



SmartPay Customer Care Tier I New Hire Training

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Welcome to StatesideBPO!

It's exciting to start a new job and we are delighted to have you join our StatesideBPO family. By joining our family, *Training & Development* will teach you the tools needed to be successful as a Customer Service Specialist. We strive to make learning fun and interactive! Your professional growth is of utmost importance to us!



Training Course Introduction

This is the StatesideBPO Facilitator Guide for Vivint's New Hire Training for Customer Care. At Vivint the goal is to help customers create a smarter home with intelligently designed products that simplify their life.

We create simple, affordable smart home solutions

As a leading smart home technology provider, Vivint offers home security, energy management, home automation, local cloud storage, and high-speed internet solutions to more than one million customers throughout the United States, Canada and New Zealand. The smart home solution saves customers time and money and ultimately simplifies their life.

The StatesideBPO Vivint New Hire Customer Care training course consists of focusing on customer account maintenance and billing and payments. Customer Care Specialists focus on the following Tier 1 – SmartPay support:

- Updating basic account maintenance such as their email address, billing address, telephone number, emergency contact.
- Assisting with billing inquiries such as
 - Why is my bill higher than usual?
 - When does my contract end?
 - Can you change my billing date?
 - How can I change my service package?
 - How much a month do I pay in taxes?
 - When was the last time I made a payment?
 - How can I check my invoice online?
 - How can I make a payment online?

StatesideBPO has designed a 10-day training course to effectively prepare StatesideBPO Customer Care Specialists to provide Tier 1 (SmartPay) level of support to customers. It is designed with 10-day course filled with virtual instruction, skills and knowledge development, self-paced and group activities. After graduation, trainees transition into Production using a phrase called Nesting. Nesting is designed to provide recently graduated Customer Care Specialists additional support to answer live calls.

The Tier I: SmartPay course is designed as a blended curriculum with the following modality mix:

- Virtual Instructor Led Training
- Self-paced activities and videos
- Large and small group activities
- Call practice sessions using live call observation with seasoned agents; and hot seat activities with one learner demonstrating call handling and system navigation skills in front of the class
- Live call sessions with QA Monitoring

Performance Measurement Strategy:

- Polling. Instructors use the Adobe Connect Polling feature for confidence checks and knowledge assessments throughout the course.
- Performance Rubrics. A three-level evaluation rubric is used throughout the course for peer-to-peer evaluations in group activities. The three levels of evaluation are: Mets, Partially Mets and Did Not Meet. The evaluations focus on peer observation in the areas of system, process, tools, skills, and behaviour. These Rubrics will be in the Participant Guides and the instructor will need to build out the polls to support the inputs that peer observers will complete online after each observation. Peer observation and evaluation is a powerful learning tool that builds awareness of the important performance areas for the job in an informal manner. The instructor uses these Rubric results to gauge individual learner performance.
- Live Call Quality Monitors. During live call sessions, QA resources will use the actual QA monitor form to evaluate learner call performance and provide feedback. This performance data will be used to obtain the out-of-training baseline metrics for the learner to track overall time to proficiency on the job.

Meet the Training Team!

Marie Cucchiaro

VP of Client Services, Training & Development

Work: (239) 233-6449 | Email: mcucchiaro@statesidebpo.com

A dynamic leader, Marie is experienced with helping teams develop successful solutions aligned with organizational goals. Her career has been focused on contact center management, consulting, system integrations, distance learning, and recruiting. She currently uses this extensive experience as our VP of Client Strategies and Services. Prior to joining StatesideBPO she oversaw operations, quality assurance, and business process improvement for a wide range of clientele, including eight Fortune 500 companies.



Janelle Faison

Manager, Training & Development

Work: (239) 449-9048 | Email: jfaison@statesidebpo.com

As the Manager of Training and Development, Janelle brings over 17 years of call center, instructional/eLearning design, and management experience. Janelle earned her Associate's degree in Accounting from Florida Metropolitan University. Additionally, she has completed 25 hours of Bergerac Training, attended seminars such as Being a Creative Trainer and Emotional Intelligence. Her teaching style is best known for being creative, attentive, and realistic.



Stephanie Perez

Associate Trainer I

Work: (239) 220- 5218 | Email: smperez@statesidebpo.com

Stephanie Perez is a technical-minded professional with an eye for innovation. Her passion for information technology, design, and personal development has helped her excel with StatesideBPO. She is in the progress of obtaining her Bachelor's in Web Design & Development at Full Sail University with a focus on Creative Presentation to improve the quality of Training. When she's not leading a class she enjoys her time off entertaining her vast audience with her live competitive game plays.



