CX
STORYTELLING
TOOLS

⚡ WALKER
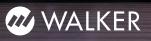
CX STORYTELLING TOOLS

Is storytelling listed in your job description? Probably not. And yet, it is a valuable skill to develop as CX leaders 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.

11 METHODS FOR POWERFUL PRESENTATIONS:

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 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?

CX leaders interact with a wide variety of employees when sharing information about customers. 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?

Entry-level employees   ○—○—○—○—○   Executives, senior-level employees

INFORMED
Is the audience familiar with this topic?

| The attendees are not at all knowledgeable about his topic | ◯ — ◯ — ◯ — ◯ — ◯ | The attendees are very knowledgeable about this topic |

OPENNESS
How open-minded will the audience be?

| The audience will be skeptical, defensive, and challenging | ◯ — ◯ — ◯ — ◯ — ◯ | The audience will be very open to the material |

PROCESSING
How does this audience process information?

| The attendees are detail oriented and analytical | ◯ — ◯ — ◯ — ◯ — ◯ | The attendees are conceptual, big thinkers |

DIVERSITY
What is the general makeup of the audience?

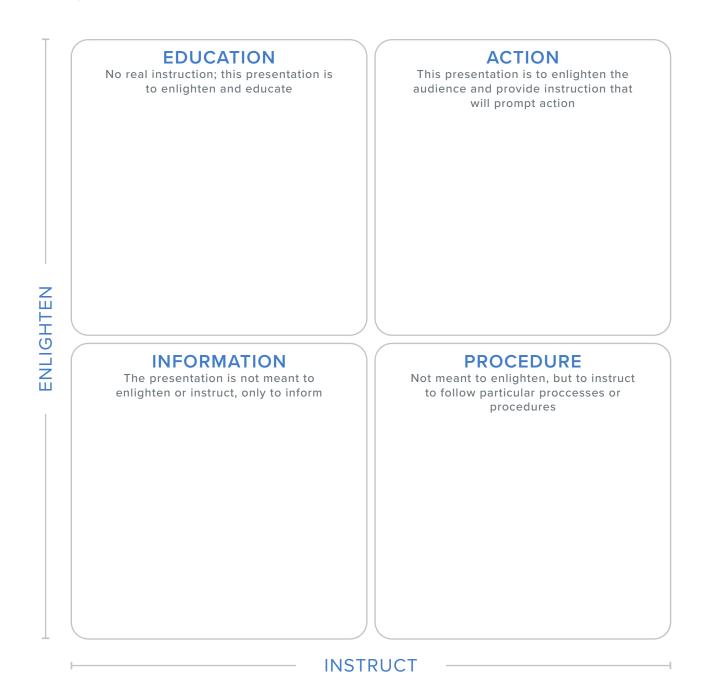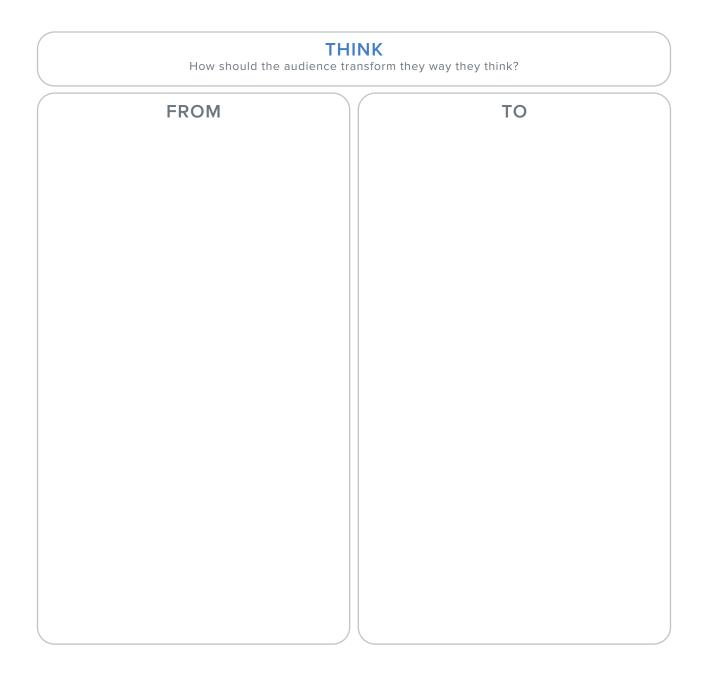| The attendees will all be very similar to each other | ◯ — ◯ — ◯ — ◯ — ◯ | There will be a wide variety of people in attendance |

