues with meeting the customer's goals and objectives. Doing this successfully will build trust so the customer knows they can rely on us for support.

### Programming notes

Jump to **Customer-First Certificate - 2** slide when the user selects **Continue** button on the **Positive Mentor Slide**

Jump back to Scenario 2 slide when user selects **Try again** button on the **Negative Mentor Slide**

## Customer-First Certificate Animation - 2 badges

### Customer-First Badge Certificate

#### On-Screen

Animation for earning a Customer Second Badge –  
Name  
Title  
One badge earned animation

#### Programming notes

Jump to **Scenario 3** slide when the user selects **Continue** button.

## Scenario 3 – Renew & Loyalty

#### Prompt

You are the Account Manager of a client reaching the end of their two-year contract. It's your job to ensure they renew their contract and show that they are loyal to CBTS as a partner. As you go through this experience, choose the correct customer-first mindset to successfully renew an existing client.

After successfully navigating the Customer Journey (Renew & Loyalty) you will earn a Customer First Badge.

#### On-Screen

Text with image.  
**Renew and Loyalty** Animation bottom corner

#### Programming notes

Jump **Scenario 3.1** when the user selects **Continue** button.

## Scenario 3.1 – Renew

#### Prompt

**Layer 1:** Your customer is **in the first year** of a 2-year contract. **You** decide to schedule a business review with them to get ahead of any concerns and ensure they are achieving benefits from their services with CBTS | OnX. During the review, the customer mentions a few challenges they are having.

**Layer 2:** Because of their challenges, the customer may be interested in pivoting to another service provider when their contract ends. Being a trusted advisor for your customer, you offer a session with a technical resource from CBTS | OnX to assist with additional training.

### On-Screen

Text with image.

**Renew** Animation bottom corner

### Programming notes

Show **Layer 2** after when user selects **Continue** on **Layer 1**

When user selects **Continue** jump to **Question - Renew**

### Question – Renew

#### Question:

Based on this scenario, what customer-first mindset(s) are being demonstrated? Select all that apply.

- A. Proactiveness by meeting with the customer well ahead of contract expiration.
- B. Expertise by pulling in a technical resource to assist the customer with the technology
- C. Sense of **Urgency** by quickly addressing the customer's feedback.

### On-Screen

Text with image.

**Renew** Animation bottom corner

### Program notes

When user selects A, B and C, and **continue** jump to **Scenario 3.2 Loyalty**

If user doesn't select A, B, and C, jump to **Negative Mentor Response**

### Scenario 3.2 – Loyalty

#### Prompt

**Congratulations!** Your customer-first mindset paid off and the customer has decided to **renew their services** once their two-year contract is up.

Recognizing the benefits of our solution, the customer has agreed to share their experience with **Marketing** for a case study that can be shared on the CBTS | OnX website, LinkedIn, and more.

### On-Screen

Text with image of Person 2

### Programming notes

Jump to **Question 3.2** when the user selects **Continue** button.

### Question 3.2 – Loyalty

**Question:** Which of the following statements from the customer shows their loyalty the CBTS | OnX brand? (Check all that apply)

**Choice A: (correct)** “I’ve reached out to one of my former colleagues who seemed very interested in discussing a solution that CBTS | OnX has provided us. I’ll send you his contact information – he’ll be expecting your call!”

**Choice B (correct):** “We’d love to share our experience with CBTS | OnX. If your Marketing department reaches out to us, we can discuss options for providing a testimonial for one of your case studies.”

**Choice C: (incorrect)** “I’d like to discuss different options before our next renewal and will be consulting with your competitors to compare offerings in the meantime.”

### On-Screen

Text Only

### Programming notes

If the user selects Choice A and B, jump to **Customer First Badge** when the user selects the **Continue** button.

If the user selects Choice C, jump to **Mentor Scenario 3.2** when user selects **Continue** button

## Mentor Scenario 3.2

### Positive Mentor Response

Proactiveness, Sense of Urgency and Expertise are all mindsets we use to help renew contracts and maintain business partnerships. It’s essential that our customers become loyal advocates and defender of CBTS | OnX, by referring our products and/or services to others.

### Negative Mentor Response

Proactiveness, Sense of Urgency and Expertise are all mindsets we use to help renew contracts and maintain business partnerships. It’s essential that our customers become loyal advocates and defender of CBTS | OnX, by referring our products and/or services to others.

### Programming notes

Jump (back) to **Scenario 3** slide when the user selects **Try again** button on the **Negative Mentor Response** Slide

Jump to **Customer-First Badge Certificate – 3** when user selects **Continue** button on the **Positive Mentor Response** Slide

## Customer-First Certificate Animation - 3 badges

## Customer-First Badge Certificate

### On-Screen

Animation for earning a Customer Third Badge –  
Name  
Title  
One badge earned animation

### Programming notes

Jump to **Final Slide** when the user selects **Continue** button.

## Final Slide

## Customer-First Badge Certificate with Mentor

Please close this window to return to the Customer Experience Training.

### On-Screen

#### Happy Mentor

Animation for earning a Customer Third Badge –  
Name  
Title  
One badge earned animation

### Programming notes

Jump to **End** when the user selects **Continue** button.