Angela Cook

Associate Trainer I

Work: (239) 214-6638 | Email: acook@statesidebpo.com



Angela Cook's experience in the call center industry began in 2014 where she started in Operations and most recently transitioned into supporting our training efforts as a trainer. Being a native Oklahoman, she received a BBA in Marketing from the University of Central Oklahoma with a focus in professional sales. Thru her education and professional experience, she has been able to communicate with a broad range of audiences and learning styles. Angela captivates her classrooms with her energy, experience, and engagement. Angela fuels her deep passion for her clients and customers everyday as she presents new and challenging information.

Devin Dornbos

Associate Trainer I

Work: (239) 214-6251 | Email: ddornbos@statesidebpo.com

Devin Dornbos is StatesideBPO's newest Trainer associate. Devin has had over 3 years of technical support experience ranging from phone support, training and management. Before he found his calling as a trainer he was studying theater in southern California where he was born and raised. After a few years of live theater and stand up performances he moved to south west Florida to be closer to relatives. His hobbies include comedy, the Philadelphia eagles and technology. He is happy to be a part of StatesideBPO's family and eagerly looks forward to meeting you all!



Learning & Development Philosophy

All persons here are of equal worth and value; all opinions are valued and needed.



Learn by Doing

People retain knowledge and skills if they have immediate and repeated opportunities to practice what is learned. Complete your skill development exercises after each module.

Learning by Layering

We believe in layering information – basic information first, followed by exercises and experiences to apply the information through role-play and practice in the application.

Participate

If you tend to be quiet in group situations, work on increasing your contributions – we are here to learn from one another. On the other hand, avoid monopolizing the discussion by talking too much or too long.

Express your needs and expectations constructively

Let us know what you need and expect. Please do it in a way that maximizes the possibility that people will hear you and respond.

Ask questions

Asking questions are a great way to learn; it is not a sign of weakness. Help create an atmosphere where it is easy for everyone to ask questions.

Extend yourself, take risks and make mistakes in pursuit of learning

Learning does not happen if you do not take risks and make mistakes.

Give feedback in an honest way that helps others.

Please speak in “I” terms: “I think; I feel; I believe; It’s been my experience that.”

Receive feedback from others, try to understand not defend.

Take responsibility for moving the group forward. Enjoy and have fun.

Trainee Agenda

An agenda is an organized description of activities and resources to guide a trainee toward a specific learning objective. The Trainee Agenda provide the topic, learning objective and the duration. A learning objective is a statement that the trainee learns during that topic. The duration helps the trainee identify the length of time dedicated to the topic.

Day	Topic	Learning Objectives	Duration
1	Welcome & Trainer Introduction	Welcome all trainees in a safe and supportive environment Provide trainees with Trainer contact information	5 mins
	Meet & Greet: Training & Development Manager	<ul style="list-style-type: none"> ▪ Basic introduction (including name, title, description of duties) ▪ Explain how Training & Development Manager interacts with Customer Care Specialists ▪ Discuss Training Scorecard ▪ Q & A session ▪ Janelle Faison, Training & Development Manager (jfaison@statesidebpo.com) 	30 mins
	Virtual Classroom	<ul style="list-style-type: none"> ▪ Recognize when the audio and microphone are active or inactive ▪ Acknowledge a screen share request ▪ Send the host a private message ▪ Change agent statuses ▪ Using the audio wizard ▪ Enlarging the virtual classroom during live demonstrations ▪ Explain that being non-responsive may cause a trainee to be removed from the room 	30 mins
	Icebreaker & Trainee Introductions	<ul style="list-style-type: none"> ▪ Fun and engaging activity to get to know the trainees 	30 mins
	Meet & Greet: HR Generalist	<ul style="list-style-type: none"> ▪ Discuss Paylocity ▪ Process for first check ▪ Signing up for Benefits ▪ Joni Blanchard, HR Generalist (jblanchard@statesidebpo.com) 	20 mins
	Stateside Portal	<ul style="list-style-type: none"> ▪ Log into the portal ▪ Edit profile information ▪ Request access to a group ▪ Review shining stars ▪ Start or respond to a discussion ▪ Add friends ▪ Locate Vivint specific training content 	45 mins
	Practice		15 mins
	Break		15 mins

