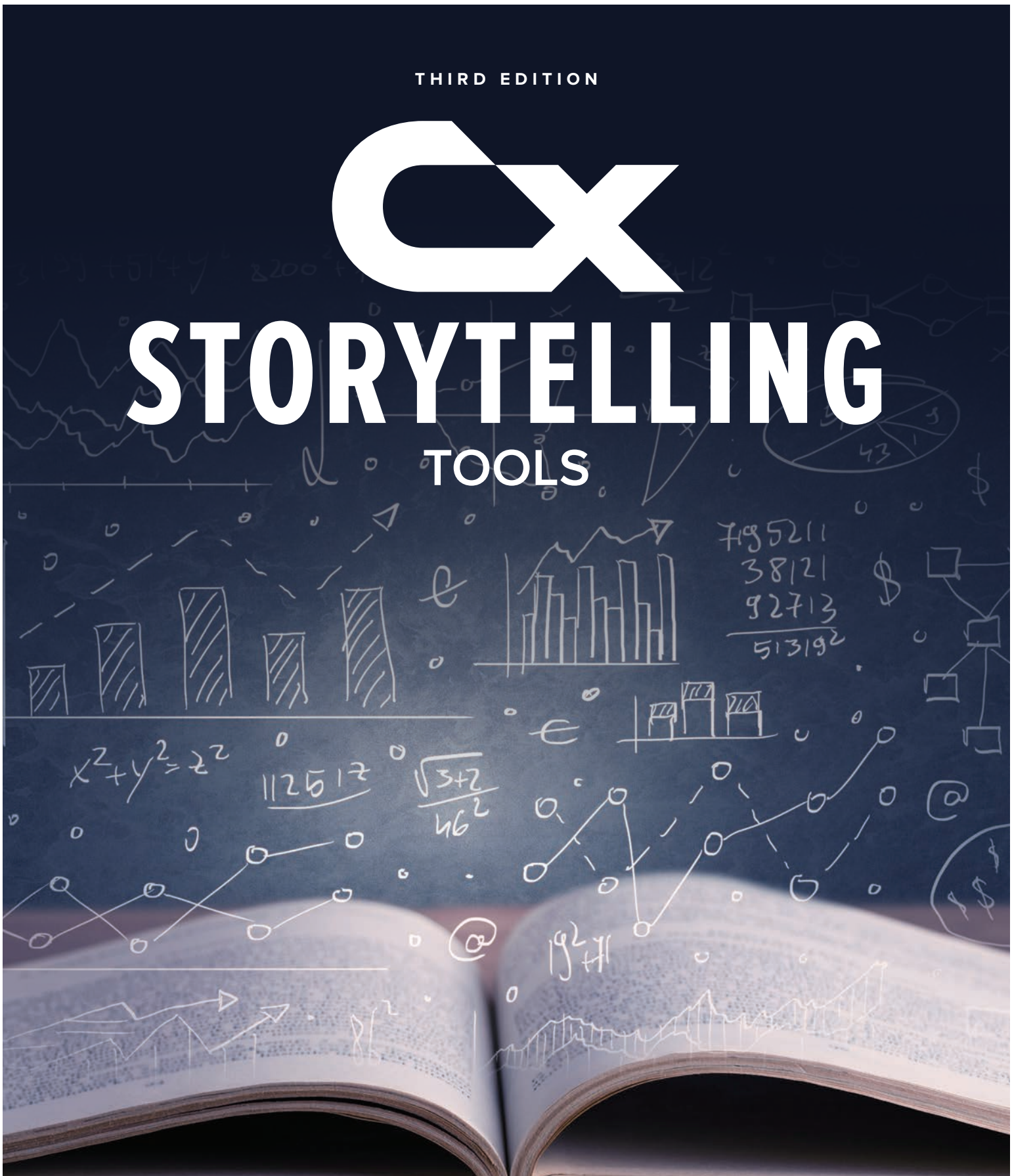


THIRD EDITION

CX

STORYTELLING TOOLS



WALKER

CONTENTS

Is storytelling listed in your job description? Probably not. And yet, it is a valuable skill to develop as CX professionals are often called upon to deliver presentations that tell the stories of their customers. This workbook was developed to provide a practical process and useful tools to help CX professionals deliver captivating presentations that drive customer-focused action.

The **CX Storytelling** workbook features the following exercises to help develop, deliver, and strengthen great presentations.

