

When you see **[next]**, press **ENTER** or the **→** arrow to go forward; or **←** to go back

Online case study: Troubleshooting Customer Calls

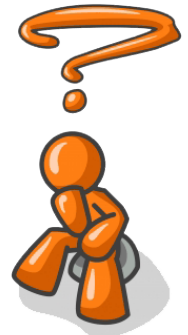


This case is designed to prompt your thinking about good design, engage you in critiquing an existing unit of instruction, and prepare you for upcoming activities. **[next]**

As you review the case, think about ... how and why the instruction was designed the way it appears ... how well you believe the instructional unit will be in facilitating the expected learning outcomes and, ... what you might do to enhance the instruction. *It is a good idea to write down your thoughts as your review the case...* **[next]**

More specifically, think about ...

- Is this instruction designed well? Why or why not?
- What are the strengths of this design?
- What are the weaknesses?
- What issues might you anticipate, given the expected learning outcomes and activities, in the instruction?
- If you had the authority and resources to modify this instruction... what will you suggest? **[next]**



Title: Troubleshooting Customer Calls

Estimated Time: 90 min

Purpose: Introductory session for new customer service representative



Context: This is an introductory training session for new CSRs. It is the only formal training they will attend on *working with customer calls*. The remainder of their training will be on the job with CSR coaches. Earlier they received training on the telephone system. **[next]**



Overview: This storyboard presents the flow of activities for a 90-minute customer service representative (CSR) training session on troubleshooting customer service calls. The session includes... *presentation*... *demonstration*... *debrief*.

The *presentation* describes customer service call procedures. This is followed by a *demonstration* video showing a best practices scenario of an experienced CSR resolving a caller's problem and correctly referring the caller to the appropriate technician. The facilitator walks through each step taken during the scenario while attendees take notes. The session ends with a *debrief* of the presentation and demo. **[next]**

Expected outcomes: New CSR will be able to identify the customer's problem and the correct technician (100% of the time) to resolve the problem during the troubleshooting call, and successfully transfer the caller to this technician. **[next]**

Resources: Facilitator presentation materials, demonstration video and facilitator notes/guidelines for discussions, Audience note books/pens.

Facilities: Training room for 25, projector for presentations/videos.

Stakeholders: *Facilitator*-trainer for new customer service reps; *Audience*-new customer service representative attending orientation (who completed phone training). **[next]**



Title: Troubleshooting Customer Calls

Estimated Time: 90 min

Purpose: Introductory session for new customer service representative

Flow of lesson: The flow of activities for a 90-minute training session includes... presentation... demonstration... debrief. **[next]**



- Call procedures overview
- Technical support types and referral guidelines
- Common technical support issues for products

- Customer Service Call procedures
- Technician identification and referral

- Call procedures, Technical support types, technician referrals key points
- Call procedures, Technical support types, technician referrals questions

Let's take a look at the storyboard for this instruction. **[next]**

Course title: **Troubleshooting Customer Calls**

Activity Title: **Introductory Presentation**

Estimated Time: **30 min**

What do you notice about this storyboard screen... the activities, learning outcomes, resources, type of facilitator and learner interactions? **[next]**



Instructional Activity Description:

- Lecture/Discussion on typical customer calls
- Overview of call procedures (question protocol) using phone system
- Overview of technical support types / technician specialties
- Overview of common technical support issues
- Successful calls

Activity Deliverables/Outcomes:

- Learners notes on lecture

Resources Required:

- Presentation, with video clips embedded in the presentation
- Presentation script for facilitator with info on technical problems associated with technician specialists
- Note pages for audience members

Notes:

- Overview of procedures (opening the call, asking questions, resolving/transferring, closing the call)
- Short videos of successful customer service call (CSR in action) pointing out each phase of the procedure
- Facilitator use a list of prompting questions to ask learners what they thought about each procedures in the videos and what they noticed about the CSR behaviors. **[next]**

Key learning outcomes:

- Learners will be able to identify the customer's problem and the correct technician (100% of the time) to resolve the problem during the troubleshooting call.