Information Privacy and Security	<ul style="list-style-type: none"> Introduces computer security policies of StatesideBPO Protecting customer's personal information Defines HIPPA and PHI 	5 mins
Information Privacy and Security Compliance Assessment	<ul style="list-style-type: none"> Gauge the trainee's ability to retain Stateside policies 	15 mins
Training Expectations	<ul style="list-style-type: none"> Discover the Learning & Development Philosophy Have a clear understanding of StatesideBPO's expectations while completing training Learn techniques to create and maintain a positive learning environment Explain the purpose of this training class is NOT to teach computer skills but teaches Vivint specific content that prepares the trainees to be successful at handling calls. 	45 mins
Test Score & Acknowledgement Form	<ul style="list-style-type: none"> Explain the training course expectation as it relates to polling, self-study assessment, daily quizzes, final exam and certification 	5 mins
Training Acknowledgement Form	<ul style="list-style-type: none"> Obtain commitment from the trainee that training is their primary focus during working hours 	5 mins
StatesideBPO History	<ul style="list-style-type: none"> The date that Stateside was started Provide StatesideBPO history, mission and organizational goal State the CEO of StatesideBPO 	15 mins
Lunch		60 mins
Daily Tools	<ul style="list-style-type: none"> Explain basic definition of each programs. Tips to log into each system successfully. 	10 mins
Break		15 mins
Team Viewer	<ul style="list-style-type: none"> Install Team Viewer and pin program to desktop Locate the ID and password 	20 mins
Call Demonstration	<ul style="list-style-type: none"> Introduction of call center life and Vivint call types using live call recordings 	60 mins
Recap & Check	<ul style="list-style-type: none"> Check that tools are installed properly Verify that USB headset are functioning Confirm WI-FI has been disabled 	15 mins

	Employee Referral Program		
	Survey	Complete a survey to assess the effectiveness of the training	10 mins
	Total		510 mins

Day	Topic	Learning Objectives	Duration
2	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal and Rackspace. 	15 mins
	Knowledge Check Day 2	<ul style="list-style-type: none"> Complete a knowledge check assessment from yesterday's course work 	15 mins
	Meet & Greet: Sr. Operations Manager Meet & Greet	<ul style="list-style-type: none"> Basic introduction (including name, title, description of duties) Explain how Sr. Operations Manager interacts with Customer Care Specialists Q & A session Brad Kerley (bkerley@statesidebpo.com) 	15 mins
	Vivint Values Activity	<ul style="list-style-type: none"> Identify the value that Vivint brings to their customers. 	30 mins
	Break		15 mins
	Vivint Business Process	<ul style="list-style-type: none"> Discuss the process of obtaining new customers State the difference between Sales Rep, Slams and National Inside Sales (NIS) Outline the procedure for when the Sales Rep gets the customer to agree to the service Discuss services Vivint offers (i.e. Security, Automation, Cloud Storage, Wireless Internet, VOIP, Solar, etc.) The Vivint Package Price List Provide basic Vivint equipment information Explain the difference between Pre-Install Survey and Post-Install Survey Technician installing the equipment in the home Customer with additional questions contacts Customer Care after installation 	15 mins
	Customer Care Discussion	<ul style="list-style-type: none"> Provide Customer Care Specialist performance metrics Outline Vivint tools Discuss Customer Care Tiers 1-4 and QRF State the three P's (People, Products & Pricing) 	15 mins
	Call Structure: Greeting, Acknowledge, and Engage, Discovery, Answer, and Closing	<ul style="list-style-type: none"> Explain the structure of a Vivint call includes five parts. Create a customized greeting Outline the best part in the call to launch Merlin 	100 mins
	Lunch		60 mins

