# Customer Service Improvement 101

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| **Imagine the Story (this section will serve as a reference as you write the storyboard)** |
| **Who are we and what’s our goal?**  “Who we are” should match the intended audience for this learning experience, and our goal should mirror the goal that these people have in the real world.  Excellent Institute is an online language school that offers courses to customers worldwide. The company has observed a recent decline in the number of deals closed by their customer service representatives. It was found that the primary cause is that customer service representatives lack customer service skills. This problem can be solved through proper training.  The target audience for this training course is customer service representatives at Excellent Institute. The goal is to elevate customer service satisfaction levels, ultimately resulting in a targeted 20% increase in sales within the upcoming month.  **What’s the context or setting where someone must perform the actions?**  Where are we? Are we on a job site, in an office, or at our home? Include any necessary or relevant context.  The customer service representatives work remotely for the company, so they will carry out their customer service responsibilities at home. The customer service is performed through incoming messages or phone calls via social media platform Wechat.  **In which order will people perform the actions?**  Looking at your action map, which action will people need to perform first in this context? Order the actions as someone would need to perform them.   1. For inquiries from customers, customer service representatives gather pertinent information from customers and recommend courses tailored to customers’ specific needs. 2. When faced with customers displaying hesitation or reluctance, customer service representatives have follow-up interactions approximately a week later. 3. In instances of customer dissatisfaction or complaints, customer service representatives take the initiative to identify the underlying issues and strive to rectify the problems independently.   **Over which time period will people perform the actions?**  Will the actions take place on a single phone call? Over the course of an entire day? A week? A year?  The actions will take place over the course of a month.  **What is the happy conclusion if someone performs all of the actions correctly?**  Tell us what we would achieve if we were to make the correct choices. This should mirror what we would achieve in the real world.  Representatives assist the company in securing 20% more deals than last month, consequently earning a bonus for their contributions. |

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## Storyboarding Tips

1. Use dialogue directly from the characters in the story when you get opportunities to do so.
2. Use a conversational tone. If you can’t imagine someone saying it in the real world, then we shouldn’t include it in the storyboard.
3. Try not to include more than 1-3 sentences per slide.
4. Use short words and sentences.
5. Use the active voice. For example: say “he kicked the ball” instead of “the ball was kicked by him.”
6. Duplicate the slides in this template as needed; you can include multiple slides between questions, and you can include multiple slides for a single consequence if needed.
7. Show, don’t tell. Try to show us what happens by describing the scene and incorporating dialogue directly. Don’t tell us how people feel, show us what they do or say.
8. Avoid the coaching voice in your narrative. The mentor character should be the one giving us information and explaining the “why” behind things, and this should only happen when we reach out to them. Keep the rest of the storyboard to pure storytelling.

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## Storyboard Slide Template

The table below represents a slide in your project. You can copy and paste this (and replace any necessary elements) if you need additional slides in your storyboard.

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| **Slide Title** |
| **Type of slide (title slide, prompt, character prompt, question, consequence prompt, etc.)**  Write the content that you will include on the slide |
| **Visual notes**  Describe the visuals that you will include on the slide  **Programming notes**  Write the programming notes that explain how the interactive elements of the slide will function |

To copy the table, click-and-drag your cursor from the line beneath the table to the line above the table. Then you can press Control + C (or Command + C) to copy it. After that, place the cursor where you’d like to make a copy of the table in the document, then press Control + V (or Command + V).

## Complete your Storyboard Below

Complete your storyboard by replacing text as needed in the tables below.

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| **Title Slide** |
| **Title Slide**  Customer Service Training 101  Sales increasing challenges |
| **Visual notes**  A photo showing a smiling face of a customer representative.  **Programming notes**  Jump to Introduction slide when user selects Get Started button |

Use the following slides to introduce us to the scenario: explain who we are, where we are (if it’s necessary), and what our goal is. You can do this with narrative text or dialogue from a character in the story (see example storyboards for inspiration).

Each table is a new slide. Use as many as you need to introduce us to the situation (recommended 1-3 slides).

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| **introduction** |
| **Prompt**  You are a customer service representative at Excellent Institute. Today is your first day at this job. You are excited to start working. |
| **Visual notes**  A man with customer service headsets sitting at the desk in an office on the left. The prompt is on the right. Continue button is under the prompt.  **Programming notes**  Jump to Meet the Mentor slide when user selects Continue button. |

Have the mentor character introduce themselves with direct dialogue. Let us know who they are, and tell us that we can turn to them for help. (Alternatively, if you’re going to use a job aid instead of a mentor character, you can introduce the job aid here.)

