customer conversation
release notes
March 2022

what's new

Your Corporate Visions subscription includes automatic access to current research, new products, new releases, and product updates. Maximize the value of your subscription by keeping it current with these available updates since the July 2021 release notes. Major announcements are highlighted below, while product specific details are outlined on the following pages.

Create Value Skills digital redesign

Redesign delivers a totally new learner experience that includes expert insights and engagement.

While the Create Value Skills concepts and intellectual property remain consistent, the digital modules have been completely reimagined. This is the second phase of CVI's redesign of all digital content. Digital modules now include a variety of modalities to improve the learning experience and retention. This includes videos, animations, engaging visuals, and learner interactions. Videos of CVI consultants sharing stories and key learnings bring the Create Value experience to life.

Addition of practice modules and video simulations improves retention and application.

The Inline experience has been upgraded with new practice modules at the end of each section of the course. These modules have learners practice their new skills within realistic situations that prepare them for applying the skills to their own accounts. Also new is a simulation for each decision that presents video branching scenarios where learners practice having Why Change and Why You conversations with prospective customers.

Redesigned Inline workbook connects the learning experience to actual skill and account application.

The Inline experience also integrates an interactive workbook into the daily learning experience. Each day ends with sending the learner into their workbook to complete activities that apply the new concepts and skills to their account.

Customer Success Suite

This new subscription offering is a portfolio of skills courses designed specifically for Customer Success professionals. The current releases are available for instructor-led delivery, whether virtual or in-person. Inline options will be available later in 2022. The suite includes:

Create Success

Master customer onboarding by defining future success and delivering the promised change.

Customer Success teams often don't know how a new customer will measure success and business value derived from the solution.

Yet it's Customer Success' job to strategically manage, nurture, and grow your customer relationships. It's not enough to drive utilization of your product or service; you must continue to communicate the business value they're getting from it.

Throughout this workshop, customer success professionals will learn the specific frameworks and conversational techniques—Why Change, Partnership Planning, Pivotal Agreements, and more—that build their ability to onboard new customers, define future success, and deliver on the promised business change.

Elevate Success

Engage executive buyers throughout the life of the contract.

Customer Success teams often focus on operations, adoption, and usage. As a result, executives stop attending business reviews and other important meetings since the conversations focus on tactical metrics and topics.

Customer Success is also tasked with achieving the business and financial impact that was sold to the customer's leadership. To sustain executive engagement, the conversation needs to be focused on business value and financial metrics.

During this workshop, Customer Success professionals will develop the skills to gain access to and engage executives by demonstrating a higher degree of business acumen through concepts such as money flow, performance metrics, and economic justification.

Expand Success

Strengthen, retain, and grow existing customer partnerships.

Evolving customer partnerships is about more than utilization, satisfaction, and problem resolution. It's also about how you're driving business value in their organization—and how that value yields customer retention and growth.

Customer Success technologies enable you to track usage, interactions, problems, and resolutions. However it does not help you quantify and communicate the business value you are delivering. Customer Success professionals need to anchor relationships in the value your solution provides in business and financial terms.

Throughout this workshop, Customer Success professionals will develop the specific frameworks and conversational techniques—Why Evolve, Why Stay, managing tension, delivering apologies, and more—that build their ability to retain, renew, and grow existing customer partnerships.

Expand Value Skills for High-Velocity Sellers

High-Velocity sellers now have an experience tailored to retaining and growing existing customer relationships.

This version of the Expand Value digital modules, workbook, and workshop delivery has been adapted to reflect the unique skills required in a high-volume, high-transaction sales role working solely with small and mid-sized customers in situations where deals are closed in one to three calls. This new offering is available in Instructor-led and Inline delivery options.

Create Value Skills for High-Velocity Sellers Inline

High-Velocity sellers now have an Inline experience tailored to convincing small and mid-sized businesses to change and to change with them, to complement the existing Instructor-led offering.

The Create Value for High-Velocity Sellers digital modules now include an Inline Introduction, videos to set up the fluency challenge, along with challenge instructions and a rubric. Now High-Velocity sellers have both Instructor-led workshop and Inline delivery options to develop their skills to convince small and mid-sized businesses to change and to change with them.

Instructor-led workshops

Creating a more consistent learner experience and simplified approach to self-hosting.

CVI is removing the use of digital modules as pre-work for In-person, Instructor-led workshops. This will provide a more consistent learner experience as all participants will enter the workshop on an equal basis. In addition, CVI is limiting digital modules to the morning sessions in all Virtual Instructor-led workshops. This provides more time during the Virtual workshops for facilitators to provide insight and practice. These changes also enable the use of a single digital course for both workshop situations – in-person or virtual. Participants can download materials and activate their reinforcement *prior to* a workshop *and* have access to all the digital modules to use during or after the workshop, as the situation dictates.

Ongoing Change Log

Seeing new content and what has been updated has never been easier.

