

## TRAINING MODULE 1

### Introducing the Business Consultants to ExBased

#### Purpose

This module is for business consultants who wish to introduce or develop an understanding of the experience economy with their clients.

In this module we explain:

- The ExBased Programme
- The ExBased Toolbox
- The Experience Economy

The module is designed so that it can be delivered by a trainer to a number of business consultants, and so that the business consultant can work through the material on his or her own.

#### Rationale

A basic understanding of the ExBased Programme will be useful for business consultants so they can understand how the Toolbox was developed.

An understanding of the Toolbox will enable business consultants to make full use of it to support them in their work with businesses.

A basic understanding of the experience economy will enable business consultants to feel confident when they work with businesses, and more able to respond to the aspirations of the business.

#### Methodology

The module should provide an opportunity for discussion and reflection as well as presenting information. This will work well if the module is delivered by a trainer to a number of business consultants. Pair work and small group work are useful in enabling participants to hear others' viewpoints. Feedback is useful in assessing how well the information has been understood.

The business consultant can also work through the material on his or her own.

#### Tone and style

Business consultants working with ExBased materials will understand their craft and will have reached a level of professional competence. Some may be familiar with the Experience Economy, and may have used the concept to inform their work with some businesses.

This introduction module respects the existing knowledge and experience of business consultants.

If a trainer is introducing the module, the tone should be one of shared debate and discovery, with the trainer as guide and coach, providing opportunities for knowledge and experience to be shared within the group.

# Ex- Based

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experience-based economy

## Duration

There are three parts to this module:

- Introduction to the ExBased Programme - maximum 30 minutes
- Introduction to the Toolbox - maximum 60 minutes
- Introduction to the Experience Economy - maximum 90 minutes

Each part is supported by a PowerPoint presentation which can be presented by a trainer or worked through by the business consultant alone

## Introduction to the ExBased Programme

max 30 minutes

PowerPoint Presentation - Introduction to the ExBased Programme

Discussion/ Q&A

## Introduction to the Toolbox

max 60 minutes

PowerPoint Presentation - Introduction to the ExBased Toolbox

Hands-on demonstration/discussion - the articles and how they might be used; the different types of case studies and how they might be used; accessing the website

Discussion/Q&A

## Introduction to the Experience Economy

max 90 minutes

PowerPoint Presentation - What is the Experience Economy?

Exercise - Personal Recollections

Discussion

## TRAINING MODULE 2

### How to use the Customer Experience Tool

In summary, the Customer Experience Tool provides business consultants with a structure for:

- Explaining what the Experience Economy is
- Enabling the business to relate its products and services to the Experience Economy
- Enabling the business to take steps to improving its engagement with the Experience Economy

#### Purpose

This module is for business consultants who wish to use the Customer Experience Tool developed especially for the ExBased Programme.

In this module we explain:

- How to use the Customer Experience Tool

The module is designed so that it can be delivered by a trainer to a number of business consultants, or so that the business consultant can work through the material on his or her own.

#### Rationale

A basic understanding of the Customer Experience Tool will enable business consultants to feel confident and competent in using the tool.

Business consultants are encouraged to use their own experience and examples to enhance their understanding of the tool.

#### Methodology

The module should provide an opportunity for discussion and reflection as well as presenting information. This will work well if the module is delivered by a trainer to a number of business consultants. Pair work and small group work are useful in enabling participants to hear others' viewpoints. Feedback is useful in assessing how well the information has been understood.

The business consultant can also work through the material on his or her own.

#### Tone and style

The participants in the ExBased Project will be experienced business consultants who understand their craft and who have reached a level of professional competence.

They may be familiar with using tools to stimulate interest and understanding, and have useful ideas on how the tool can be adapted.

If a trainer is introducing the module the tone should be respectful of the consultants' knowledge and experience, and the trainer should provide opportunities for them to share this within the group.

The overall tone should be one of shared debate and discovery with the trainer as guide and coach.

## Duration

The best way to understand the Customer Experience Tool and to learn how to use it is by experiencing it. We have therefore designed a 'training workshop' which is a time-limited version of the stages covered by the Customer Experience Tool.

The workshop can be delivered by a trainer to a number of business consultants.

If the business consultant is working through this material alone, we would recommend that he or she practices the workshop with a colleague.

N.B. When the business consultant is using the tool with a business, he or she will adapt the length of the stages to the time available.