20 questions	<ul style="list-style-type: none"> Assess the caller's need by asking discovery questions Importance of probing effectively to quickly identify the customer's issue. 	10 mins
Team Pictionary	<ul style="list-style-type: none"> Supply ways to prevent a customer from calling back about the same issue, customer frustration, escalations and bad image for Vivint. 	10 mins
Team Jargon	<ul style="list-style-type: none"> Importance of keeping language simple Reasons to avoid using jargon with callers 	10 mins
H.O.M.E. (Honesty, Outstanding, Measured, Engagement)	<ul style="list-style-type: none"> Define the acronym H.O.M.E. Discuss ways that trainees can go above and beyond caller's expectations 	10 mins
L.O.V.E. (Logical, Order, Visual, Emotional)	<ul style="list-style-type: none"> Define the acronym L.O.V.E. Discuss the reason it is important to incorporate this while speaking with customers. 	10 mins
Activity	<ul style="list-style-type: none"> Assess the trainee's telephone voice, pace and ability to relay the correct greeting. 	20 mins
Break		15 mins
Meet & Greet: VP of Client Relations, Training	<ul style="list-style-type: none"> Basic introduction (including name, title, description of duties) Explain how VP interacts with Customer Care Specialists Q & A session Marie Cucchiaro, VP of Client Relations, Training & Development (mcucchiaro@statesidebpo.com) 	15 mins
Self-Reflection Activity	<ul style="list-style-type: none"> Independently work to find information that reinforces the key components discussed in today's session 	90 mins
Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
Total		510 mins

Day	Topic	Learning Objectives	Duration
3	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal and Rackspace. 	10 mins
	Knowledge Check Day 3	<ul style="list-style-type: none"> Complete a knowledge check assessment from yesterday's course work 	20 mins
	Meet & Greet: SVP of Operations	<ul style="list-style-type: none"> Basic introduction (including name, title, description of duties) Explain how SVP interacts with Customer Care Specialists Q & A session Sonjia Kurzepa, Senior Vice President 	15 mins
	Log into VMware Horizon Client	<ul style="list-style-type: none"> Install VMware on the computer Add the Server name Select the proper desktop from the options available 	15 mins
	Test VMware Horizon Client Access	<ul style="list-style-type: none"> Log into VMware Ensure credentials are functional Practice logging in and out of the VMware desktop Navigate between the personal and VMware desktop Proper log out procedures 	20 mins
	Spark	<ul style="list-style-type: none"> Log into Spark Send a message Alert someone to read the message quickly Update profile information View the conversation history Locate group chat room 	30 mins
	Practice	<ul style="list-style-type: none"> 	15 mins
	Salesforce Introduction	<ul style="list-style-type: none"> Define and log into Salesforce Identify the correct browser to use to open Salesforce Utilize best search technique to locate the customer's account 	20 mins
	Break		15 mins
	Practice	<ul style="list-style-type: none"> Log into Salesforce individually 	20 mins
	Salesforce	<ul style="list-style-type: none"> Use difference ways to navigate in Salesforce to locate specific information Explanation of the toolbar at the top of Salesforce Difference of selecting the Account Number instead of Service number Distinguish the difference between Primary and Secondary tabs Use hyperlinks to locate key account information 	30 mins

Search & Locate Activity	<ul style="list-style-type: none"> Complete a Search and Locate skill development exercise Trainees are provided an activity where they need to locate the correct service account by using the phone number, address, email address, etc. 	30 mins
Lunch		60 mins
Knowledge	<ul style="list-style-type: none"> Locate Knowledge in Salesforce Distinguish the difference between Knowledge and Merlin Use key words to locate the correct article Refine results by using the filters 	10 mins
Knowledge Learning Activity	<ul style="list-style-type: none"> Choose the best word or phrase to locate the correct knowledge article Use the filters to limit search results 	15 mins
Merlin	<ul style="list-style-type: none"> Define and locate Merlin Explain the difference between Merlin and Knowledge Use Merlin to create cases Outline the case comment template 	30 mins
Case Creation Practice	<ul style="list-style-type: none"> Present a basic scenario such as updating a phone number. Importance of correct, concise, and complete case comments. Access Merlin and create a case Choose the correct Merlin category Close the case 	30 mins
Break		15 mins
Role-play	<ul style="list-style-type: none"> Using the call structure role-play with another associate (Salesforce & Merlin) 	30 mins
Case Comments Guidelines	<ul style="list-style-type: none"> Review Merlin case comment template Identify the difference between comments that lack sufficient information. Identify comments that are too-wordy and choose words that could be eliminated. Recognize comments that contain accurate information. 	25 mins
Self-Reflection	<ul style="list-style-type: none"> Independently work to find information that reinforces the key components discussed in today's session 	60 mins
Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
Total		510 mins

