

Stage	Module	Videos	Key Takeaways and Learning Outcomes	Playbook Activities and Tools
Onboard Mastering your Professional Impact skills empowers you to deliver exceptional customer experiences, collaborate more effectively, and accelerate customer and business growth.	1 Mindsets	- Welcome to Mindsets - Your role in the Customer Experience Journey - Cross-functional collaboration - D.R.I.V.E to S.E.R.V.E mindsets - The three customer realities - Pain-gain-status quo mindsets - Vitamins & painkillers - Draft your Power Statement - Key takeaways	Key Takeaways - Elevate collaborate to drive customer success - Customer mindsets drive buying decisions - Pain vs. gain require different messages - Clear positioning of your value builds instant credibility Learning Outcomes - Approach each day with the right mindset - Identify buyer mindsets - Create your modern elevator pitch	Real-world applications - Read customer motivation signals - Activate your professional mindsets to collaborate more effectively - Align features with customer motivations - Position your expertise as business value Playbook tools - Self-assessment - Customer experience growth journey - Drive to Serve assessment - Vitamins & painkillers map - Power statement guide
	2 Know Your Customer	- Welcome to Know Your Customer - Customer buying process (see through the customer's eyes) - Understand role-based customer personas - Map customer stakeholders - Build stakeholder relationships - Fundamentals of consultative selling - Grow client revenue (protect profits, upsell and retention) - Key takeaways	Key Takeaways - Multiple stakeholders influence decisions - Each role has unique motivations - Stakeholder maps guide strategic engagement - Relationships drive retention and growth Learning Outcomes - Understand customer expectations - Identify what stakeholders value - Build detailed stakeholder maps - Recognize growth & renewal signals	Real-world applications - Navigate customer organizations - Deliver value aligned with stakeholder priorities - Identify decision makers & influencers - Spot upsell opportunities earlier Playbook tools - Customer buying process matrix - Persona blueprint - Stakeholder value map - Grow client revenue checklist

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Engage Develop the soft skills that build trust, strengthen rapport, and elevate every interaction so you can connect and collaborate more effectively with customers and colleagues while earning trusted advisor status.	3 Build Rapport & Trusted Advisor Status	1. Welcome to Building Rapport 2. Build trust with rapport 3. Meeting presence 4. Non-verbal body language 5. Empathy and emotional IQ 6. S.C.A.N. active listening 7. Becoming a trusted advisor 8. Key takeaways	<u>Key Takeaways</u> – Trust begins with rapport and relationship building – First impressions happen once – Active listening builds trust & collaboration – Body language speaks louder – Proactive value earns trusted advisor status <u>Learning Outcomes</u> – Master professional presence and soft skills – Apply active listening – Demonstrate empathy during customer and internal conversations	<u>Real-world applications</u> – Earn trust sooner – Demonstrate soft skills to elevate the customer experience – Read unspoken customer concerns – Project confidence and engagement in meetings <u>Playbook tools</u> – Professional presence and soft skills checklist – S.C.A.N. active listening guide – Trusted advisor checklist
	4 Communicate with Credibility	1. Welcome to Communicate with Credibility 2. Speaking the customer’s language 3. When to call vs. send an email 4. Professional follow up and answering questions 5. B.O.L.D. message framework 6. P.O.W.E.R. message delivery 7. Master the Meeting 8. Key takeaways	<u>Key Takeaways</u> – Using customer language builds instant credibility – Translate technical jargon into English – Deliver B.O.L.D. communication that breaks through the noise – Use P.O.W.E.R. delivery framework – Lead more productive meetings <u>Learning Outcomes</u> – Translate expertise into customer language – Apply your “compass” to handle concerns	<u>Real-world applications</u> – Translate technical features into customer advantages – Elevate customer experience with impactful communications – Lead more productive meetings <u>Playbook tools</u> – Compass checklist – B.O.L.D. message framework – P.O.W.E.R. delivery guide – Meeting planner template

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			– Use B.O.L.D. for breakthrough messaging – Communicate more effectively	
Advance Apply research-backed frameworks and strategic questioning to disrupt barriers limiting success and develop value to position yourself as a trusted strategic advisor who seeks opportunities to drive greater customer value and accelerate your business growth.	5 Drive Customer Value	1. Welcome to Drive Customer Value 2. Introduction to 3D customer value drivers 3. Ask & answer strategic questions 4. Navigate difficult customer conversations 5. Disrupt barriers to customer success 6. Customer growth strategy tool walkthrough 7. Key takeaways	Key Takeaways – Remove barriers to elevating the customer experience – Elevate strategic questioning and answering capabilities – Turn difficult conversations into trust build events Learning Outcomes – Master disrupting roadblocks to advance customers to the next stage – Use insights to add value and challenge thinking	Real-world applications – Breakthrough the noise to drive value and achieve customer goals – Ask strategic questions to gain critical insights – Manage difficult customer situations like a pro Playbook tools – Strategic questions checklist – Navigate difficult customer conversations checklist – 3D Customer growth strategy tool
	6 Develop Value	1. Welcome to Develop Value 2. Introduction to develop customer value 3. Drive value to protect price & profits 4. V.A.L.U.E. Part 1: verify current state & asses the gap 5. V.A.L.U.E. Part 2: link to their strategic objectives 6. V.A.L.U.E. Part 3: unlock full value gap & engineer solution	Key Takeaways – Developing value drives customer success and profitability – Ask the essential questions needed to develop value and increase profitability – V.A.L.U.E. questions uncover the full value-gap Learning Outcomes – Apply V.A.L.U.E. questioning framework	Real-world applications – Systematically identify customer value-gaps to accelerate growth – Co-create bold value solutions from insights uncovered – Build ROI cases for customer expansion Playbook tools – V.A.L.U.E. questions – Value gap guide

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		- Build compelling business cases & share voice of customer insights - Key takeaways	Build compelling customer expansion business cases	
Advocate Integrate your Professional Excellence skills and all 3D value drivers to deliver bold value and elevate the customer experience. Equipping you to drive greater growth for your customers, your business and your career.	7 Deliver Bold Value	- Welcome to Deliver Bold Value - What is deliver bold value? - Deliver bold value bridge statements - Craft bold value success stories - Presenting value confidently - Contributing effectively to team presentations - Coordinate internal teams to deliver value - Key takeaways	Key Takeaways - Deliver value with bold impact - Craft value-bridge statements - Translate features into customer value - Tell stories & present with confidence - Collaborate to deliver bold value Learning Outcomes - Demonstrate value while protecting profits - Equip yourself to present value more effectively	Real-world applications - Persuasively communicate value - Motivate upsells and renewals - Generate referrals through success stories Playbook tools - Value-bridge statements blueprint - R.I.S.E. story canvas - Perfect team pitch planner
	8 Apply for Lasting Results	- Welcome to Integration & Professional Growth - Apply 3D value drivers to drive growth - Demo like a pro - Tradeshow ROI & networking - Professional digital communications - CRM best practices - Measure your customer impact (90-day action plan) - Key Takeaways	Key Takeaways - Drive bold value within each stage of the customer experience - Elevate your value through demos and tradeshows - Measure customer impact, not just activity - Continuous improvement drives ongoing success Learning Outcomes - Integrate fundamentals with 3D methodology	Real-world applications - Advance customers to the next stage & accelerate business growth - Maximize ROI from networking events - Track success metrics to demonstrate impact Playbook tools - P.O.W.E.R. tradeshow networking guide - Demo checklist - Customer impact plan

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		9. Course recap & your 90-day professional growth plan	– Create personal development plan	– Self-Assessment & 90-day growth plan