SGC TECH AI

The CES Role

Customer Experience Specialist — the L1 entry role at SGC. A deep dive into your responsibilities, daily workflow, the 10-day cycle structure, and the performance expectations that define success.

ROLE DEFINITION

What Is a Customer Experience Specialist?

The CES (Customer Experience Specialist) is the entry-level L1 role at SGC. You are the first professional voice a prospect hears and the person who turns research into qualified meetings. The role blends sales development fundamentals with the structured discipline of the CES evaluation system.

> **One-sentence job:** generate verifiable, qualified opportunities by executing the daily system — research, outreach, follow-up — with total CRM discipline.

Core Responsibilities

- **Prospect research** — build intelligence before every touch: company context, decision-maker, pain, and trigger events.
- **Value-driven outreach** — execute the playbook's openers and scripts across phone, email, and LinkedIn.
- **Discovery** — run the structured question framework to uncover pain, budget, authority, need, and timeline.
- **CRM discipline** — every touch logged, every next step scheduled, every result recorded. The CRM is your single source of truth.
- **Continuous evaluation** — complete CES assessments and use feedback to tighten your conversations.

DAILY WORKFLOW

The CES Daily System

Your day is built in blocks. Each block has one job. When you string them together, you generate a predictable pipeline.

Research Block

Morning: prepare intelligence for today's outreach targets. One-page briefs, not notes. Who, what they care about, what changed.

Outreach Block

Execute value-driven touches using the openers and scripts. Log each touch in the CRM immediately.

Follow-Up Block

Handle scheduled follow-ups first — persistence closes deals. Never let a warm thread go cold.

Review Block

End of day: update the pipeline, log outcomes, score your own calls against the script, plan tomorrow.

> **Cadence:** research → outreach → follow-up → review, five days a week. The system, executed daily, is the job.

Performance Expectations (L1)

- Meet the minimum touch and meeting-booking targets every week.
- Complete research briefs for every scheduled touch.
- Log 100% of activity in the CRM — unlogged work does not count.
- Hold discovery-to-meeting conversion at or above the L1 bar.

THE 10-DAY CYCLE

Structuring Your First Two Weeks

The 10-day cycle is the onboarding rhythm for every new CES hire. It takes you from zero to live execution with an assessment gate at the end.

D1–2	D3–4	D5–6	D7–8	D9–10
Foundation: product, playbook, CES	Script: openers, questions, objections	Practice: roleplay full conversation	Live: supervised research + outreach	Assessment + live execution

Day 1 Written Assessment

Day 1 closes with the written assessment covering CES concepts and role fundamentals. **Pass mark: 70%.** The assessment is a gate, not a formality — it verifies you can speak the framework before you take it to prospects.

Roleplay the Full Conversation

- Value opener → discovery questions → presentation → objection handling → close.
- Run it against the gatekeeper script and the live prospect script.
- Your assessor scores against the same rubric as your live calls.