

*The Consortium
for Service Innovation*



Leader's Guide

Objective

This leadership guide has been developed as a tool to assist you in leading and facilitating a thought provoking group exercise in examining the question. . .

What are the customer service business models for the future?

The objective of this exercise is to generate strategic conversations. Using scenario based planning we will encourage people to think about the possibilities in an uncertain future. We are not looking to decide on one future state, but to consider many future states and the impact each will have on the key stakeholders: the customer, the employee, and the company. There are no absolute or correct answers as the value is in exploring the possibilities.

Introduction to Scenario Based Planning

Scenarios are a tool for helping us to take a long view in a world of great uncertainty. They are stories about the way the world might turn out tomorrow. Without absolute answers about what the future will look like, scenario based planning gives us a way to think about the many possibilities of how the future will differ from the present, and the implications of those changes, better preparing us for dealing with changes as they occur.

Scenarios often (but not always) seem to fall into three groups: more of the same, but better; worse, and different but better. Reality may turn out to be a combination of all three scenarios, or take yet another path. Nothing is too outlandish to consider in thinking about how the future might unfold.

Your role as the facilitator is to encourage open conversations focused on the question of what customer support and service business models will look like in the future, using the four scenarios created for this exercise as a basis of discussion. Multiple support models can fit into any one scenario. The participants should be encouraged to be as diverse and creative as possible in discussing their vision of the future and the implications of each idea on the customer's experience. The discussions should not debate the probabilities of any one idea, but focus on the implications of its occurrence. In discussing these future states there is a tendency to want to debate the likelihood of each of them; no one knows what the future will hold so debating it is fruitless. Taking each scenario as a "what if" proposition and exploring the implications will help prepare for a variety of possible future states.

Outcome

A positive outcome from this exercise is to have people engaged in stimulating conversations surrounding each scenario, with their focus on evaluating the implications and opportunities for customer service organizations based on different views of the future. Participants should look at the key elements of each strategy that they come up with, and compare it with current practices. This will help determine a handful of strategies for customer support that need to be worked on. It will highlight present strategies that need updating and new strategies that need to be developed.

Who Should Attend?

Ideally, the group will be made up of 16-20 people who serve a common target market. For example, all participants might be geared toward the Enterprise market, or perhaps the Mid-Market, Small Office/Home Office, or Consumer based markets. Having a shared perspective and a common understanding among the participants is a strong basis for carrying a conversation about the future forward.

The attendees themselves will most likely be a cross section of people who work in support delivery. This would include the Formal Leaders of the organization such as the managers and planners, the Informal Leaders in the organization who are the problem solvers, the Thought Leaders and Innovators who consistently explore new ideas. Functions who would find this an enlightening exercise include Service Marketing, IT Planning, Service Planning, New Product Introduction, Service Delivery and Field Support.

