meSE **_Storyboard Reference Guide_**

**What is a Storyboard** – A storyboard is a methodology that is commonly used in movie making to illustrate the sequences of the scenes. Similarly, it can be used in customer meetings or calls to assist you with documenting customer information in an easy to follow format that ultimately is going to help you tell a story.

**Keys to a successful Storyboard**

- Use a standard model/template like the one provided or customize it to your industry
- Work the Storyboard from the 'bottom-up'
- Research your customer extensively prior to the meeting
- Facilitate your customer through the Storyboard process and explain to them the format and goals of the process
- Prepare in advance and always ask open-ended relevant questions
- Use the question responses to illustrate on your Storyboard
- Use common pictures of symbols to illustrate what you are inputting on to the Storyboard that will make sense when you or your customer refer back to it versus 'wordy' input
- Create a compelling image as you are filling out the Storyboard that draws the customer in and shows your value in addressing their business issues and helping them to achieve their goals

**Research Sources**

- Company website
- Competitor websites
- Online newspapers
- LinkedIn
- Facebook/Twitter or other social media outlets
- Google Search
- Company financial documents such as Annual Reports, Quarterly Reports, 10-K Statements

**Storyboard Input – *Work From the Bottom-Up on the Storyboard Template***

**<u>Customer Environment</u>**

- ***Type of Information Needed***
  - Customer locations (if relevant to your solution/discussion)
  - Customer's current solution
  - Customer organizational details
  - Anything that is foundational to the customer's environment that pertains to your industry that you are discussing with them
- ***Keys to Success***
  - Ask a lot of open-ended questions in this segment – let the customer talk and you listen!
  - Cover all aspects that you think are relevant to ultimately tie back to your solution's value

**<u>Business Trends</u>**

- ***Type of Information Needed***
  - What is happening in the **customer's** market/industry **(not yours)**
- ***Keys to Success***
  - Use your research in this segment
  - Demonstrate your knowledge of the customer's industry trends and use that, if possible, to tie back to your solution value without actually discussing your solution at this point
  - Gain insight from the customer on what they know about their industry
  - Attempt to tie in their insight, your insight, and solution value – you are starting to build and tell a story

**<u>Challenges</u>**

- ***Type of Information Needed***
  - List the customer's top projects and goals
  - Identify issues such as resource or other issues
  - Outline specific competitive pressures
  - Uncover any financial concerns such as CapEx versus OpEx
- ***Keys to Success***
  - Try to focus on challenges that are directly related to who you are meeting with or their department
  - Understand how those challenges relate to your solution value and how your solution may be able to help solve them or ease them

**Demands on the Business**

- ***Type of Information Needed***
  - What parts of the business are drawing resources from your customer
  - Departmental demands or issues
- ***Keys to Success***
  - Link demands to challenges and trends

**Current Solution Financial Information**

- ***Type of Information Needed***
  - Costs – both hard and soft costs
  - What type of financial risks may exist
- ***Keys to Success***
  - Don't need specific $$ here, just ball park – if a TCO (total cost of ownership) or ROI (return on investment) model is a potential next step, try to be more specific

**Proposed Solution**

- ***Type of Information Needed***
  - Solution story
- ***Keys to Success***
  - This is where you take everything you've built in the storyboard and relate it to your potential solution and tell the value story
  - How can you address their challenges and demands
  - How can you solve their business issues
  - This is your time to relate your company's value and how that will help them solve their business issues and meet demands…ultimately, make them successful
  - You do not have to articulate a full solution at this point, only tell a story and close for the next meeting where you will take everything gathered and use that to put together a potential solution