

CX CONFERENCE 2026 · CHARLOTTE, NC

Better customer experience, built for the industries you serve.

Services & CX Institute Guide

The Daniel Group

THEDANIELGROUP.COM

WHO WE ARE

We know your world.

For more than 35 years, The Daniel Group has helped equipment dealers, manufacturers, and transportation companies hear their customers, coach their people, and act on what they learn. If it rolls, digs, lifts, or hauls, we know your customer.

35+	1.5M+	75+	3×
Years partnering with OEMs and dealers	Customer surveys in our database	U.S.-based CX analysts	Emmy Award-winning video team

PART ONE

Feedback & Research

Find out what your customers, employees, and market are telling you.

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PART TWO

CX Institute

Build the skills to act on it, from the executive team to the frontline.

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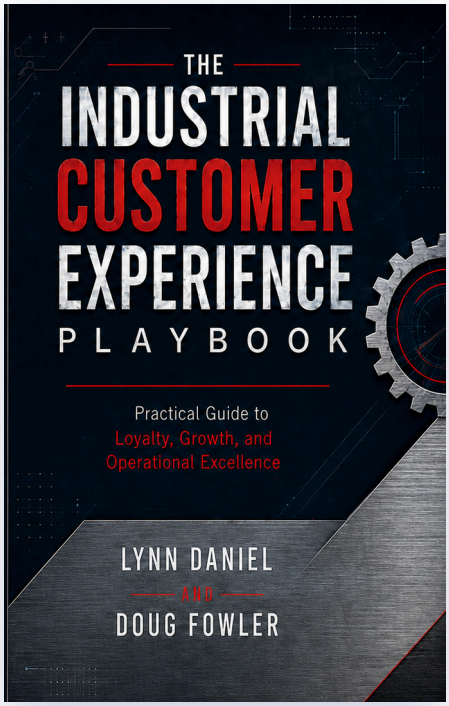
We know your customers

We talk with your customers every day and turn what they tell us into employee training and process improvement.

We know your industry

Construction, agriculture, material handling, and commercial transportation. Our work is built for B2B, not adapted from retail.

NEW FROM THE DANIEL GROUP



The Industrial Customer Experience Playbook

A Practical Guide to Loyalty, Growth, and Operational Excellence

By Lynn Daniel & Doug Fowler

Most CX books are motivational. This one is operational. Built on 35+ years of field experience and more than 1.5 million customer interviews, it's a practical guide for leaders of B2B industrial companies who need to improve the customer experience, not just measure it.

~$3M
Avg. annual spend, promoters (9–10)

$655K
Less enthusiastic customers

More than 4× the revenue. Same product, same price, different experience. TDG survey responses compared with actual invoice data.

Loyalty

What actually drives repeat business and referrals in long-cycle B2B relationships.

Growth

Turning feedback into something your sales and service teams can act on.

Operational excellence

The systems and follow-through that separate companies that close the loop from those that just survey.

Get your copy

Ask any Daniel Group team member about a copy, or scan to order: hardcover $26.99, paperback $13.99, Kindle $6.99.

FEEDBACK & RESEARCH

Customer Feedback Programs

Find out what your customers really think, and do something about it. We design, run, and manage your program, so you get answers, not just another survey tool.



Real-time dashboards

Managers see feedback as it arrives and can act before a small issue becomes a lost account.

Closed-loop follow-up

When a customer flags a problem, we help you reach back out, resolve it, and record the outcome.

Industry benchmarking

Compare your results to peers in your industry and dealer network, not just your own history.

A dedicated success manager

One person who knows your program and your goals. Not a support ticket queue.

Anytime, anywhere feedback

Phone interviews by U.S.-based analysts for high-value accounts · **Email** for reach at scale · **Text** for customers on the move · **Web link & QR code** on invoices and service follow-ups. Digital channels are a flat monthly rate, no matter how many responses you collect.

FEEDBACK & RESEARCH

Employee Feedback Programs

Your customer experience is only as strong as your employee experience. We measure the culture, leadership, and engagement that shape every customer interaction.



