



Lesson Storyboard

Course Name:	CUSTOMER System User Orientation	
Lesson Name:	Overview of CUSTOMER System	
Lesson Description:	This lesson provides an overview of how CUSTOMER System was developed (By Agents for Agents), and the features and benefits of the system.	
	# of Pages in this topic	4

Screen Name	Description	Text
About CUSTOMER System	Narrator in top left of screen. Images of screens appear as he talks. Arrows point to screen elements (defined in text area).	<p>Narrator: Introducing CUSTOMER System (<i>screenshot of login screen</i>)– a new web-based agency portal that will help you sell and service clients easier. CUSTOMER System has been newly designed to help with the processes of submitting applications (<i>screen print of application screen</i>) and handling client policies (<i>screen shot of Policy Inquiry screen</i>). It's better integrated, easier to navigate, contains helpful hints (<i>screenshot stays, point to Bee Sting on screen</i>) and has overall user friendly programming. CUSTOMER System will help you do your job more simply. (<i>Text below appears across screen</i>) CUSTOMER System: Designed by Agents, for Agents, and delivered by CUSTOMER. (<i>after delay</i>)</p> <p>Narrator: Intrigued? Want to know how we did it? Click here.</p>

Designed by Agents for Agents	Narrator on screen in top left corner. Text appears across the top. Screens appear in middle, as described in text area.	<p>Narrator: CUSTOMER System was designed with you in mind. Here's how: In December, we asked agents what works and what doesn't work in the legacy systems. (<i>Image of agents working at computers. People leaning over them taking notes on clipboards</i>). We watched you at work, and found that there were many areas that we could improve on. We decided that you wanted an easier, more efficient system to help you do your job.</p> <p>(<i>Scene changes to people in a conference setting – some with pieces of logo, some talking to each other.</i>)</p> <p>We took your list of grievances to an Accelerated Solutions Environment, which was really just a conference with a cool name. Agents, Managers, Executives and a few consultants came together to determine if we could build a system that would do what you wanted it to do. (<i>one person with piece tries to match it to another person with another piece</i>).</p> <p>When you're ready to see what we did after that, let me know by clicking anywhere on the screen. (<i>After Delay</i>): Don't you want to know what happened next? <i>(After delay)</i> Come on, the suspense must be killing you! Click, please!</p>
		Narrator: After working for months to come up

	<p>with a solution, we put together a prototype to test. (<i>Image of calendar with pages flying past – to show passing of time, then logo appears, and is slightly wrong – colors don't match, a few pieces are in the wrong place</i>) We wanted to be sure we were doing exactly what you wanted!</p> <p>Then we had the portal re-tested by agents, (<i>room with agents looking over the logo, which isn't quite put together correctly. They pick up pieces and look at them, with a "hmmm" kind of face</i>) and asked again how we could improve it. (<i>people talking to each other, pointing to the pieces</i>) We received some great ideas for improvement, but mostly, (<i>one person with a happy face and ! over his head</i>) you were happy with what we had done so far.</p> <p>About about 10 months after we started out, we finally started to build the CUSTOMER System. (<i>Pieces are starting to change colors, getting closer to maroon. They are being moved around by people and are starting to take form. 1 or 2 pieces are in the wrong place</i>). As we built this new agency portal, we continued to ask agents for their feedback with every change. (<i>Agent walks into the scene, offers a few words, and walks out</i>) At times, we were rebuffed and we had to make additional improvements. (<i>After he leaves, person takes a piece and puts it in the right place</i>) But usually the responses were positive, (<i>Another agent walks in with a thumbs-</i></p>
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		<p><i>up</i>) and that's when we knew we were on the right track.</p> <p>When you're ready to find out how it all came together, click anywhere on the screen.</p> <p><i>(After delay)</i> Well? Are you going to click?</p>
		<p>Narrator: So now, we are proud to present our newest agency portal, CUSTOMER System. <i>(Final logo comes together, fades, and becomes image of CUSTOMER System home screen)</i>.The First system Developed By Agents for Agents. <i>(Flashy Designed by Agents, Delivered by CUSTOMER. like a neon sign blinking)</i> We hope you like it, and we appreciate your assistance in helping us design it!</p> <p>CUSTOMER System has some exciting new features. Click the Next button at the bottom of the screen, and I'll tell you what they are!</p> <p><i>(After delay)</i> Don't you want to see the new features?</p>
<p>Features of the CUSTOMER System</p>		<p>Narrator: CUSTOMER System isn't just terrific because it was designed by agents. It's got some great new features that will make you jump for joy because you'll have more time and energy for the things you enjoy more in life than updating</p>

		<p>an existing policy!</p> <p>Roll over each of the features below, and I'll tell you how each new enhancement will benefit you.</p> <p><i>(Animation – each feature is 1/7th of the screen. Rolling over the feature changes the narrator text to the "rollover text" in each section. When all rollovers have been completed, Narrator text changes to the final text at bottom of this section).</i></p> <p>More Integrated and a Faster System (<i>rollover text: Less time to complete an application means more time for fun activities like quoting!</i>)</p> <p>MVR/CLUE Reconciliation (<i>rollover text: No more pouring over MVR and CLUE reports. We provide them to you in an easy viewing section.</i>)</p> <p>Web-based application (<i>rollover text: Access CUSTOMER System anytime, anywhere. No downloads to your computer. Take your laptop to the beach, and complete an application while soaking up the sun!</i>)</p> <p>Batch Quoting (<i>rollover text: Need a quote for 300 current clients? Don't run 300 reports –just one will give you all the information you need!</i>)</p> <p>Intuitive System (<i>Rollover text: "Bee stings" provide help for you as needed – not that you'll need much. The system is so easy, you can be</i></p>
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		<p>up and running super quick!)</p> <p>Simplified Endorsement Process (<i>rollover text:</i> Need to add a driver? A single policy screen makes it simple to find, view and change policies.)</p> <p>Reports (<i>Rollover text:</i> Over 15 reports are available online at the touch of a button, providing you with more information than you've ever had available before.)</p> <p>Narrator: With CUSTOMER System, you save valuable time, and as a bonus, your frustration level will be lower, too. We've built the system based on your needs as an Agent. CUSTOMER System has low ramp-up time, easy access and a slew of reporting options, just like you asked. Click Next at the bottom of the screen to learn about navigating in this course.</p>
Conclusion and Navigation	Image of environment buttons as they appear in VLS screen. Animation of arrow pointing to each environment button as the narrator text about that section appears.	<p>Narrator: Ready to try it out? Click Workflows and Functions at the top of the screen to begin learning how to use system. (Workflows and Functions button highlights)</p> <p>Or, check out the newest features of the system by clicking What's New. (What's New button highlights).</p> <p>If you need to freshen up your terminology, check out some frequently asked questions about the system, or find out where to get help (just in case you need it), click the Reference button.</p>



		<p>(Reference button highlights)</p> <p>Wherever you choose to go next, we know you're going to love what we've created together!</p>
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