Key Content Points:

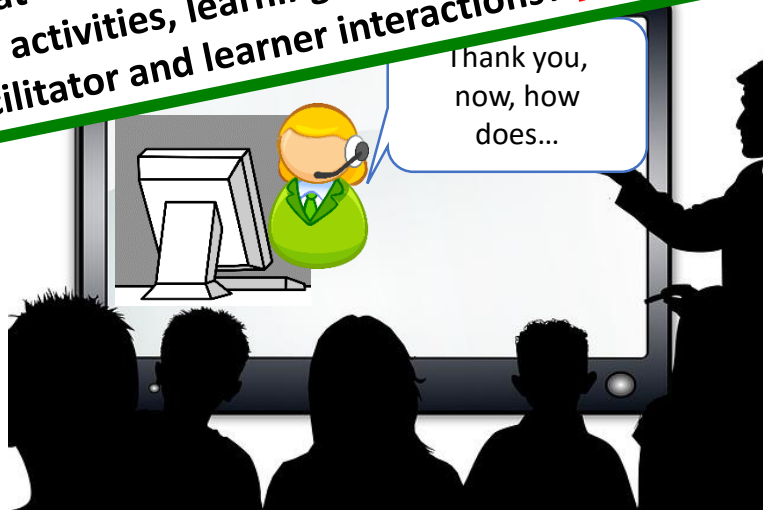
- Call procedures and CSR behaviors
- Technical support types
- Technician specialties (aligned with support types)
- Common technical support issues for products

Course title: **Troubleshooting Customer Calls**

Activity Title: **Demo of system walk through**

Estimated Time: **30 min**

What do you notice about this storyboard screen... the activities, learning outcomes, resources, type of facilitator and learner interactions? [next]



Instructional Activity Description:

- Demonstration on best practices CSR call
- Discussion of procedures
 - Facilitator led Q/A

Activity Deliverables/Outcomes:

- Learners notes
- Learner responses to scenario questions

Resources Required:

- Presentation
- Facilitator – list of video overview points, questions for learners

Notes:

- One demonstration video of best practices in CSR call, facilitator pauses video at key points for discussion and questions / answers
- Facilitator points out key procedures and practices during the video, refers back to key points in previous presentation
- Then, facilitator scaffolds discussions to review procedures to engage learners in deconstructing and describing successful best practices [next]

Key learning outcomes:

- Learners will be able to describe best practices in CSR troubleshooting calls.

Key Content Points:

- Customer Service Call procedures and behaviors
- Technical support types and technician referrals
- Common technical support issues for products

Course title: **Troubleshooting Customer Calls**

Activity Title: **Debrief Demo**

Estimated Time: **30 min**

What do you notice about this storyboard screen... the activities, learning outcomes, resources, type of facilitator and learner interactions? **[next]**



Instructional Activity Description:

- Learners share thoughts, experiences, questions about demo
- Facilitator adds comments and prompts all to participate

Activity Deliverables/Outcomes:

- None

Resources Required:

- Debrief guide for facilitator

Notes:

- Facilitator uses a Debrief Guide and list of questions about the presentation/demo to engage audience is summary of the session
- Learners use their notes from introduction and demo
- Facilitator responds to questions **[next]**

Key learning outcomes:

- Learners will be able to identify the customer's problem (100% of the time) during the troubleshooting call.
- Learners will be able to identify accurately which technical support person customers should be transferred to during troubleshooting phone calls.
- Learners will be able to successfully transfer the caller to the correct technician.

Key Content Points:

- Customer Service Call procedures
- Technical support types and technician referrals

Title: Troubleshooting Customer Calls

Estimated Time: 90 min

Purpose: Introductory session for new customer service representative

Questions: [next]

- Does this case seem familiar to you in your experiences in design, teaching, and/or learning? How?
- Overall, is this instruction designed well? Why or why not?
- What are the strengths of this design?
- What are the weaknesses?
- What issues might you anticipate, given the expected learning outcomes and activities, in the instruction?
- If you had the authority and resources to modify this instruction... what would you do?
- How might this case help you with this course?



Think about these questions and develop written responses ... for an upcoming discussion. [done]