Engagement surveys

How connected and committed your people are, broken out by department, location, and tenure.

New hire onboarding feedback

Check-ins at 30, 60, and 90 days that catch problems before they become turnover.

Manager effectiveness

Confidential upward feedback that shows which leaders are building strong teams and who needs coaching.

Culture & values alignment

Where the culture leadership intends differs from what employees experience day to day.

Confidential by design

Results are reported in aggregate and individual responses are never shared with leadership, so you get honest data instead of filtered feedback.

FEEDBACK & RESEARCH

Market Research

Know where you stand with your own customers and against the competition. Our research is built for industrial markets where buying decisions are complex and relationships last for decades.



Competitive positioning

How customers and prospects see you compared to competitors, by segment.

Buyer journey research

Who makes the decision, what criteria matter most, and where you gain or lose influence.

Labor rate studies

See how your shop labor rates compare with your local market.

Win / loss analysis

Third-party interviews that reveal why you win the deals you win and lose the ones you lose.

Lost sales feedback

Hear from customers who bought elsewhere, while there is still time to win them back.

Voice of market

Ongoing tracking of shifting buyer priorities and competitor moves, for annual planning.

Call Monitoring & Coaching

Every call is a first impression. Send us your recorded calls. Our CX experts grade each one against your own scorecard and show you exactly where your team shines and where it can grow. No new phone system or software required.



1. **Send**
   Share your recorded calls securely.

2. **Grade**
   Trained analysts score each call against criteria built around your business, with written comments on every call.

3. **Grow**
   Monthly scorecards and trends by rep and team, plus coaching priorities: who needs help, and on what.

Optional add-ons

AI Interactive Training: practice conversations reps can run anytime, with instant feedback. **Phone Coaching:** one-on-one sessions built on your team's own graded calls.

NEW FROM THE DANIEL GROUP

CX by Design

Every touch point, designed on purpose.

CX by Design is our playbook for heavy equipment, material handling, ag, and transportation dealers. It defines what customers see, where they go, and what your people say at every moment, including when things go wrong.

The problem

Dealer customers don't leave over one bad day. They leave after the third unreturned call, the second missed promise date, or the visit where nobody knew which building handled parts. Most dealers leave these moments to whoever happens to be standing at the counter. When parts, service, sales, and rental sit behind different doors, the gaps multiply, and every one of them costs the customer uptime.

WHAT IT COVERS: FROM THE ROAD SIGN TO THE 30-DAY FOLLOW-UP CALL

The campus	Parking, color-coded wayfinding, door and counter signs, desk placement, lobby displays
The phone	Call routing, a machine-down line, holds, warm transfers, callbacks, after-hours
Parts, service, sales & rental	Step-by-step flows and scripts for each department, with built-in "what if" answers
Delivery & field service	Scheduling calls, driver standards, on-site handover
Long lead times	Update schedules, honest date language, options to cut downtime, a strict no-blame rule
When things go wrong	A five-step recovery framework, with frontline authority to make it right on the spot
Online orders	Fast human follow-up on orders from OEM portals the dealer doesn't control

HOW IT WORKS

Twelve weeks from baseline to a measured, coached experience.

1 — Assess
Weeks 1–4
Mystery shops, campus walk, call data, and a customer survey

→

2 — Design
Weeks 3–10
Signs, maps, counters, phone routing, and department scripts

→

3 — Train
Weeks 6–12
Managers first, then every employee, with what-if role-play

→

4 — Measure & coach
Week 12 onward
Weekly scorecard, surveys, and quarterly mystery shops

↺ What we learn in phase 4 updates the playbook

WHAT DEALERS GET

A customer who is never lost, never left waiting, and never surprised

Five promises every employee keeps, at every door.

A front line that knows what to say

Ready-to-use scripts for every department, with answers for the hard moments: backorders, slipped dates, angry customers, mistakes.

Trust that survives long lead times

Customers hear from you on a set schedule, so silence never becomes the message.

Results you can see

A weekly scorecard, surveys tied to every transaction, and quarterly mystery shops show whether the experience is actually delivered.