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Each exercise consists of an easy to use worksheet to help customer experience professionals be more thoughtful in the way they communicate with their colleagues. What's more, these worksheets not only help individuals prepare, but are also particularly useful in working with a group to align everyone's thoughts and ideas.

So much rides on the each presentation you deliver. You owe it to yourself (and your company) to carefully consider the most effective way to communicate.



AUDIENCE

WHAT IS THE PROFILE OF YOUR ATTENDEES?

To deliver a message that truly resonates with the audience it's essential to have a clear understanding of who will be present. Consider the following eight criteria and mark each spectrum to develop a solid profile of your attendees.

RANK
WHAT LEVELS OF AUTHORITY WILL BE IN THIS SESSION?

Entry-level employees ←————→ Executives, senior-level employees

FAMILIARITY
HOW WELL DO WE KNOW THE ATTENDEES?

We have never met the attendees ←————→ We know the attendees well

INTERACTION
HOW WELL DO THE ATTENDEES KNOW EACH OTHER?

The attendees don't know each other ←————→ The attendees know each other well

DESIRE
DO THE ATTENDEES WANT TO BE THERE?

The attendees do not want to attend, but are required ←————→ The attendees are willing and interested in attending



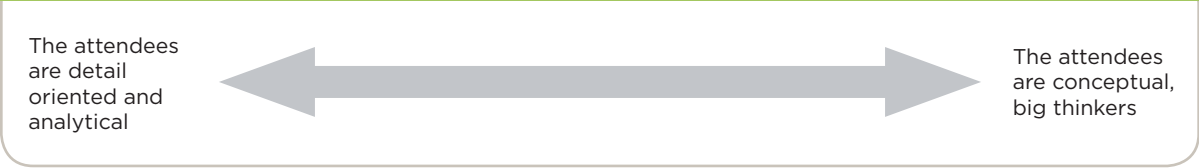
INFORMED
IS THE AUDIENCE FAMILIAR WITH THE TOPIC?



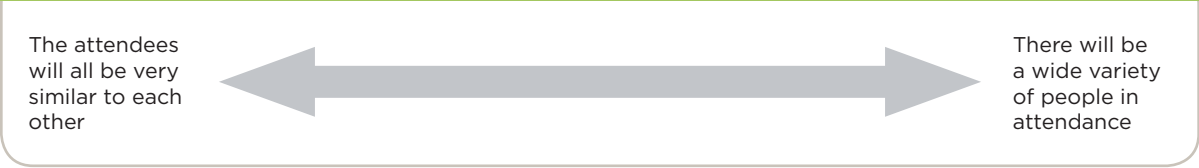
OPENNESS
HOW OPEN-MINDED WILL THE AUDIENCE BE?



PROCESSING
HOW DOES THIS AUDIENCE PROCESS INFORMATION?