Day	Topic	Learning Objectives	Duration
4	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce 	20 mins
	Knowledge Check Day 4	<ul style="list-style-type: none"> Complete a knowledge check assessment from yesterday's course work 	20 mins
	Call Listening	<ul style="list-style-type: none"> Play three calls Create case comments based on phone calls 	30 mins
	Break		15 mins
	SES (Schedule of Equipment and Services)	<ul style="list-style-type: none"> Explain the Schedule of Equipment and Services View an example Find the equipment installed in the home Locate the space where the contract signer writes their passcode Recognize the policy for cancellation 	15 mins
	PSA (Purchase and Services Agreement)	<ul style="list-style-type: none"> Explain the Purchase and Services Agreement 	45 mins
	Vivint Academy	<ul style="list-style-type: none"> Access Vivint's Learning Management System Locate a specific eLearning lesson 	45 mins
	Lunch		60 mins
	Salesforce Account Maintenance		15 mins
	Adding a Permit	<ul style="list-style-type: none"> Define when the contract signer needs a permit Locate the permit section in salesforce Add or edit a permit to the customer's account Recognize the required fields to complete Locate the central station button 	30 mins
	Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the demonstration. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	30 mins
	Changing Contract Signer	<ul style="list-style-type: none"> Handle requests to change the contract signer or modify the name 	10 mins

Modifying/Adding Email	<ul style="list-style-type: none"> ▪ Use the contact card to locate the email address ▪ Add or modify an existing email address ▪ Importance of repeating the email address back to the caller for accuracy ▪ Identify the button to select after adding or modifying the permit information ▪ Recognize the sections in the permit section to leave blank 	15 mins
Practice	<ul style="list-style-type: none"> ▪ Explore Salesforce and apply the steps learned from the demonstration. ▪ Use Merlin to locate the answers. ▪ Utilize Knowledge to find the step-by-step article. 	30 mins
Break		15 mins
Passcode	<ul style="list-style-type: none"> ▪ Identify the difference between the primary and secondary passcode. ▪ Define partial passcode verification ▪ Handle situations when a caller cannot provide the primary passcode. 	15 mins
Role-play	<ul style="list-style-type: none"> ▪ Explore Salesforce and apply the steps learned from the demonstration. ▪ Use Merlin to locate the answers. ▪ Utilize Knowledge to find the step-by-step article. 	30 mins
Live Calls	<ul style="list-style-type: none"> ▪ View a real customer interaction. ▪ See the screen navigation progression while listening to the customer and Customer Care Specialist. 	60 mins
Role-play	<ul style="list-style-type: none"> ▪ Explore Salesforce and apply the steps learned from the demonstration. ▪ Use Merlin to locate the answers. ▪ Utilize Knowledge to find the step-by-step article. 	30 mins
Self-Reflection	<ul style="list-style-type: none"> ▪ Independently work to find information that reinforces the key components discussed in today's session 	60 mins
Survey	<ul style="list-style-type: none"> ▪ Complete a survey to assess the effectiveness of the training 	10 mins
Total		510 mins

Day	Topic	Learning Objectives	Duration
5	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce 	10 mins
	Knowledge Check Day 5	<ul style="list-style-type: none"> Complete a knowledge check from yesterday's course work 	20 mins
	Meet & Greet: Manager & Supervisors	<ul style="list-style-type: none"> Basic introduction (including name, title, description of duties) Explain how interacts with Customer Care Specialists QRF, Escalation, Performance Metrics, downtime form, downtime process and helpdesk. Tina Keeney and Carlos Ortiz (tkeeney@statesidebpo.com and cortiz@statesidebpo.com) 	30 mins
	Break		15 mins
	Softphone	<ul style="list-style-type: none"> Demonstrate log in and out procedures Testing equipment to ensure that everything is working Explaining the difference between Softphone and inContact Emphasis the importance of not using the keypad or touching any buttons after logging into Softphone 	15 mins
	Test Softphone Access	<ul style="list-style-type: none"> Log into Softphone Test sound and microphone Log out of Softphone 	15 mins
	inContact	<ul style="list-style-type: none"> Logging into inContact Launching the Agent Console Change statuses Conferencing parties together Transfer the caller to a different department Toggling between lines Place the caller on hold and take them off hold Selecting the correct disposition Proper Log out procedures Explain the difference between blind/warm transfer Use proper word choice when transferring the call 	30 mins
	Practice	<ul style="list-style-type: none"> Test login access Apply demonstration practices to get familiar with the phone system Discuss the inContact Auditing process that begins on Day 7 	60 mins
	Lunch		60 mins