Built for the realities of dealer life

Separate buildings, long factory lead times, parts shortages, and websites you don't control are the starting point, not an afterthought.

Talk with us about CX by Design

877-967-4242 · info@thedanielgroup.com · thedanielgroup.com



CX Institute
The Daniel Group

CX Education
Course Catalog

Helping Humans, Human Better

Data doesn't improve the customer experience. People do. Every course is built on 35 years of B2B customer research, and every one can be branded for your company.

EXECUTIVE TEAMS | PROGRAM LEADERS | FRONTLINE MANAGERS | CUSTOMER-FACING TEAMS

NEW HIRES | MICRO-LEARNING | CUSTOMER SPOTLIGHTS

Course Selection



A customer-focused culture is built at every level, with your customers at the top and your executive team as the foundation. Custom courses and customer spotlights (08) support every level.

01 **CX for Executive Teams** P. 12
Set the strategy, governance, and twelve-month goals for your CX program.

02 **CX Program Leader Certification: Intro** P. 13
Build a complete CX strategy and the skills to lead it.

03 **CX Program Leader Certification: Advanced** P. 14
Engage the whole enterprise, employees and customers alike.

04 **Frontline Manager Course** P. 15
Coach teams with their own customer data.

05 **CX for Customer-Facing Teams** P. 16
Train your trainers to deliver a frontline CX session.

06 **New Hire Onboarding** P. 17
Connect every new employee to your customers from day one.

07 **Micro-Learning Library** P. 18
Six interactive modules under 20 minutes, for parts, service, rental, and store teams.

08 **Customer Spotlights & Custom Courses** P. 22
Customer videos and programs built around your goals.

COURSE 01 · FOR SENIOR LEADERSHIP

CX for Executive Teams

Give your senior team a well-defined strategic direction for your customer experience program, and train your executives on the most effective ways to oversee the entire CX initiative. You leave the workshop with goals and objectives for the next twelve months.

FORMAT	LENGTH	GROUP	MATERIALS
In-person workshop	**1 day**	**Up to 20**	**Presentation & workbooks**

WHAT YOU'LL COVER

- Purpose of CX
- Goals & governance
- Customer listening
- Employee engagement
- Analytics & continuous improvement
- Closing the loop

HOW IT WORKS

This one-day, in-person session combines self-reflection with group interaction. A presentation and workbooks guide your team through a complete strategy-building experience.

You leave with

A CX strategy your leadership team agrees on, with goals and objectives for the next twelve months.

Investment for every CX Institute course is listed on page 23.

COURSE 02 · FOR THE PERSON RUNNING YOUR CX PROGRAM

CX Program Leader Certification: Intro

Learn how to develop a complete CX strategy, audit customer touchpoints, engage frontline team members, analyze customer feedback, foster a customer-centric culture, and drive continuous improvement across your organization.

FORMAT	LENGTH	GROUP	LOCATION
Workshop + virtual follow-up	**2 days**	**Up to 10**	**Selected by TDG**

WHAT YOU'LL COVER

- What CX is & why it matters
- Current program assessment
- Develop or refine your CX strategy
- How to engage the frontline
- Audit customer touchpoints
- Using tools for CX success
- Analyze feedback to drive improvements

HOW IT WORKS

The workshop starts with pre-work that assesses your current program. In the classroom, we combine individual reflection, small-group work, and group discussion, supported by a presentation and workbooks. A virtual follow-up keeps your plan moving after you return.

You leave with

Certification, an assessment of your current program, and a CX strategy you can put to work.

Investment for every CX Institute course is listed on page 23.

COURSE 03 · FOR CERTIFIED PROGRAM LEADERS

CX Program Leader Certification: Advanced

Builds on the Intro certification with new strategies and tactics to engage the entire enterprise: your employees (EX) as well as the customers you serve (CX). You leave with new ways to engage, inform, coach, and motivate the people around you.