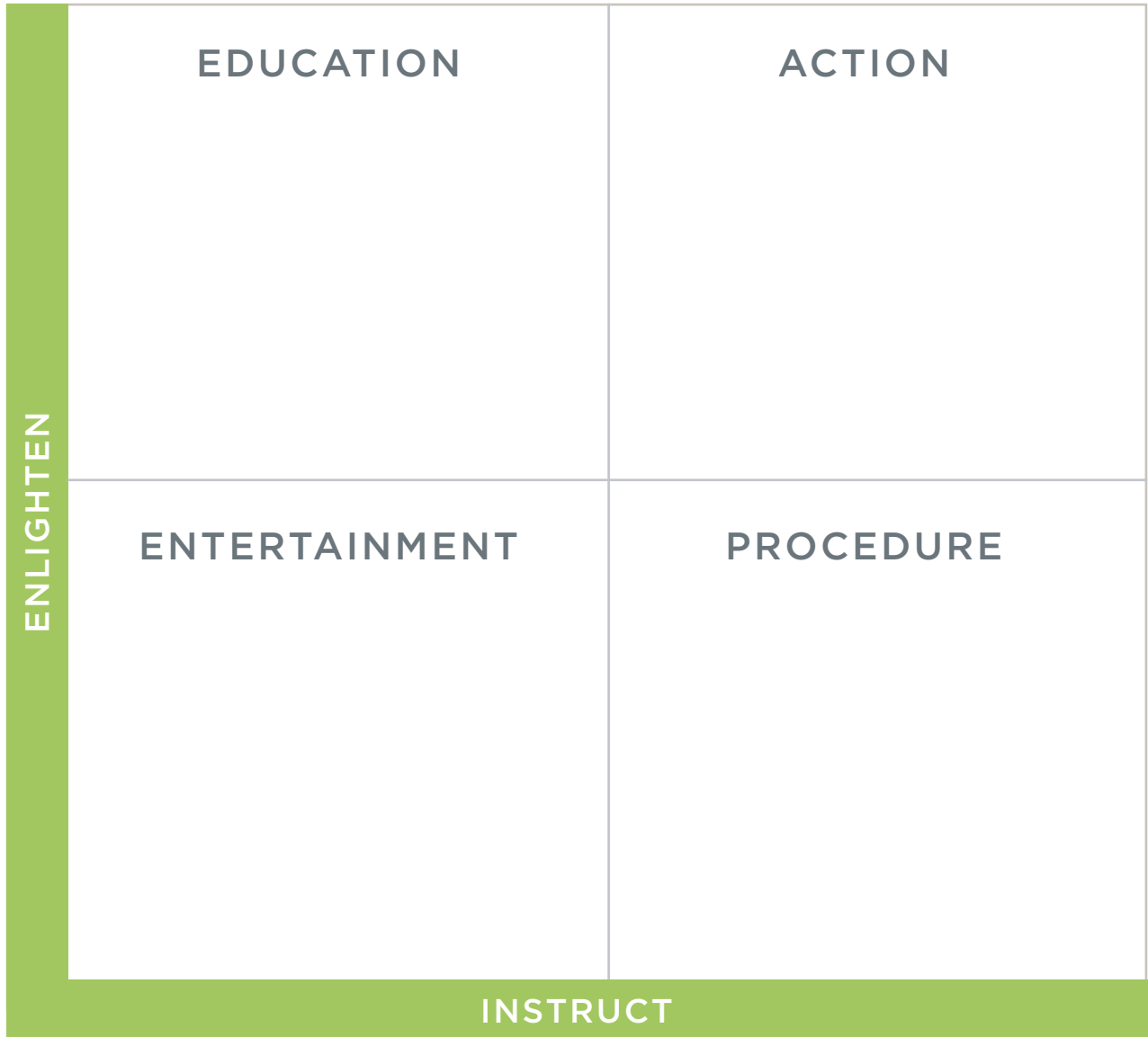
DIVERSITY
WHAT IS THE GENERAL MAKEUP OF THE AUDIENCE?



CONTEXT

WHAT TYPE OF PRESENTATION IS THIS?

Briefly consider the type of presentation you are delivering by marking the graphic below considering the degree of enlightenment and instruction that is intended.



TRANSFORMATIONS

WHAT TRANSFORMATIONS OF THOUGHT AND ACTION DO YOU WANT TO INSPIRE?

Think about your audience as they enter and leave your presentation. How should they change? How should they think differently? What should they do differently? Document the transformations below and reference this throughout the process of developing your presentation.

	FROM	TO
THINK <i>How should the audience transform in the way they think?</i>		



	FROM	TO
DO <i>How should the audience transform in what they do?</i>		

Source: Andrew Abela, *Advanced Presentations by Design* (San Francisco: Pfeiffer Wiley, 2008)



SUCCESS

WHAT WOULD BE EVIDENCE THAT YOU ACCOMPLISHED WHAT YOU WANTED?

For a moment, envision you have completed your presentation. What has transpired? What are cues or evidence that you successfully accomplished what you set out to do? Document these below.

	EVIDENCE OF SUCCESS
✓	
✓	
✓	
✓	
✓	
✓	
✓	
✓	
✓	
✓	



MESSAGES

WHAT ARE ALL THE MESSAGES YOU WOULD LIKE TO INCLUDE?

Think about everything you would like to say in your presentation? What are all the messages, big and small? Don't try to prioritize or put them in any sort of order. Just randomly write down everything you would like to communicate.

MESSAGES (RANDOM)				



PRIORITIES

HOW SHOULD YOU PRIORITIZE YOUR MESSAGES?

Now look at your random messages and consider what is most important. Put them in the categories below and keep in mind that many of your messages may end up getting cut.