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| **Meet the Mentor** |
| **Character Prompt**  Hi\_\_\_, I am Jenny, Welcome on board! I am the customer service manger. I have been working here for 6 years. Feel free to ask me any questions about your work.  Our sales need to be boosted. That why we have you here to help us to close more deals. Let’s get started! |
| **Visual notes**  Background is the same office. A woman image of the manager on the left. The character prompt on the right. Let’s Start button is under the prompt.  **Programming notes**  Jump to Customer 1 slide when user selects Let’s Start button. |

Lead us into the first question by explaining what happens before we need to make a decision (based off our action map). See example storyboards for inspiration.

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| **Question 1 - scenario** |
| **Prompt**  The system has a notification. Your first customer call comes in. Go ahead to respond. |
| **Visual notes**  Background is an desktop interface of a computer. A notification pops up at the bottom of the screen that says “incoming call” with a message sound. Then the prompt shows in the middle of the screen, with the background fading a little.  **Programming notes**  Jump to Customer 1-1 slide when user click on the Incoming Call. |

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| **Question 1 - scenario** |
| **Prompt** |
| **Visual notes**  The customer service representative image with a bubble “Hello, thank you for calling Excellent Institute, this is Lucy. How can I help you today?” on the right, and a female customer image with a bubble “Hello” on the right.  And then the words in the bubble changes to “I am looking for a course for my daughter to help her improve French language skills, could you recommend a course for her? ”  **Programming notes**  Jump to Question 1 slide when user selects Continue button. |

Ask the first question: ask us what we’d like to do in response to the situation that you just introduced us to.

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| **Question 1** |
| **Question**: How will you respond to the customer’s inquiry?  The correct answer choice should be based on one of the high-priority actions in the action map.  **Choice A (correct)**: Ask about her daughter’s information, including age, grade, region, level of French language skills, and courses taken before.  Include one or two incorrect answer choices based on the common mistakes that people make in this situation.  **Choice B**: Provide a general introduction of all the French courses, and let the customer to choose herself.  **Choice C**: And ask the customer which type of course is she looking for, such as writing, speaking, and reading courses. |
| **Visual notes**  Customer 1-1 slide as the fading background. The box of question and choices in the middle.  **Programming notes**  If user selects Choice A, jump to Question 1 - Choice A Consequence (Correct) slide  If user selects Choice B, jump to Question 1 - Choice B Consequence (Incorrect) slide  If user selects Choice C, jump to Question 1 - Choice C Consequence (Incorrect) slide  Display the text below when the user selects the mentor button.  Include the guidance that the mentor would say if they were selected. The guidance should hint towards the correct answer and (optionally) explain the “why” behind it. Maintain a conversational tone and try to keep it to 1-3 sentences.  **Mentor text**  Ask the customers questions to gather their pertinent information first, so that you can recommend courses to their needs! |

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| **Question 1 - Choice A Consequence (Correct)** |
| **Prompt**  When the user selects the correct answer choice, advance the story while hinting at why our answer was correct. Be sure to avoid the coaching voice. See storyboard examples for inspiration.  Advance the story here  The customer tells you about her daughter’s information, and you recommend a course that is appropriate for her level and learning needs. The customer is satisfied with your recommendation and decides to register for the course. |
| **Visual notes**  A happy face of the customer on the left and the prompt on the right. Continue button is under the prompt.  **Programming notes**  Jump to X slide when user selects Continue button. |

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| **Question 1 - Choice B Consequence (Incorrect)** |
| **Prompt**  When the user selects an incorrect answer choice, jump as far ahead in the story as needed to show the consequences of what would happen. You can use multiple slides to tell this story, but this branch should end in a “Try Again” button that brings people back to the question. Avoid the coaching voice…instead, tell us the story of the consequences.  Include consequence here  The customer becomes impatient and hopes to know your recommendations directly. |
| **Visual notes**  An unhappy face of the customer on the left and the prompt on the right. Try Again button in under the prompt.  **Programming notes**  Jump to Question 1 slide when user selects Try Again button. |

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| **Question 1 - Choice C Consequence (Incorrect)** |
| **Interviewer Prompt**  When the user selects an incorrect answer choice, jump as far ahead in the story as needed to show the consequences of what would happen. You can use multiple slides to tell this story, but this branch should end in a “Try Again” button that brings people back to the question. Avoid the coaching voice…instead, tell us the story of the consequences.  The customer is unsure about her daughter’ preference for the course and says she will ask her daughter and come back later.Then the customer never returns. |
| **Visual notes**  A confusing face of the customer on the left and the prompt on the right. Try Again button in under the prompt.  **Programming notes**  Jump to Question 1 slide when user selects Try Again button. |

Lead us into the next question by explaining what happens between the previous correct choice consequence and the next high-priority action that people would need to perform.