FORMAT	LENGTH	GROUP	BUILDS ON
Workshop + virtual follow-up	**2 days**	**Up to 10**	**Intro certification**

WHAT YOU'LL COVER

- Advanced CX & EX engagement strategies
- Phone system & call-handling design
- Onboarding that shapes CX success
- Storytelling to inspire action
- Coaching to drive team alignment
- Connecting employee actions to CX outcomes

HOW IT WORKS

Like the Intro course, it starts with pre-work and combines individual reflection, small-group work, and group discussion, supported by a presentation and workbooks, with a virtual follow-up afterward.

You leave with

Advanced certification and a plan to bring your whole organization into the CX effort.

Investment for every CX Institute course is listed on page 23.

COURSE 04 · FOR SUPERVISORS OF CUSTOMER-FACING TEAMS

Frontline Manager Course

An engaging, interactive classroom experience that gives managers the tools to build lasting customer loyalty through their teams. We show them how to analyze their data, make follow-up calls to customers to uncover the reasons behind their scores, and build empathy within their team.

FORMAT	LENGTH	GROUP	STYLE
In-person, at your location	**Half day or full day**	**Up to 20**	**Highly interactive**

WHAT YOU'LL COVER

- Why CX sets you apart
- How CX is measured
- Identifying & rewarding great CX
- Communication quality with customers
- Managing customers in the middle
- Accountability for results
- Group feedback analysis & action plan
- Building a strong CX culture

HOW IT WORKS

A balanced mix of short lectures, self-reflection, breakout sessions, room discussion, and role-playing, held at your location so managers can apply it to their own branch and their own data.

You leave with

A group feedback action plan and the skills to coach their teams with it.

Investment for every CX Institute course is listed on page 23.

COURSE 05 · TRAIN-THE-TRAINER

CX for Customer-Facing Teams

Already have a training department? This course gives your trainers the tools and documentation to deliver a high-quality, two-hour customer experience session to your frontline employees, tailored to your industry and based on your customers' actual feedback.

FORMAT	LENGTH	GROUP	DELIVERS
Train-the-trainer workshop	**2 days**	**Up to 5 trainers**	**2-hour frontline session**

WHAT YOU'LL COVER

- Understanding customer experience
- The CX ecosystem
- Communication: the cornerstone of great CX
- Setting expectations
- Managing difficult situations

HOW IT WORKS

Over two days, your trainers get the core knowledge, a ready-to-use presentation, and a digital workbook. They finish by practicing the session in a sample class alongside a member of our team.

You leave with

Trainers who are ready to run the session themselves, as often as you need it.

Investment for every CX Institute course is listed on page 23.

COURSE 06 · FOR EVERY NEW EMPLOYEE

New Hire Onboarding

Immerse new hires in your customers' real experiences from the very start. Using your actual customer feedback, this fast-paced, interactive session tells powerful stories that connect head, heart, and hands, so new employees join with a clear sense of purpose, empathy, and accountability.

FORMAT	LENGTH	BRANDING	INCLUDES
Live virtual or prerecorded	**30 minutes**	**Custom to your company**	**One revision**

WHAT YOU'LL COVER

- Emotional connection to CX goals
- Interactive mobile activity
- Q&A for reflection and clarity
- Live or prerecorded delivery
- Builds team culture and accountability
- Real customer stories and feedback

HOW IT WORKS

Run it as a live virtual session or use a prerecorded version your new hires can watch on their own schedule. Every session is branded for your company.