MESSAGES (PRIORITIZED)	
BOULDERS <i>Essential messages that you must get across</i>	
ROCKS <i>Important messages to include</i>	
PEBBLES <i>Other messages that may or may not be necessary</i>	
SAND <i>Messages that could help with the overall flow</i>	
GEMS <i>Key highlights to enhance and energize</i>	



STORIES

WHERE DO YOU GET YOUR BEST CUSTOMER STORIES?

One of the best ways to engage employees is to share real stories of real customers. Such stories help them identify with what customers go through in doing business with your company. But where do we find these stories? Too often we rely on the easiest source, which is usually data from surveys. While useful, surveys don't typically provide the necessary emotional connection to inspire empathy from employees. As you develop your message, incorporate customer stories from rich sources that will generate an emotional connection from your audience.

RICH SOURCES FOR CUSTOMER STORIES

JOURNEY MAPPING

ONLINE PANELS

CUSTOMER COMMUNITIES

FOCUS GROUPS

CUSTOMER ADVISORY BOARDS

ETHNOGRAPHIC RESEARCH

SOCIAL MEDIA

QUALITATIVE INTERVIEWS

TEXT ANALYTICS

INPUT FROM CUSTOMER-FACING EMPLOYEES



COMPONENTS

WHAT ARE THE KEY ELEMENTS THAT MUST BE CONSIDERED FOR YOUR DELIVERY?

Think about all the components that will factor into the way you will effectively communicate. Check all the appropriate boxes and use this information to guide you on the best ways to structure your presentation and get your points across.

PRESENTATION AND MATERIALS	
<p>DELIVERY <i>How will you deliver this presentation?</i></p>	<input type="checkbox"/> This will be an in-person presentation <input type="checkbox"/> This will be an online presentation <input type="checkbox"/> This presentation will be provided for someone else to deliver <input type="checkbox"/> This will be a self-guided presentation <input type="checkbox"/> Other
<p>FORMAT <i>What is the anticipated format for this presentation?</i></p>	<input type="checkbox"/> This will be a lecture <input type="checkbox"/> This is an interactive workshop <input type="checkbox"/> This is a panel discussion <input type="checkbox"/> Other
<p>OCCURENCE <i>How often will this presentation be delivered?</i></p>	<input type="checkbox"/> This will be a one-time presentation <input type="checkbox"/> The same presentation will be presented multiple times <input type="checkbox"/> Various versions of this presentation will be delivered <input type="checkbox"/> This is one in a series of separate presentations <input type="checkbox"/> Other
<p>LENGTH <i>How long is the presentation scheduled to be?</i></p>	<input type="checkbox"/> Short - 20 minutes or less <input type="checkbox"/> Moderate - 30-60 minutes <input type="checkbox"/> Long - one to four hours <input type="checkbox"/> Extensive - full day <input type="checkbox"/> Other
<p>VENUE/SET UP <i>Where will the presentation be held and what is the ideal set up?</i></p>	Location _____ Set up: <input type="checkbox"/> Auditorium <input type="checkbox"/> Theatre <input type="checkbox"/> Classroom <input type="checkbox"/> Chevron <input type="checkbox"/> Semi-circle or circle <input type="checkbox"/> Rounds <input type="checkbox"/> Crescent rounds <input type="checkbox"/> U-Shape <input type="checkbox"/> Hollow square <input type="checkbox"/> Conference table <input type="checkbox"/> Other
<p>ADVANCE <i>Will activity take place prior to the presentation?</i></p>	<input type="checkbox"/> Material distributed in advance <input type="checkbox"/> Test or quiz in advance <input type="checkbox"/> Survey in advance <input type="checkbox"/> Object or gift in advance <input type="checkbox"/> Other



