

Customer Success Management – *Facilitator Guide*



**DIGITAL
CAREERS
TOOLKIT**

BY



SHARED
LOGO

DOWNLOADABLE GUIDES



Customer Success - Facilitator Guide

This guide is prepared for teachers who use the Digital Career Toolkit as class activities, or counselors who use the Toolkit as a coaching guide.

Facilitation Suggestions

Below are suggestions to use the 'Explore Careers- Customer Success Management' section of the toolkit, with additional resources.

**Because some of the activities introduce the technical skills associated with the career, it is recommended that as a facilitator you try them first.*

In my class	Suggestion	Learners will be able to
I want to do a mini-lesson to generate career awareness	Learners read "Customer Success Management could be your future career path" and watch the 3 video clips of "Professionals who work in the Field"	Name what Customer Success Management is and say why it is important
I want one lesson to introduce Customer Success Management as part of a unit	Learners read "Customer Success Management could be your future career path" and do the "Want to try it out now?" activity. This gives a good idea of the field.	Name what Customer Success Management is and say why they could be interested in it
I want to include 2 lessons on Customer Success Management as part of a tech course or career studies unit	Learners work through all the Customer Success activities. See Lesson Suggestions below.	Name what Customer Success Management is, say why they could be good at it, and write up their plan to pursue this path
I am working individually with	Learners work through all the Customer Success Management activities. See	Describe the work, say why they are interested

learners as part of their postsecondary planning.	Lesson Suggestions below.	in pursuing this path, and add options to their postsecondary plan
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Try it out- Customer Journey Mapping

The Customer Journey Map is the best way to introduce the concept of tracking user experience.

- Model the example provided of a user searching online for a holiday gift for a friend.
 - The stages of the customer journey are:
 - Search for sites
 - Browse a site
 - Browse products on the site
 - Pay
 - At every stage of the customer journey, the CSM is tracking their:
 - Experience - what they're doing, how they're clicking
 - Expectations - whether they are finding what they are looking for
 - Emotions - feelings range from satisfaction to frustration
- Learners track their own customer journey through a search, and complete the chart provided on the last page of this guide. Provide direction on the kind of product or service to search for (e.g., a new pair of shoes, which gym to join, etc.).
- As an extension, learners track their use of a new app or tool using the same stages of experience, expectations, and emotions as they learn to use the app/tool.

Skills to Pay the Bills

As a facilitator, you can encourage a strength-based and growth mindset when discussing skills needed for a certain career.

- **Skills you already have** - Emphasizes durable skills that learners already have and/or can cultivate, especially communication and people skills
- **What you will learn** - Outlines skills to be learned - especially technical skills. Most companies will employ their own platforms. Being able to pick up on them will be less challenging with fluency in common customer facing tools. As an extension, learners can research some platforms and tools on their own:
 - Zendesk
 - Salesforce

Additional resource:

- This article from [Software Advice](#) provides additional context on skills needed for the job.

A Lesson Using the Job Description

- Designed as a synthesizing or culminating activity
- Note that the Job Description is an edited version of a posted job. The name of the company is removed. The Job Descriptions is skill-based - it does not require a degree
- Provide context to understand the components of a job description
- Suggested activities:
 - Learners highlight technical vocabulary to research
 - Onboarding
 - Product Adoption
 - KPIs (Key Performance Indicators)
 - Metrics
 - Business Review
 - Incremental Revenue
 - C-Suite
 - In another color, learners highlight the skills they bring from the 'About you' section:
 - Communication
 - Organization
 - Problem Solving
 - Creativity
 - Collaboration
 - Persistence
 - Ask learners to project into the future and write a 250 word paragraph expressing interest in the job
 - This can be extended to Make a Plan to pursue training and position themselves to be ready to apply for this kind of job in the future
 - Create mock interview panels with learners in which they "interview" for this job as a culmination for what they learned through the Toolkit.

Using the Toolkit to Make a Plan

See Facilitator Guide to [Make a Plan](#)

Have a question? Have suggestions or advice for other teachers? Fill out the ['Contact Us'](#) form.



Download - Customer Journey Map

What are you looking to buy or learning to use?			
	1. Start by doing Research. Visit one website:	2. Compare your experience with this site/app with another one.	3. Once you've decided which website/app you prefer to buy/use, right before you click "Purchase":
What Questions do you ask as you scroll through the site?			
What Emotions do you feel as you look at the pages?			
What could the site/app do to make it easier for you?			