You leave with

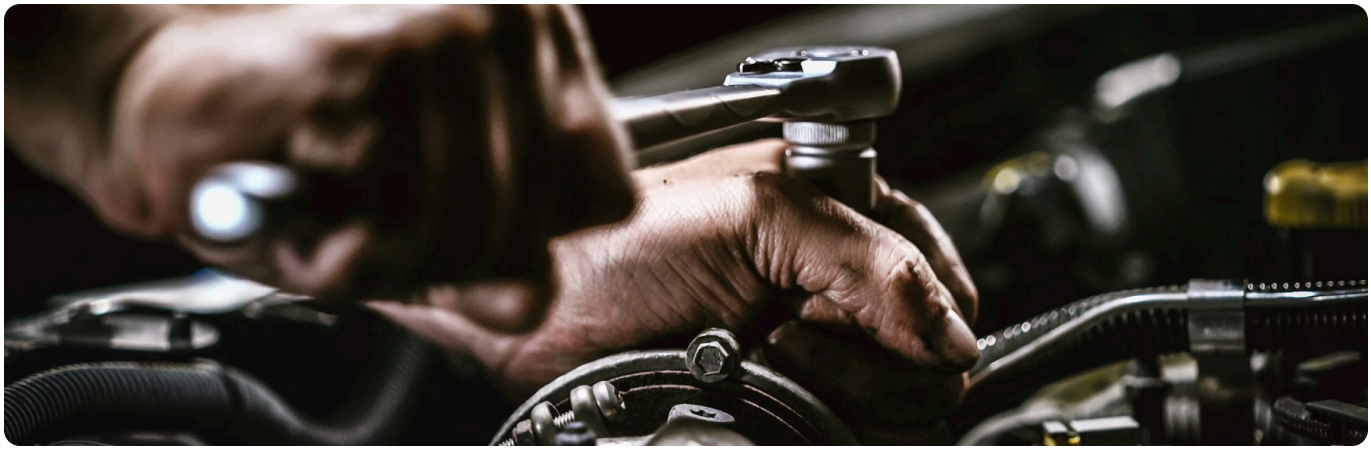
New employees who understand who your customers are and why their role matters from day one.

Investment for every CX Institute course is listed on page 23.

COURSE 07 · MICRO-LEARNING LIBRARY

Training that fits in a break.

You can't engage today's employees with traditional formats alone. Our award-winning micro-learning team builds short, interactive modules that put employees in their customer's shoes, when, where, and how they want to learn.



LENGTH	DEVICES	DELIVERY	FILES
Under 20 minutes	**Phone, tablet & PC**	**Your LMS or ours**	**HTML5 or SCORM**

EVERY MODULE

- Shows real customer situations and emotions
- Builds empathy in dealer employees
- Uses a "choose your path" interactive format
- Follows actual customer journeys
- Fits any role or schedule
- Is ideal for new hires in their first weeks

HOW IT WORKS

Each module is self-contained and easy to deliver through your learning management system or ours. Employees can take it on any device, and they get a certificate they can print or share when they finish.

Make it yours

Every module can be modified and branded for your company at no charge. Custom course builds are welcome.

MODULE 01

Ultimate Call Handling

AUDIENCE	LENGTH	INCLUDES
Parts counter pros	**10–15 minutes**	**Live call simulator**

About 90 cents of every dollar your organization earns at the parts counter starts with a phone call. Whether they're a 20-year parts pro or brand new, today's call-in customers need excellent call handling to stay loyal and spend more. The module ends with a live simulation of a customer calling in.

How to use it: Assign to new and experienced parts counter staff. Practical how-tos for handling calls, showing empathy, and making warm transfers, plus a live simulator to put the skills to work.

MODULE 02

Parts Counter Reps: Your Customer's Journey

AUDIENCE	LENGTH	DELIVERY
Parts counter reps	**Under 20 minutes**	**HTML5 or SCORM**

Very few customers call or walk in because everything is going great. They have a need, and often an unplanned one. Your parts reps experience everything that customer has to navigate and the hard decisions they face, and learn to empathize as they serve.

How to use it: Built for new and experienced parts counter staff. It puts the spotlight on the customer and everything they face during downtime.

MODULE 03

Field Techs: Your Customer’s Journey

AUDIENCE	LENGTH	DELIVERY
Field techs & service advisors	**Under 20 minutes**	**HTML5 or SCORM**

Across more than 1.5 million customer surveys in our database, one element has the biggest impact on the customer experience: communication. This module teaches field techs and service advisors why it matters, not just how, and what their customer is dealing with during downtime.

How to use it: Assign to new and experienced field techs and service advisors, especially if you want to raise your field service scores.

MODULE 04

Shop Service Techs: Your Customer’s Journey

AUDIENCE	LENGTH	DELIVERY
Shop techs & service advisors	**Under 20 minutes**	**HTML5 or SCORM**

The same lesson for the shop: communication matters most. Shop techs and service advisors finish with a real understanding of their customer’s situation while a machine is down, and why updates make all the difference.