<p>VEHICLES <i>What delivery vehicles will be used in this presentation?</i></p>	<input type="checkbox"/> PowerPoint (4:3 or 16:9?) <input type="checkbox"/> Prezi <input type="checkbox"/> Video <input type="checkbox"/> Audio/music <input type="checkbox"/> Animation <input type="checkbox"/> WebEx <input type="checkbox"/> Diagrams	<input type="checkbox"/> Demonstration <input type="checkbox"/> Wall posters <input type="checkbox"/> Display boards <input type="checkbox"/> Handouts <input type="checkbox"/> Voting/polls <input type="checkbox"/> Props/displays <input type="checkbox"/> Special effects <input type="checkbox"/> Other
<p>INTERACTIVITY <i>What interactive elements are being planned</i></p>	<input type="checkbox"/> Discussion groups <input type="checkbox"/> Storytelling <input type="checkbox"/> Scenarios <input type="checkbox"/> Voting/polls <input type="checkbox"/> Skits	<input type="checkbox"/> Exercises <input type="checkbox"/> World Café <input type="checkbox"/> Brainstorming <input type="checkbox"/> Lists <input type="checkbox"/> Conference table <input type="checkbox"/> Other
<p>AUDIOVISUAL, OTHER SUPPLIES <i>What additional supplies will be needed?</i></p>	<input type="checkbox"/> Projector <input type="checkbox"/> Screen <input type="checkbox"/> Monitor <input type="checkbox"/> Laptop <input type="checkbox"/> Speakers <input type="checkbox"/> Special software <input type="checkbox"/> Special cords or adapters <input type="checkbox"/> Remote clicker, other tools	<input type="checkbox"/> Props/displays <input type="checkbox"/> Flipchart <input type="checkbox"/> Dry-erase board <input type="checkbox"/> Markers (fresh) <input type="checkbox"/> Exercise materials <input type="checkbox"/> Prizes/giveaways <input type="checkbox"/> Refreshments or meals <input type="checkbox"/> Other
<p>MATERIALS <i>What materials will be distributed?</i></p>	<input type="checkbox"/> Handouts <input type="checkbox"/> Workbooks	<input type="checkbox"/> Notepads <input type="checkbox"/> Hard copy surveys <input type="checkbox"/> Other
<p>WHAT ELSE? <i>Any other components to consider as you plan your presentation?</i></p>		



DELIVERY

HOW CAN YOU DELIVER YOUR MESSAGE IN A WAY THAT RESONATES WITH YOUR AUDIENCE?

Give considerable thought to how your message is delivered to ensure the audience is consistently engaged and you successfully communicate your message. Consider the following factors when you structure your presentation.

IDEAS TO IMPROVE DELIVERY	
ARRIVAL <i>What will be the first impression people have when they arrive at the meeting?</i>	<ul style="list-style-type: none">• Be deliberate about the room set up - what is the best set up for this situation?• Make sure the room is neat and ready with technology equipment set up and prepared to go.• Consider providing something at each person's place - small gift, paper and pen, etc.• Set up flipcharts or other items that will be used in the presentation. Set up an environment where they wonder and anticipate what will happen next.• Make an impression - set the room up in a way that makes it clear from the moment people arrive that this will be a well organized session.
LAUNCH <i>How will you begin the presentation?</i>	<ul style="list-style-type: none">• How will you begin the presentation to get things moving in the right direction from the start?• Avoid the "traditional" start - "Hi, my name is ..." or "Thanks for coming ..." or "Here's what we're going to cover today."• Launch into a story or exercise - something that will have more impact and get the audience engaged.
INTRODUCTION <i>How will you set expectations for the presentation?</i>	<ul style="list-style-type: none">• Once you have launched the presentation, step back and provide the more traditional opening remarks.• Introduce the session.• Let people know what will be covered.• Set expectations for their involvement and responsibilities.
BOULDERS <i>How will you emphasize the main points throughout the presentation?</i>	<ul style="list-style-type: none">• Consider how to get across your main points in the most powerful manners• Consider mentioning the main points early and often.• Consider discovery exercises to create something memorable.
TIMING <i>How much time is needed for each portion of your presentation?</i>	<ul style="list-style-type: none">• Chart out your presentation in logical time blocks.• Factor in time for discussion and questions.• Identify the visuals and materials needed at each stage of the presentation.



<p>TRANSITIONS <i>How will you move from topic to topic?</i></p>	<ul style="list-style-type: none"> • Consider a logical flow from one topic to the next, ensuring they are in the right order for the most impact. • Consider opening it for questions or discussion before moving to the next section of a presentation. • Consider a story, video, demonstration, or other feature as a way to make a smooth transition. • Consider taking a break.
<p>MIX <i>How will you keep the audience engaged?</i></p>	<ul style="list-style-type: none"> • Mix up the presentation techniques to prevent the audience from zoning out - try to make a deliberate shift in activity every 7 to 10 minutes. • Involve other speakers. • Create an exercise. • Open up discussion. • Change the format - move from PowerPoint to handout for instance. Plan for breaks at key junctures.
<p>CONCLUSION <i>How will you finish strong?</i></p>	<ul style="list-style-type: none"> • Try to end with a story or something to stress the key takeaways. • Review the final points. • Summarize action items and/or next steps.
<p>CHECK <i>How will you emphasize the main points throughout the presentation?</i></p>	<ul style="list-style-type: none"> • After all the planning to get the right flow, check it over to make sure you are ready. • Run it by others. • Rehearse. • Rehearse. • Rehearse!
<p>WHAT ELSE? <i>What other factors should be considered?</i></p>	



STRENGTHEN

BEFORE YOU DELIVER, THINK ABOUT HOW YOU WILL FOLLOW UP.