CONTEXT

What type of presentation is this?

CX leaders are often tasked with prompting action that will improve experiences for customers. Briefly consider the type of presentation you are delivering by marking the graphic below considering the degree of enlightenment and instruction that is intended.

EDUCATION
No real instruction; this presentation is to enlighten and educate

ACTION
This presentation is to enlighten the audience and provide instruction that will prompt action

INFORMATION
The presentation is not meant to enlighten or instruct, only to inform

PROCEDURE
Not meant to enlighten, but to instruct to follow particular proccesses or procedures

ENLIGHTEN

INSTRUCT

WALKER

TRANSFORMATIONS

What tranformations of thought and action do you want to inspire?

CX leaders often need to serve as agents of change in their organizations. 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.

THINK
How should the audience transform they way they think?

FROM	TO

DO
How should the audience transform in what they do?
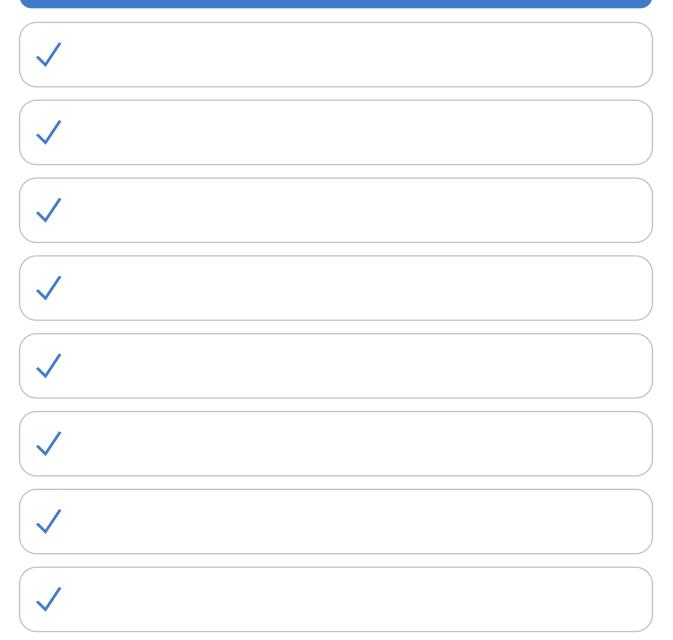
FROM

TO

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

SUCCESS

What would be evidence that you accomplished what you wanted?

Begin with the end in mind. Envision that 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 to create a vision for your presentation and the impact you want to achieve.

EVIDENCE OF SUCCESS

✓

✓

✓

✓

✓

✓

✓

✓

MESSAGES

What are all the messages you would like to include?

Typically, CX leaders have lots of data they can share. 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; we'll do that later. Just randomly write down everything you would like to communicate. Use the form below, sticky notes, or an online method to document everything you can think of. This can be done individually or as a group.

MESSAGES (RANDOM)			

PRIORITIES

How should you prioritize your messages?

CX presentations run the risk of providing too much information without communicating a clear message. It's easy to fall into this trap. After all, CX leaders have so much interesting customer data that we can be tempted to include all of it. Unfortunately, our audience may not find it as interesting as we do, and they may walk away without any clear direction.