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| **Transition slide 1-2** |
| **Prompt**  Manager: Good job! Your first customer is satisfied with your service. Keep up the good work! |
| **Visual notes**  Image of manger with a happy face on the left and prompt on the right.  **Programming notes**  Jump to Question 2 slide when user selects Continue button. |

Ask the second question: ask us what we’d like to do in response to the situation.

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| **Question 2 - transition** |
| **Prompt**  After you recommend an appropriate course according to the customer’s need, and send the customer the payment link. But the customer hesitates about purchasing the course now, saying that she will talk with her daughter and contact you again. |
| **Visual notes**  A hesitating and thinking face on the left and prompt on the right. Continue button below the prompt  **Programming notes**  Jump to Question 2 slide when users click on Continue button. |

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| **Question 2** |
| **Question**: What will you do in that case?  Include one correct choice (based on the high-priority action in the action map) and one or two incorrect choices. Vary the position of the correct choice between questions.  **Choice A**: Ask probing questions to understand the specific reasons for their hesitation.  **Choice B (correct)**: Make a note of their inquiry and follow up at a later date.  **Choice C**: Offer detailed information about the service or product, including its benefits, features, and any special offers. Highlight how it can meet their needs or solve their problems. |
| **Visual notes**  Questions and choices in the middle.  **Programming notes**  If user selects Choice A, jump to Question 3 - Choice A Consequence (Incorrect) slide  If user selects Choice B, jump to Question 3 - Choice B Consequence (Correct) slide  If user selects Choice C, jump to Question 3 - Choice C Consequence (Incorrect) slide  Display the text below when the user selects the mentor button.  Include the guidance that the mentor would say if they were selected. The guidance should hint towards the correct answer and (optionally) explain the “why” behind it. Maintain a conversational tone and try to keep it to 1-3 sentences.  **Mentor text**  No rush. Customers need time to make decisions. Make a note of their contact information and inquiries and make sure to have follow-ups. |

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| **Question 2- Choice A Consequence (Incorrect)** |
| **Prompt**  When the user selects an incorrect answer choice, jump as far ahead in the story as needed to show the consequences of what would happen. You can use multiple slides to tell this story, but this branch should end in a “Try Again” button that brings people back to the question. Avoid the coaching voice…instead, tell us the story of the consequences.  The customer cannot answer with specific reasons. It’s a little awkward. She never calls again. |
| **Visual notes**  A questioning face of the customer on the left and prompt on the right. Try again button under the prompt.  **Programming notes**  Jump to Question 2 slide when user selects Try Again button. |

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| **Question 2 - Choice B Consequence (Correct)** |
| **Prompt**  When the user selects the correct answer choice, advance the story while hinting at why our answer was correct. Be sure to avoid the coaching voice. See storyboard examples for inspiration.  You follow up a week later with the customer. According to the notes you made in the previous call, you highlight how it can meet the customer’s needs. The customer decides to purchase the course this time. |
| **Visual notes**  A happy face of the customer on the left and prompt on the right. Continue button under the prompt.  **Programming notes**  Jump to Transition 2-3 slide when user selects Continue button. |

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| **Question 2 - Choice C Consequence (Incorrect)** |
| **Interviewer Prompt**  When the user selects an incorrect answer choice, jump as far ahead in the story as needed to show the consequences of what would happen. You can use multiple slides to tell this story, but this branch should end in a “Try Again” button that brings people back to the question. Avoid the coaching voice…instead, tell us the story of the consequences.  The customer gets impatient and says she is in a rush to go. So she hangs up. |
| **Visual notes**  A unhappy face of the customer on the left and prompt on the right. Continue button under the prompt.  **Programming notes**  Jump to Question 2 slide when user selects Try Again button. |

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| **Transition slide 2-3** |
| **Prompt**  Two weeks later, the customer contact you and complain that the courses are not good, and she requests a refund. |
| **Visual notes**  Image of manger with an irate image of the customer on the left and prompt on the right.  **Programming notes**  Jump to Question 2 slide when user selects Continue button. |

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| **Question 3** |
| **Question**: How will you respond to the customer?  Include one correct choice (based on the high-priority action in the action map) and one or two incorrect choices. Vary the position of the correct choice between questions.  **Choice A**: Tell the customer that you will talk to the manager first and get back to him.  **Choice B (correct)**: Ask about the reason that he asks for a refund and see if there is any remedy.  **Choice C**: Tell the customer it would be a great loss if she discontinues the course. Try to persuade him by showing what progress other students made after completing the course. |
| **Visual notes**  Customer 2-1 slide as the fading background. The box of question and choices in the middle.  **Programming notes**  If user selects Choice A, jump to Question 2 - Choice A Consequence (Incorrect) slide  If user selects Choice B, jump to Question 2 - Choice B Consequence (Correct) slide  If user selects Choice C, jump to Question 2 - Choice C Consequence (Incorrect) slide  Display the text below when the user selects the mentor button.  Include the guidance that the mentor would say if they were selected. The guidance should hint towards the correct answer and (optionally) explain the “why” behind it. Maintain a conversational tone and try to keep it to 1-3 sentences.  **Mentor text**  Try to solve the problem by yourself first before asking for help. Attempt to find the root cause and see what you can do. |