De-escalations & QRF (Quick Response Force)	<ul style="list-style-type: none"> ▪ Recognizing an escalated situation ▪ Explain the Quick Response Force ▪ Asking questions before contacting QRF ▪ When it is appropriate to connect the caller with a Supervisor/QRF ▪ Ways to de-escalation a situation 	30 mins
Transfers	<ul style="list-style-type: none"> ▪ Review the contact list ▪ Define each department ▪ Provide the hold time guideline ▪ Proper hold technicians ▪ Preventing multiple transfers ▪ Review inContact Transfer procedures 	20 mins
Transfer Activity	<ul style="list-style-type: none"> ▪ Complete a learning worksheet where various scenarios are presented. ▪ Choose the correct department based on the scenario. 	45 mins
Role-play	<ul style="list-style-type: none"> ▪ Use inContact to role-play with call structure 	35 mins
Break		15 mins
Self-Reflection Study	<ul style="list-style-type: none"> ▪ Independently work to find information that reinforces the key components discussed in today's session 	75 mins
Survey	<ul style="list-style-type: none"> ▪ Complete a survey to assess the effectiveness of the training 	10 mins
Total		515 mins

Day	Topic	Learning Objectives	Duration
6	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce and make a test call using inContact 	10 mins
	Knowledge Check Day 6		20 mins
	Meet & Greet: WorkForce Supervisor	<ul style="list-style-type: none"> Basic introduction (including name, title, description of duties) Discuss Attendance, Break and Lunch policy Call out number after training Policy for Time off requests Q & A session Richard Schwalbe (rschwalbe@statesidebpo.com) 	15 mins
	Document: Certification of Installation	<ul style="list-style-type: none"> Explain certification of installation Proper word choice to ask the customer for their method in delivering this document Explain the Salesforce steps between emailing, fax mailing the document The time frame to mail a document Outline the department that physically mails the document to the customer 	30 mins
	Break		15 mins
	Sending an Addendum	<ul style="list-style-type: none"> Define the Addendum Proper word choice to ask the customer for their method in delivering this document Explain the Salesforce steps between emailing and mailing the document The time frame to mail a document Outline the department that physically mails the document to the customer 	30 mins
	Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Addendum demonstration. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	30 mins
	Emergency Contact	<ul style="list-style-type: none"> Locate the section to add an emergency contact Search for an existing contact Recognize key information that allows editing after adding a contact Submit changes to Central Station 	15 mins

Practice	<ul style="list-style-type: none"> ▪ Explore Salesforce and apply the steps learned from the Emergency Contact demonstration. ▪ Use Merlin to locate the answers. ▪ Utilize Knowledge to find the step-by-step article. 	30 mins
Lunch		60 mins
Live Calls	<ul style="list-style-type: none"> ▪ View a real customer interaction. ▪ See the screen navigation progression while listening to the customer and Customer Care Specialist 	75 mins
Role-play	<ul style="list-style-type: none"> ▪ Practice scenarios using call structure: ▪ Customer would like a faxed copy of their Certification of Installation ▪ Adding an Emergency Contact ▪ Changing a phone number for an emergency contact ▪ Connecting an escalated caller to a Supervisor ▪ Updating an email address ▪ Transferring calls to Tier 2-4 or Customer Loyalty 	45 mins
Break		15 mins
Self-Reflection Study	<ul style="list-style-type: none"> ▪ Independently work to find information that reinforces the key components discussed in today's session 	75 mins
Survey	<ul style="list-style-type: none"> ▪ Complete a survey to assess the effectiveness of the training 	10 mins
Total		510 mins

Day	Topic	Learning Objectives	Duration
7	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce and make a test call using inContact 	10 mins
	Knowledge Check Quiz Day 7	<ul style="list-style-type: none"> Complete a knowledge check assessment from yesterday's course work 	20 mins
	inContact Audit	<ul style="list-style-type: none"> Evaluate the effectiveness of inContact training. Use inContact correctly to receive and handle calls. 	120 mins
	Break		15 mins
	Billing: Introduction	<ul style="list-style-type: none"> Explain the difference between calls handled by Customer Care and the Billing/Collections department Recognize an account 90 days past due Identify a cancelled account or approved post-poned payments 	15 mins
	Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Billing Account demonstration. Situations that require a transfer to the Billing Department. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	30 mins
	Billing: Ledger	<ul style="list-style-type: none"> Locating the Ledger Reading the Ledger to answer customer questions Locating the customer's invoice Identify service charges Recognize when the customer has made a payment Difference between a past due invoice versus the account being past due 	30 mins
	Lunch		60 mins
	Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Billing Account demonstration. Use Merlin to locate the answers. Utilize Knowledge to find the step by step article. 	30 mins
	Role-Play	<ul style="list-style-type: none"> Practice using inContact and the call structure 	30 mins