How to use it: Assign to new and experienced shop techs and service advisors. It shows the tough decisions customers make while they wait for their machine.

MODULE 05

Rental Reps: Your Customer’s Journey

AUDIENCE	LENGTH	DELIVERY
Rental representatives	**Under 20 minutes**	**HTML5 or SCORM**

Rental customers have choices about where to do business. Speed, accuracy, genuine care, and equipment knowledge are the minimum. In under 20 minutes, rental reps gain real insight into this customer and how to serve them.

How to use it: Assign to new and experienced rental reps. Practical how-tos for customer handling, service, and empathy that set your team apart.

MODULE 06

Walk-In Customer Prep

AUDIENCE	LENGTH	DELIVERY
Parts, rental & store operations	**Under 20 minutes**	**HTML5 or SCORM**

Big retail brands have in-store experience standards. This short course is built for every industrial store operator who wants to meet or beat them. Your team sees the store through the customer’s eyes on a first visit and learns what earns a return visit.

How to use it: Assign to new and experienced parts, rental, and store teams. They learn the specific steps for every walk-in customer and can use them immediately.

COURSE 08 · VIDEO & CUSTOM WORK

Made for your company.



Customer Spotlights

We film a "Day in the Dirt" with your customers, at their job sites or a location you choose, to show the realities, challenges, and culture of the people you serve. Use the videos to train your teams and celebrate your customers, inside and outside the company.

FORMAT	TEAM	USE	EQUIPMENT
On-site video production	**3× Emmy Award-winning**	**Internal & external**	**Broadcast cameras & lighting**

- A firsthand view of customer realities
- Builds empathy and connection
- Ride-alongs reveal new insights
- Strengthens a customer-focused culture

Custom Courses & Consulting

Work with our team to design a program around your goals, your audience, and your customer story. We can rebuild one of our existing courses or modules around your customers, roles, and brand, or create something entirely new.

- Vulnerable customer training
- Process evaluation & improvement
- Targeted consulting using AI
- Journey mapping
- Customer-centric sales

Investment at a glance

COURSE	FORMAT	LENGTH	INVESTMENT
WORKSHOPS & CERTIFICATIONS			
CX for Executive Teams	In-person, up to 20	1 day	**$6,500**
Program Leader Certification: Intro	Workshop + virtual, up to 10	2 days	**$3,200**
Program Leader Certification: Advanced	Workshop + virtual, up to 10	2 days	**$3,400**
Frontline Manager Course	At your location, up to 20	Half day Full day	**$4,500** **$7,000**
CX for Customer-Facing Teams	Train-the-trainer, up to 5	2 days	**$13,000**
New Hire Onboarding	Live virtual session Prerecorded Custom branding setup	30 min	**$250 / session** **$3,000 / year** **$500 one-time**
MICRO-LEARNING LIBRARY			
Customer Journey modules Field, Rental, Parts, Shop	HTML5 or SCORM	< 20 min	**$6,500 each**
Ultimate Call Handling	HTML5 or SCORM	10–15 min	**$3,500**
Walk-In Customer Prep	HTML5 or SCORM	< 20 min	**$2,500**
VIDEO & CONSULTING			
Customer Spotlights	On-site video production	—	**Based on scope**
Custom Courses & Consulting	Tailored to your goals	—	**Based on scope**

Workshop fees exclude travel and accommodation. Program Leader Certifications are held at a location selected by The Daniel Group. Micro-learning: bundle discounts when two or more modules are purchased; annual renewals from $350–$750 per module. Customer feedback, employee feedback, research, and call monitoring programs are quoted to your scope.

Thank you.

Helping Humans, Human Better

STEP 1

Talk with us

A free 30-minute conversation about your goals and your customers.

STEP 2

Get a plan

The right mix of feedback, design, and training for where you are now.

STEP 3

See results

Most feedback clients see actionable data within 30 to 60 days of launch.

SCAN TO TALK WITH OUR TEAM

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