Here's a tip: Think of your presentation as a bucket. Because a bucket has a limit to how much it can hold, you must carefully consider how much material you can fit in your bucket. Even more important, you need to consider the types of material to put into your bucket. You can fill it with 100 pebbles, but your key messages will likely get lost. Conversely, you can develop a more effective presentation by considering the right mix of material to cover as much as possible while ensuring your essential messages come through loud and clear. Think in terms of the materials below to construct a well-balanced, powerful presentation.

BOULDERS
Essential messages that you must get across

ROCKS
Important messages to include

PEBBLES
Other messages that may or may not be necessary

SAND
Messages that could help with the overall flow

GEMS
Key highlights, quotes, or stories to enhance and energize

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 RESEARCH

TEXT ANALYTICS

INPUT FROM CUSTOMER-FACING EMPLOYEES

ORDER

What is the best order to deliver your messages?

Now that you've prioritized your messages, consider how the presentation should unfold and how much time should be dedicated to each message. For now, list an initial, basic outline of the initial sequence of topics, then adjust as necessary when we consider delivery ideas.

PRESENTATION OUTLINE	
TIMING	**MESSAGES**

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

DELIVERY

How will you deliver this presentation?

- ☐ This will be an in-person presentation
- ☐ This will be an online presentation
- ☐ This presentation will be provided for someone else to deliver
- ☐ This will be a self-guided presentation
- ☐ Other

FORMAT

What is the anticipated format or structure for this presentation?

- ☐ This will be a lecture
- ☐ This is an interactive workshop
- ☐ This is a panel discussion
- ☐ Other

OCCURRENCE

How often will this presentation be delivered?

- ☐ This will be a one-time presentation
- ☐ The same presentation will be presented multiple times
- ☐ Various versions of this presentation will be delivered
- ☐ This is one in a series of separate presentations
- ☐ Other

LENGTH

How long is the presentation scheduled to be?

- ☐ Short – 20 minutes or less
- ☐ Moderate – 30-60 minutes
- ☐ Long – one to four hours
- ☐ Extensive – full day
- ☐ Other

VENUE/SET UP

If in person, where will the presentation be held and what is the ideal setup?

Set up:

- ☐ Auditorium
- ☐ Theatre
- ☐ Classroom
- ☐ Chevron
- ☐ Semi-circle or circle
- ☐ Rounds
- ☐ Crescent rounds
- ☐ U-Shape
- ☐ Hollow square
- ☐ Conference table
- ☐ Other

ADVANCE

Will activity take place prior to the presentation?

- ☐ Material distributed in advance
- ☐ Test or quiz in advance
- ☐ Survey in advance
- ☐ Object or gift in advance
- ☐ Other

VEHICLES

What delivery vehicles will be used in this presentation?

- ☐ PowerPoint
- ☐ Video
- ☐ Audio/music
- ☐ Animation
- ☐ Zoom/Teams
- ☐ Diagrams
- ☐ Demonstration
- ☐ Wall posters
- ☐ Display boards
- ☐ Handouts
- ☐ Voting/polls
- ☐ Props/displays
- ☐ Special effects
- ☐ Other

INTERACTIVITY

What interactive elements are being planned?

- ☐ Discussion groups
- ☐ Storytelling
- ☐ Scenarios
- ☐ Voting/polls
- ☐ Skits
- ☐ Exercises
- ☐ World Café
- ☐ Brainstorming
- ☐ Lists
- ☐ Conference table
- ☐ Other

AUDIOVISUAL, OTHER SUPPLIES

What additional supplies will be needed?

- ☐ Projector
- ☐ Screen
- ☐ Monitor
- ☐ Laptop
- ☐ Speakers
- ☐ Special software
- ☐ Special cords or adapters
- ☐ Remote clicker, other tools
- ☐ Props/displays
- ☐ Flipchart
- ☐ Dry-erase board
- ☐ Markers (fresh)
- ☐ Exercise materials
- ☐ Prizes/giveaways
- ☐ Refreshments or meals
- ☐ Other

MATERIALS

What materials will be distributed?