## How to use the Customer Experience Tool

max 60 minutes

There are seven stages to the Customer Experience Tool. However, in the training workshop the focus should be on Stages 1 to 3. Stage 4 The training workshop time-limited version of the Customer Experience Tool is described below.

## TRAINING WORKSHOP

### Stage 1 - Bad Experience

10 minutes

The purpose of this stage is to introduce the importance of 'experience' and to open up discussion on the impact of 'a bad experience'.

- Participants are invited to select 3 images from the set of images provided, which they relate to a bad experience they have had e.g. waiting in an airport lounge; bad service in a restaurant; poor utilities providers
- They are then invited to describe their bad experience and in doing so to think of 5 words for each image which describe their feelings e.g. frustration; disappointed expectation; irritation; anxiety

This stage is about understanding what the customer feels as a result of a bad experience.

### Stage 2 - Good Experience

10 minutes

The purpose of this stage is to further demonstrate the importance of 'experience' and open up discussion on the impact of 'a good experience'.

- Participants are invited to select 3 images from the set of images provided, which they relate to a good experience they have had e.g. a good service in a restaurant; good service from utilities providers
- They are then invited to describe their good experience and in doing so to think of 5 words for each image which describe their feelings e.g. excitement; joy; pride; discovery;

This stage is about understanding what the customer feels as a result of a good experience.

## Stage 3 - Our Products and Services

10 minutes

*In the training workshop, consultants need to imagine themselves in the role of the business owner or representative for this stage of the workshop, perhaps using a business they have worked as an example.*

At this stage of the exercise the participants stop thinking about themselves as consumers and think from the perspective of the business owner or representative.

The purpose of this stage is to enable the business to describe what it knows about how its customers experience its products and services.

- Participants are invited to provide 3 images of their business's existing products or services. They might use photographs or draw the images
- They are then invited to think of 5 words for each image which describe their feelings e.g. excitement; disappointment; joy; pride; irritation; discovery;
- The consultant might invite participants to include broader aspects of their business in this exercise e.g. how do customers experience their website; their receptionist; their billing system.

## Stage 4 - Introducing The Experience Economy

*If the business consultants have already seen the PowerPoint presentation Introduction to the Experience Economy this stage can be omitted in the training workshop.*

The purpose of this stage is to introduce the business to the concept of the experience economy, so that they can begin to see opportunities for developing their products and/or services.

## Stage 5 - Case Study

10 minutes

*In the training workshop it is recommended that business consultants are shown the summary of case studies and invited to think about how they would use a case study to help the business think about how it might develop its products and services. They might have their own case studies which are also relevant to the types of business they work with.*

The purpose of this stage is to show the business an example of a company that has used an understanding of customer experience to re-model their business offer.

## Stage 6 - Development Tools

*In the training workshop this stage can be omitted.*

The purpose of this stage is to provide the business with an opportunity to review its products and services in the light of the above discussions.

- The consultant may chose another tool to take the business through this stage
- The Five Senses tool encourages the business to think about all aspects of creating an experience
- The Prioritising Tool helps the business to focus on the options best suited to its products and services

The consultant will follow the instruction for the selected tool

## Stage 7 - Action Planning/Next Steps

20 minutes

*In the training workshop this stage would provide a good opportunity to exchange ideas on how businesses could be supported in further developing customer experience.*

The purpose of this stage is to agree with the business what it needs to do next and what support it needs.

- The consultant will facilitate a feedback discussion and encourage the business to think positively about how it can take action.
- The consultant will use her/his local knowledge to agree the next stage with the business. The consultant might:
  - » Suggest follow up consultancy sessions.
  - » Offer advice on access to funding for follow up work.
  - » Offer to summarise the workshop into a report so that the business has an agenda for its next steps.
  - » Offer information on online resources for follow up work
  - » Signpost the business to other sources of advice/assistance

## TRAINING MODULE 3

### Using the Customer Experience Tool with a Business

#### Purpose

This module is for the business consultant. It provides guidance on how to prepare for working with a business and suggests how long each stage of the Customer Experience Tool might take.

N.B. These timings are only suggested as a guide. The consultant will adapt the length of each stage to the time available and the particular needs of each business.

#### Preliminary Work

The consultant will need to have some basic information about the business. How this is accessed will be dependent on the scheme, programme or agent brokering the connection between the consultant and the business.