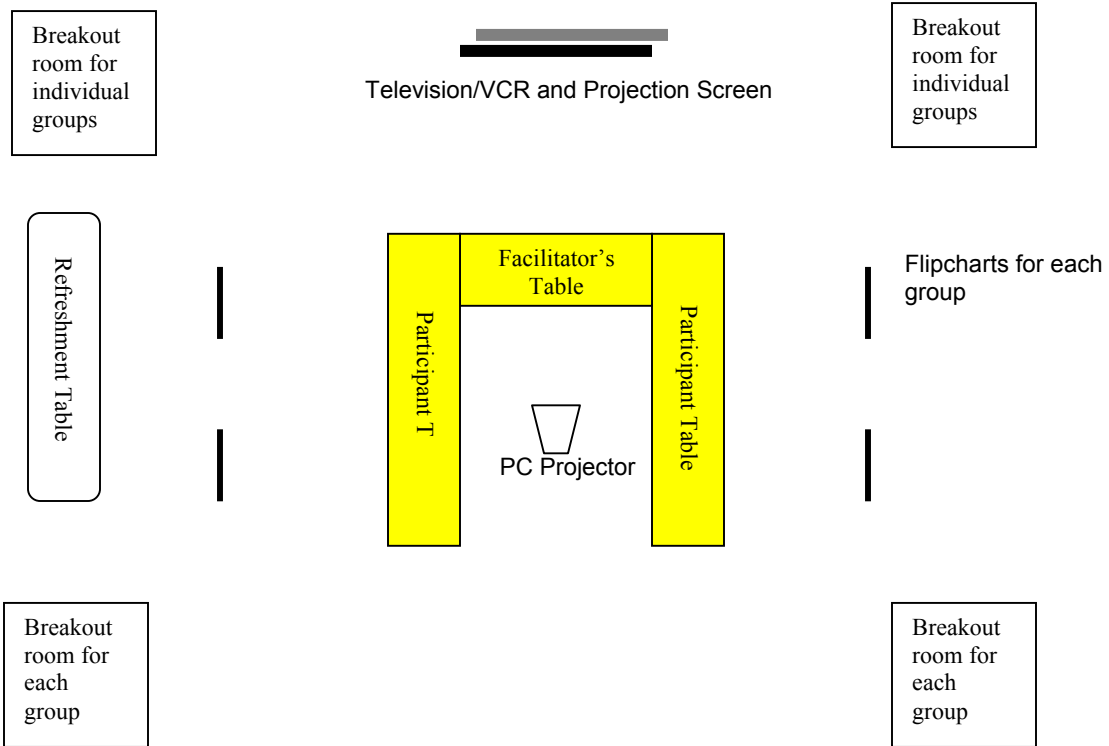
Pre-Reading Materials

In the kit of materials you have received, there is a paper entitled *Support Futures*, which should be read by the attendees prior to the session. We recommend that you make sure the participants receive copies of this handout at least 3 days prior to the meeting for review.

For those who would like more information about scenario based planning, we recommend the book, “**The Art of the Long View**”, by Peter Schwartz.