- ☐ Handouts
- ☐ Workbooks
- ☐ Notepads
- ☐ Hard copy surveys
- ☐ Pens/markers
- ☐ Other

WHAT ELSE?

Any other components to consider as you plan your presentation?

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 (ONSITE)

What will be the first impression people have when they arrive at the meeting?

- Be deliberate about the room set up – what is the best setup 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.

ARRIVAL (VIRTUAL)

What will be the first impression people have when they arrive online?

- Arrive early, well before your audience.
- Use an external microphone and make sure the sound is clear.
- Take the time to set up your video with good lighting and a clean background.
- Welcome guests as they arrive.
- Consider asking a question for attendees to answer in the chat. This can set the tone for more involvement and engagement.

LAUNCH

How will you begin the presentation?

- 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

How will you set expectations for the presentation?

- 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

How will you emphasize the main points throughout the presentation?

- Consider how to get across your main points in the most powerful manner.
- Consider mentioning the main points early and often.
- Consider discovery exercises to create something memorable.

TIMING

How will you move from topic to topic?

- 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.

TRANSITIONS

How much time is needed for each portion of your presentation?

- 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.

MIX

How will you keep the audience engaged?

- 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.

CONCLUSION

How will you finish strong?

- Try to end with a story or something to stress the key takeaways.
- Review the final points.
- Summarize action items and/or next steps.

CHECK

How will you emphasize the main points throughout the presentation?

- 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!

WHAT ELSE?

What other factors should be considered?

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

EVALUATION:

Send out an evaluation after the presentation. Focus less on how you performed and more on how effectively you met your objectives.

TEAM MEETING:

Meet with your team – both internal and external – to discuss the impact of the presentation and any next steps.

REPORT:

Develop a report on the key initiatives that emerged from the meeting.

HOLDBACKS:

Consider holding back particular information or material that may be more effective to distribute after the presentation.

PROCEEDINGS:

Publish and distribute a recap of the presentation.

ACTION ITEMS:

Distribute a list of action items from the presentation. Include assignments and due dates.

COMMITMENTS:

Follow up on any commitments made during the presentation to include requests for additional information or resources.

TARGETED FOLLOW-UPS:

Meet with key individuals after the presentation to get feedback and/or secure their support.

PROOF:

Seek and promote quick wins from action prompted by the meetings.

SHORTCOMINGS:

As time advances after the meeting, cite missed deadlines and/or process miscues based on commitments from the presentation.

TIMING/TOUCHPOINTS:

Consider a schedule of activities to keep key points from the presentation top of mind.

RELEVANT INFORMATION:

Distribute articles, white papers, reports, and other relevant information that support or complement the points made in your presentation.

WHAT ELSE?

What are other ideas you may have for strengthening your presentation?

ABOUT WALKER

Learn more at walkerinfo.com

Walker is an experience management (XM) services firm. Our experts provide a wide range of flexible solutions to maximize technology investments and support customer and employee experience initiatives for a wide range of organizations.

Our solutions span four general areas:

Customer Experience

Proven practices, and extensive experience serving hundreds of global brands

Digital Customer Experience

The digital options to deliver effective and efficient customer experiences

Employee Experience

Expert measurement and strategic consulting for best-in-class employee experiences

Patient Experience

A modern approach focused on patients, family members, and healthcare providers

THE CX LEADER PODCAST

cxleaderpodcast.com

The CX Leader Podcast 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.

The CX Leader Podcast explores a wide range of customer-focused business topics. Here are just a few:

- B2B versus B2C CX
- Luminaries of CX
- Intersections with CX
- The Influence of Technology
- CX Best Practices
- CX Users
- CX Horror Stories

- Change Management
- Journey Mapping
- Customer Listening Architecture
- Traits of Effective CX Leaders
- The Future of CX

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