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| **Question 2 - Choice A Consequence (Incorrect)** |
| **Prompt**  When the user selects an incorrect answer choice, jump as far ahead in the story as needed to show the consequences of what would happen. You can use multiple slides to tell this story, but this branch should end in a “Try Again” button that brings people back to the question. Avoid the coaching voice…instead, tell us the story of the consequences.  （1）The customer becomes even more frustrated and complains that you're unable to resolve the issue on your own？  （2）As the customer waits in line, you engage in a conversation with the manager regarding the problem. After a few minutes, you come back with a response, stating that a refund cannot be processed due to it exceeding the return guarantee period.  （3）The customer becomes extremely angry and writes a negative review on the internet, which leads to a decrease in the company's revenue. |
| **Visual notes**  **The images on the left and prompts on the right.**   1. An angry face of the customer 2. The representative’s image, with hands outstretched to indicate there is no solution. 3. An angry face of the customer accompanied by an animation showing a negative review being written on Google Reviews.   Try Again button in under the prompt (3).    **Programming notes**  Jump to Question 2 slide when user selects Try Again button. |

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| **Question 3 - Choice B Consequence (Correct)** |
| **Prompt**  When the user selects the correct answer choice, advance the story while hinting at why our answer was correct. Be sure to avoid the coaching voice. See storyboard examples for inspiration.  (1)The reason is that the teacher keeps coming to classrooms late and ending classes early, and the teacher looks tired while teaching, so the customer feels that it is not worth the money.  (2)Following your communication with the quality assurance department, a more responsible teacher was promptly assigned for the subsequent class. To make amends for the missed class time, the customer was offered a complimentary session.  (3)The outcome left the customer greatly content. Instead of seeking a refund, the customer opted to register for more classes with the same teacher.  **Visual notes**  Prompts 1&2 in the middle  (3)An happy face of the customer on the left and the prompt 3 on the right. Continue button under the prompt. |
| **Programming notes**  Jump to Ending Slide when user selects Continue button. |

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| **Question 3 - Choice C Consequence (Incorrect)** |
| **Interviewer Prompt**  When the user selects an incorrect answer choice, jump as far ahead in the story as needed to show the consequences of what would happen. You can use multiple slides to tell this story, but this branch should end in a “Try Again” button that brings people back to the question. Avoid the coaching voice…instead, tell us the story of the consequences.  The customer doesn’t think so and insist on getting a refund. The company loses a customer. |
| **Visual notes**  An angry face of the customer on the left and the prompt on the right. Try Again button under the prompt.  **Programming notes**  Jump to Question 2 slide when user selects Try Again button. |

Start wrapping up the experience by taking us from the previous correct answer choice consequence towards the happy conclusion.

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| **Ending slide** |
| **Mentor Prompt**  You are doing a great job! You successfully retained a customer, which potentially leads to more sales for the company! You will get bonus because of your outstanding performance in helping increasing our sales! |
| **Visual notes**  Background is the same office. A happy woman image of the manager on the left. The character prompt on the right. Continue button is under the prompt.  **Programming notes**  Jump to Conclusion slide when user selects Continue button. |

Show us the happy conclusion of the experience that we would see after selecting all correct choices. You can do this as a prompt, or you can have the mentor character congratulate us (or both!).

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| **Conclusion** |
| **Prompt**  Congratulations! You have successfully completed the challenges! |
| **Visual notes**  Animation of the customer representative stretch his arms to celebrate in the office.  **Programming notes**  Restart the experience when user selects Restart button.  Exit the experience when user selects Exit button. |

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| **Share your Storyboard** |

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| Share your storyboard with your peers (or a bootcamp pro if you’re in the bootcamp) to get feedback! |

**To share**: Follow the instructions below.

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| **1** | Select the blue button in the top-right of the document labeled “Share”. |
| **2** | Select “Change to anyone with the link” at the bottom of the popup window. |
| **3** | Select the pulldown box that says “Viewer”. |
| **4** | Change the pulldown selection to “Commenter” and select the “Done” button. |
| **5** | Select “Copy link”. |
| **6** | Share the link with people who can give you feedback. |