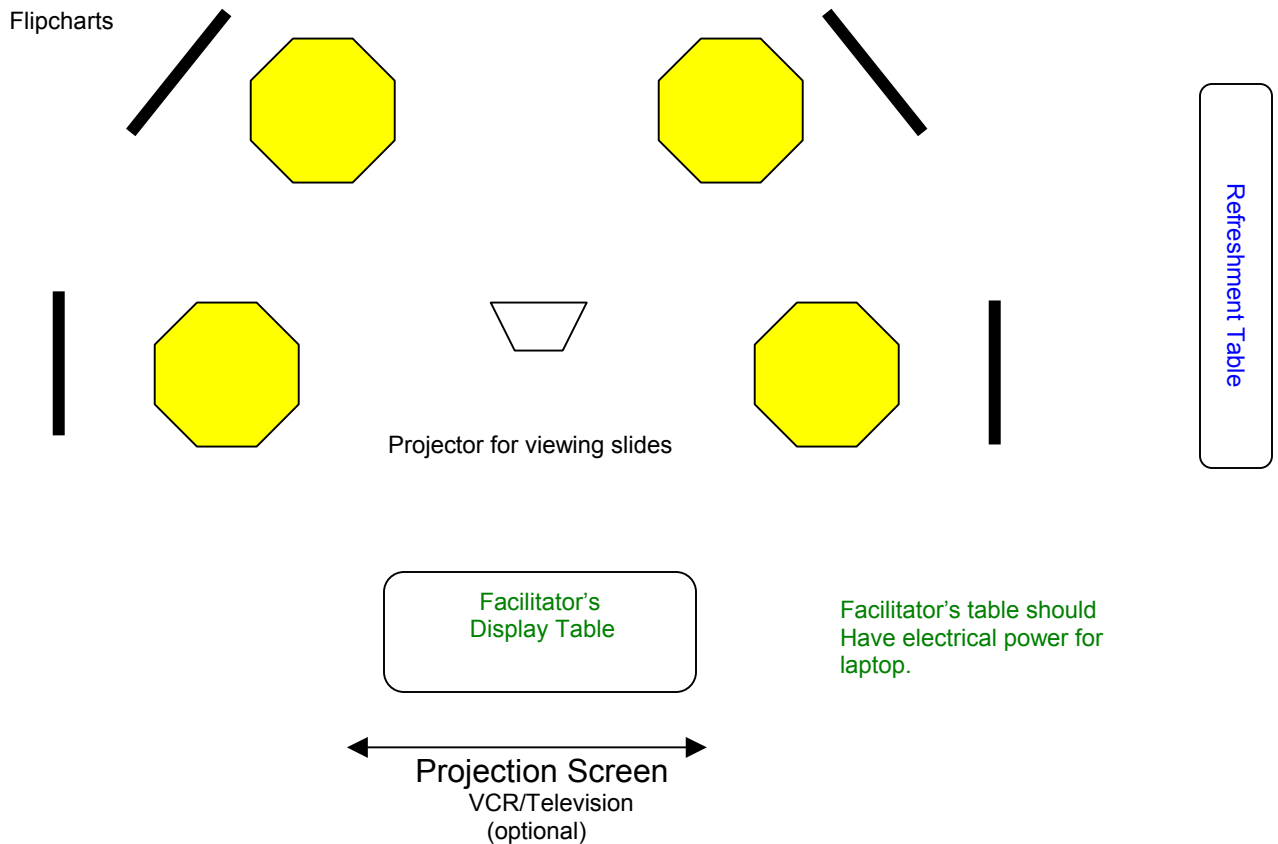
Room Set-up

Below we have included a detailed description of an ideal meeting set-up. We have also included an alternate layout, which can also be used at your discretion.



With this floor plan, the entire group will convene and discuss the exercise. Then Breakout groups will be assigned a room and a quadrant to discuss. Once in the breakout room the participants will view their particular scenario on CD Rom and follow the exercise description below. After the exercise has been completed, the meeting will reconvene for a group discussion of each scenario. Each team will present their scenario (VHS or PC with projector) and their observations.

The second setup consists of all participants working in the same room and viewing all four scenarios together, but working separately at their own tables on one assigned quadrant.



With this layout, we suggest the participants view all scenarios together on VHS.

The Exercise

Each table or breakout room should contain:

- Strategic Element Cards (5 Strategic Areas plus two wildcards)
- Handout- Strategic Conversation Guide (1 copy for each participant)
- Flipcharts and note pads to brainstorm ideas among participants

- Laptop with CD Rom and electrical power source (optional), if not showing VHS

Facilitator should have access to:

- Projector and screen for viewing scenario
- Laptop equipped with CD Rom
- Front table with supplies (laptop, pens, paper, etc.)
- Flipchart for facilitator
- PC projector to view power point slides
- VCR and television (preferred way of viewing scenarios)

Facilitation of the Exercise

Conversation before starting the exercise:

You will want to review with the participants the Customer Solutions/Product Technology Quadrants and their definitions, the five strategic-areas, and the Strategic Elements in each area.

Now and throughout the exercise emphasize that there is no right or wrong answer. As the participants brainstorm possible future scenarios, help them to avoid “picking a favorite” idea.

Getting the Exercise Started

The ideal group size for this exercise is 16 participants. This allows four break out groups of four each.

In facilitating a group of less than 12, you may choose to split the group into two with each group viewing two scenarios. In this case, you may want to use the first floor plan we suggested. All the participants can view the scenarios together and disperse into two breakout groups.

Use your discretion to decide which setup will work best for your participants.

The Exercise (Time allowed 3- 4 hours)

Once the teams have been established, they should be assigned a quadrant to discuss. The teams will view the scenarios together as in the second setup, or in breakout groups as in the first setup. The teams should be instructed to pay close attention to their particular scenario, and then choose one Strategic Element from each of the five Strategic Areas that they feel will be the predominate or critical strategy. In addition, the group will choose two wildcard picks from any of the five areas. The number of Strategic Elements should total

seven. This is intended to produce an insightful conversation in reference to their scenario.

After each group has completed their analysis, all teams will come back to the conference room to discuss their scenario and the seven key elements they chose. At this time, the groups will view the scenarios together if they have not already done so, and review the Power Point slides. The individual groups will explain scenarios and why they felt their key elements were critical to their quadrant.

The facilitator should allow at least 3-4 hours to complete the exercise.