The consultant will need to know at least:

- What the business does
- Its size - number of employees, turnover
- Its current state - e.g. market position, stability

Wherever possible the consultant should research the business's website to see how it talks about itself and presents itself to the outside world.

#### Optional Introductions

The consultant may be working independently or with an organisation providing business consultancy.

If the consultant or organisation wishes to explain the ExBased Programme to the business, they can use the PowerPoint presentation Introduction to the ExBased Programme.

If the consultant or organisation wishes to explain how the Customer Experience Tool has been developed they can use the PowerPoint presentation Introduction to the Customer Experience Tool.

## The Customer Experience Tool with a Business

### Stage 1 - Bad Experience

20 minutes

The purpose of this stage is to introduce the importance of 'experience' and to open up discussion on the impact of 'a bad experience'.

- Participants are invited to select 3 images from the set of images provided, which they relate to a bad experience they have had e.g. waiting in an airport lounge; bad service in a restaurant; poor utilities providers
- They are then invited to describe their bad experience and in doing so to think of 5 words for each image which describe their feelings e.g. frustration; disappointed expectation; irritation; anxiety

This stage is about understanding what the customer feels as a result of a bad experience.

### Stage 2 - Good Experience

20 minutes

The purpose of this stage is to further demonstrate the importance of 'experience' and open up discussion on the impact of 'a good experience'.

- Participants are invited to select 3 images from the set of images provided, which they relate to a good experience they have had e.g. a good service in a restaurant; good service from utilities providers
- They are then invited to describe their good experience and in doing so to think of 5 words for each image which describe their feelings e.g. excitement; joy; pride; discovery;

This stage is about understanding what the customer feels as a result of a good experience.

### Stage 3 - Our Products and Services

30 minutes

At this stage of the exercise the participants stop thinking about themselves as consumers and think from their own perspective as the business owner or representative.

The purpose of this stage is to enable the business to describe what it knows about how its customers experience its products and services.

- Participants are invited to provide 3 images of their business's existing products or services. They might use photographs or draw the images
- They are then invited to think of 5 words for each image which describe their feelings e.g. excitement; disappointment; joy; pride; irritation; discovery;
- The consultant might invite participants to include broader aspects of their business in this exercise e.g. how do customers experience their website; their receptionist; their billing system

## Stage 4 - Introducing The Experience Economy

20 minutes

The purpose of this stage is to introduce the business to the concept of the experience economy so that they can begin to see opportunities for developing their products and/or services.

This is an optional stage. The consultant will decide whether using the PowerPoint presentation Introduction to the Experience Economy is something that the business would find interesting and/or useful.

## Stage 5 - Case Study

20 minutes

The purpose of this stage is to show the business an example of a company that has used an aspect of customer experience to re-model their business offer.

The ExBased Toolbox contains a selection of Case Studies which are summarised in the document Summary of Case Studies. The Summary also has suggestions for the type of situation in which the case study might be useful, for example, if the business is in retail; if it is a traditional business needing to change its approach to customers; if it needs to diversify its product base; if it is business-to-business.

We would strongly encourage the business consultant to use case studies from his or her own experience. Examples which are from the same sector or the same country as the business you are working with might be particularly useful in some situations.

## Stage 6 - Development Tools

(120 minutes)

The purpose of this stage is to provide the business with an opportunity to review its products and services in the light of the above discussions

- The consultant may chose another tool to take the business through this stage
- The Five Senses tool encourages the business to think about all aspects of creating an experience
- The Prioritising Tool helps the business to focus on the options nest suited to its products and services

The consultant will follow the instructions for the selected tool

## Stage 7 - Action Planning/Next Steps

40 minutes

The purpose of this stage is to agree with the business what it needs to do next and what support it needs.

- The consultant will facilitate a feedback discussion and encourage the business to think positively about how it can take action
- The consultant will use her/his local knowledge to agree the next stage with the business. The consultant might:

- » Suggest follow up consultancy sessions
- » Offer advice on access to funding for follow up work
- » Offer to summarise the workshop into a report so that the business has an agenda for its next steps
- » Offer information on online resources for follow up work
- » Signpost the business to other sources of advice/assistance

## Ending the workshop

The consultant will summarise the process, invite feedback and note suggestions for adapting or improving the tool.

S/he will confirm any actions that have been agreed and give a timescale for their delivery.



The ExBased project is co-financed by the European Commission's Lifelong Learning Programme.  
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