Billing: Accepting Payment	<ul style="list-style-type: none"> ▪ Recognizes payments that Customer Care Specialists may handle ▪ Modifying/Adding a bank account ▪ Accepting payments for a credit cards that are on file ▪ When to connect the customer with the Credit Card Line ▪ Providing the customer with their payment confirmation number ▪ Discuss compliance scripting 	30 mins
Practice	<ul style="list-style-type: none"> ▪ Explore Salesforce and apply the steps learned from the Billing Account demonstration. ▪ Use Merlin to locate the answers. ▪ Utilize Knowledge to find the step-by-step article. 	20 mins
Break	<ul style="list-style-type: none"> ▪ 	15 mins
Survey	<ul style="list-style-type: none"> ▪ Complete a survey to assess the effectiveness of the training 	10 mins
Self-Reflection Study	<ul style="list-style-type: none"> ▪ Independently work to find information that reinforces the key components discussed in today's session 	75 mins
Total		510 mins

Day	Topic	Learning Objectives	Duration
8	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce and make a test call using inContact 	10 mins
	Knowledge Check Quiz 8	<ul style="list-style-type: none"> Complete a knowledge check assessment from yesterday's course work 	20 mins
	Meet & Greet: J. Lodge Manager	<ul style="list-style-type: none"> Basic introduction (including name, title, description of duties) Explain how J. Lodge Manager interacts with Customer Care Specialists Explain the auditing process Discuss ways to be in compliance Examples of being out of compliance Q & A session 	45 mins
	Vivint Compliance Quiz	<ul style="list-style-type: none"> Complete a knowledge check assessment from the compliance content 	
	Break		15 mins
	Vivint Compliance Video	<ul style="list-style-type: none"> Explains ways to remain in compliance with the law 	9 mins
	Billing: Credit & Refund Request	<ul style="list-style-type: none"> Difference between Credit and Refund Locating existing credits/refunds on the customer's account Creating a credit/refunds Discuss approval stages Importance of selecting the submit for approval button Credit Admins Reasons why Credits/Refunds are rejected 	45 mins
	Lunch		60 mins
	Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Credit & Refund demonstration. Situations that require a transfer to the Billing Department. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	45 mins
	Billing Cycles	<ul style="list-style-type: none"> Locate the customer's Billing Cycle Create a manual case to change the Billing Cycle Discuss compliance scripting 	30 mins

Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Billing Cycle demonstration. Situations that require a transfer to the Billing Department. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	30 mins
Proration	<ul style="list-style-type: none"> Define the term Proration Demonstrate the Proration calculator in Merlin Provide examples of giving the customer billing changes on their next bill 	30 mins
Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Proration demonstration. Situations that require a transfer to the Billing Department. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	30 mins
Live Call Demonstration	<ul style="list-style-type: none"> View a real customer interaction. See the navigation while listening to the customer and Customer Care Specialist 	30 mins
Break		15 mins
Self-Reflection	<ul style="list-style-type: none"> Independently work to find information that reinforces the key components discussed in today's session 	60 mins
Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
Total		510 mins

Day	Topic	Learning Objectives	Duration
9	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce 	5 mins
	Knowledge Check Quiz 9		
	Billing Address Update	<ul style="list-style-type: none"> Locate the Billing Address in Salesforce Explain the difference between the Service Address and Billing Address Changes to the Service Address are handled by Moves & Takeovers Make change to the billing address Explain the steps to validate the new address in Salesforce 	30 mins
	Practice	<ul style="list-style-type: none"> Explore Salesforce and apply the steps learned from the Billing Address demonstration. Situations that require a transfer to the Billing Department. Use Merlin to locate the answers. Utilize Knowledge to find the step-by-step article. 	30 mins
	Online Account Center	<ul style="list-style-type: none"> Log into the Online Account Center Locate the invoice and payment screen Modify basic customer profile information Make a payment 	15 mins
	Practice		15 mins
	Change Auto-Pay to Direct Invoice	<ul style="list-style-type: none"> Changing the customer's method of payment 	15 mins
	Customer Care Location	<ul style="list-style-type: none"> Responding professionally to personal questions Differences of handling a Canadian account 	15 mins
	Break		15 mins
	Transition to Operations	<ul style="list-style-type: none"> Explain the phrases to transition into production Discuss certification, nesting and production schedule Provide production date 	30 mins
	Certification Schedule	<ul style="list-style-type: none"> Discuss certification schedule 	10 mins
	Lunch		60 mins
	Role-play	<ul style="list-style-type: none"> Role-play with various scenarios ranging from basic to complex using call structure & inContact 	60 mins