A reminder, that as of April 15, 2021, CVI maintains an ongoing log of file updates to the Subscriber Portal to give you visibility into the latest file updates. The log includes update recommendations, flags new content, and highlights whether the update is recommended or optional. Also included are the date the file was updated (month/date/year), and a description of the updates included. If there is no date following the file name it is the most current file available. You can view the Product Updates in the CVI Subscriber Portal. You can directly access the Product Change Log.

delivery options	description
Inline Training	- Self-directed Learning using: - Digital Modules - Fluency Challenge with Coaching - Skills Reinforcement
Virtual Instructor-led Workshop	- Virtual, Instructor-led Workshop (1 or 2 days) - Digital Modules integrated into workshop delivery - Skills Reinforcement
In-person Instructor-led Workshop	**No digital module pre-work** - In-person, Instructor-led Workshop (1 or 2 days) - Skills Reinforcement

Create Value Skills	
product	**update**
Create Value Skills Inline	• **Redesigned**—the original content modules, simulations, workbook and other Inline assets have been redesigned. • **New**—Six practice modules have been added to the Inline course along with two new simulations. • **The module names and running order have some changes, so reference your decision Inline Self-host Handbooks** to guide you in building updated Inline courses. • **Update** your English-language courses to take advantage of this superior new design. • **English**—The new digital modules and assets are only available in English. Use the original localized modules and assets to support your localized courses.
Create Value Skills Virtual Instructor-led	• **Includes e-learning integrated into the morning sessions only, providing more time for instructors to provide insights and practice.** • **Redesigned**—the original content modules and simulations have been redesigned. • **Updated to reflect content updates** – Virtual leader slides, instructor-led workbook, planners and other virtual assets have been updated • **The module names and running order have some changes, so reference your Instructor-led Self-host Handbooks** to guide you in building updated courses. • **Update** your English-language courses to take advantage of this superior new design. • **English**—The new digital modules and assets are only available in English. Use the original localized modules and assets to support your localized courses.
Create Value Skills In-person Instructor-led	• **No longer includes e-learning pre-work.** • **Updated to reflect content updates**—leader slides, leader guide, instructor-led workbook, planners and other In-person assets have been updated. • **English**—The new assets are only available in English. Use the original localized assets to support your localized courses.
Create Value Insights	• **New**—library of short videos from CVI consultants to reinforce Create Value Skills. Available as a new Allego Channel and for self-host. Files can be found in the 2022 Refresh Self-host folder.

Create Value for High-Velocity Sellers Instructor-led (Virtual or In-person)	• **Name change and minor updates to Instructor-led materials**—slides, worksheets, and workbook.
Create Value for High-Velocity Sellers Inline	• **New**—Inline digital modules, worksheets, and workbook • **Reference your Create Value for High-Velocity Sellers Self-host Handbook** to guide you in building new Inline courses.

Elevate Value Skills	
product	**update**
Elevate Value Skills Virtual Instructor-led	• **No longer includes e-learning during virtual delivery.** The Elevate Value Virtual workshops focus on the C-level executives providing the learning and value during the workshop. All of the digital modules are available for reference and reinforcement after the workshop. • **Updated**—Instructor-led workbook has some minor edits.
Elevate Value Skills In-person Instructor-led	• **No longer includes e-learning pre-work.** • **Updated**— Instructor-led workbook has some minor edits.
Elevate Value Executive Insights	• **New**—library of short videos from former C-level executives to reinforce Elevate Value Skills and win executive conversations. Available as a new Allego Channel and for self-host. Files can be found in the Refreshed Content Self-host folder.

Expand Value Skills	
product	**update**
Expand Value for High-Velocity Sellers Instructor-led (Virtual or In-person)	• **New**—digital modules, worksheets, and workbook • **Reference your Expand Value for High-Velocity Sellers Self-Host handbook** to guide you in building new Instructor-led courses. • **New**—leader slides and leader guide
Expand Value for High-Velocity Sellers Inline	• **New**—digital modules, worksheets, and workbook • **Reference your Expand Value for High-Velocity Sellers Self-Host handbook** to guide you in building new Inline courses.
Expand Value Skills Virtual Instructor-led	• **Includes e-learning integrated into the morning sessions only, providing more time for instructors to provide insights and practice.**

Expand Value Skills In-person Instructor-led	• **No longer includes e-learning pre-work.**

Capture Value Skills

product	update
Capture Value for High-Velocity Sellers Instructor-led (Virtual or In-person)	• **New**—worksheets, workbook, case study, and skill practice exercises • **No digital modules, so there is no Self-Host** • **New**—leader slides and leader guide
Capture Value Skills Virtual Instructor-led	• **Includes e-learning integrated into the morning sessions only,** providing more time for instructors to provide insights and practice.
Capture Value Skills In-person Instructor-led	• **No longer includes e-learning pre-work.**

Situational Sales Negotiation

product	update
Situational Sales Negotiation In-person	• **New**—leader slides

Create Success

product	update
Create Success Instructor-led (Virtual or In-person)	• **New**—leader slides and leader guide • **New**—participant workbook, worksheet, and planner

Elevate Success

product	update
Elevate Success Instructor-led (Virtual or In-person)	• **New**—leader slides and leader guide • **New**—participant workbook and planner

Expand Success

product	update
Elevate Success Instructor-led (Virtual or In-person)	• **New**—leader slides and leader guide • **New**—participant workbook, worksheet, and planner