The presentation isn't really over once it's over. Actually, there is plenty of opportunity to strengthen your messages and increase the odds of success. Review the list below and check the ones to include as you plan your presentation.

	STRENGTHEN
<input type="checkbox"/>	EVALUATION: Send out an evaluation after the presentation. Focus less on how you performed and more on how effectively you met your objectives.
<input type="checkbox"/>	TEAM MEETING: Meet with your team - both internal and external - to discuss the impact of the presentation.
<input type="checkbox"/>	REPORT: Develop a report on the key initiatives that emerged from the meeting.
<input type="checkbox"/>	HOLDBACKS: Consider holding back particular information or material that may be more effective to distribute after the presentation.
<input type="checkbox"/>	PROCEEDINGS: Publish and distribute a recap of the presentation.
<input type="checkbox"/>	ACTION ITEMS: Distribute a list of action items from the presentation. Include assignments and due dates.
<input type="checkbox"/>	COMMITMENTS: Follow up on any commitments made during the presentation to include requests for additional information or resources.



<input type="checkbox"/>	<p>TARGETED FOLLOW-UPS Meet with key individuals after the presentation to get feedback and/or secure their support.</p>
<input type="checkbox"/>	<p>PROOF: Seek and promote quick wins from action prompted by the meetings.</p>
<input type="checkbox"/>	<p>SHORTCOMINGS: As time advances after the meeting cite missed deadlines and/or process miscues based on commitments from the presentation.</p>
<input type="checkbox"/>	<p>TIMING/TOUCHPOINTS: Consider a schedule of activities to keep key points from the presentation top of mind.</p>
<input type="checkbox"/>	<p>RELEVANT INFORMATION: Distribute articles, white papers, reports and other relevant information that support or complement the points made in your presentation.</p>
<input type="checkbox"/>	<p>WHAT ELSE? What are other ideas you may have for strengthening your presentation?</p>



ABOUT WALKER

Walker is a customer experience consulting firm. We specialize in helping today's business-to-business companies build and maintain a competitive advantage by delivering an exceptional customer experience. Our team of senior consultants averages more than 20 years of experience and they deliver a wide range of services to meet and exceed our clients' objectives.

And it works – Walker clients outperform the market by more than six to one!

WALKER'S SOLUTIONS AND SERVICES

No two companies are alike, so we collaborate with each client to understand their business, focus on their objectives and deliver the right combination of services to accelerate their success. No consulting firm can match Walker's focus on customer experience and the broad range of solutions and services we deliver, which includes:

- Customer experience assessment programs, which result in execution-ready strategic roadmaps.
- Journey mapping services to document the customer touchpoints and focus on “moments of truth.”
- Design of customer “ideal experiences,” targeting problem areas and identifying opportunities for breakthroughs.
- Collection of customer insights, leveraging a wide range of methods to understand the perspective of the customer.
- Advanced analytics services to interpret customer intelligence and improve decision-making.
- A full range of technology services to manage customer data and integrate with clients' existing systems.
- Action planning and change management services to prompt transformation across the organization.
- Education and training services to engage employees and foster a customer-focused culture.

Learn more about Walker at walkerinfo.com.



THE CX LEADER PODCAST

HOSTED BY STEVE WALKER

The CX Leader Podcast with host Steve Walker provides weekly insights for business leaders to improve results by unlocking the potential of their customer experience. More than a discussion of CX topics, the podcast focuses on ways CX professionals can develop the right skills and ideas to be effective leaders in their organizations.



About the host

Steve Walker applies more than 30 years of CX experience to hosting The CX Leader Podcast. Steve is chairman and CEO of Walker, a CX advisory firm that has worked with many of the world's most influential businesses. His discussions with guests are enlightening, informative and insightful!

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