	Live Call Demonstration	<ul style="list-style-type: none"> ▪ View a real customer interaction. ▪ See the screen flow while listening to the customer and Customer Care Specialist 	45 mins
	Self-Reflection	<ul style="list-style-type: none"> ▪ Independently work to find information that reinforces the key components discussed in today's session 	60 mins
	Survey	<ul style="list-style-type: none"> ▪ Complete a survey to assess the effectiveness of the training 	10 mins
	Total		510 mins

Day	Topic	Learning Objectives	Duration
10	Review		30 mins
	Log into Tools	<ul style="list-style-type: none"> Log into Spark, Stateside Portal, Rackspace, VMWare, Salesforce 	10 mins
	Smart Pay Final Exam	<ul style="list-style-type: none"> Complete a final exam from Days 2-9 	60 mins
	Mock Call Certification	<ul style="list-style-type: none"> Mock call certifications based on course material learned during training 	390 mins
	Live Calls		Varies
	Break		15 mins
	Role-play	<ul style="list-style-type: none"> Role-play with various scenarios ranging from basic to complex using call structure & inContact 	N/A
	Lunch		15 mins
	Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
	Break		10 mins
	Self-Reflection Study	<ul style="list-style-type: none"> Independently work to find information that reinforces the key components discussed in today's session 	30 mins
	Total		510 mins

Day	Topic	Learning Objectives	Duration
11	Debrief	<ul style="list-style-type: none"> Review and ensure everyone is prepared Best practices for conversation and using resources 	1 hr
	Nesting	<ul style="list-style-type: none"> Handle inbound calls 	440 mins
	Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
	Exam Retakes	<ul style="list-style-type: none"> Complete a final exam from Days 2-8 	N/A
	Total		510 mins

Day	Topic	Learning Objectives	Duration
12	Debrief	<ul style="list-style-type: none"> Review and ensure everyone is prepared Best practices for conversation and using resources 	1 hr
	Nesting	<ul style="list-style-type: none"> Handle inbound calls 	440 mins
	Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
	Total		510 mins

Day	Topic	Learning Objectives	Duration
13	Debrief	<ul style="list-style-type: none"> Review and ensure everyone is prepared Best practices for conversation and using resources 	1 hr
	Nesting	<ul style="list-style-type: none"> Handle inbound calls 	340 mins
	Soft Skills Training	<ul style="list-style-type: none"> Proper techniques to de-escalate a situation. Ingredients for an excellent telephone voice The difference between empathy and sympathy The importance of expressing empathy with a customer Ways to use active listening skills 	1 hr
	Survey	<ul style="list-style-type: none"> Complete a survey to assess the effectiveness of the training 	10 mins
	Total		510 mins

Training Scorecard

Many individuals that arrive at StatesideBPO have their own motivation, whether that's a career, advancement, income or just having something that gives them purpose. The Training & Development team understands that providing a solid training program is essential for the learning process to meet the needs of each learner. Trainers at StatesideBPO work hard to:

- Inspire learners to be the best in the business.
- Tailor guidance necessary for each learner.
- Build trust among all learners in the class.
- Give learners the opportunity to experiment, contribute and excel

StatesideBPO strives to provide realistic training that prepares the learner for handling live calls. In order for a learner to reach their highest potential (instead of just going through the motions), the following categories are evaluated based on the learner's progress:

Legend:

- 1 = Attendance 2= Engagement 3=Final Exam 4=Polls 5=Self-Reflection 6=Quizzes
7= Certification

Explanation of Categories

Category	Metric	Point Value	Maximum
1	<p>Attendance defined as:</p> <ul style="list-style-type: none"> • Arriving to work on time • Returning from lunch and breaks on time • Completes the entire day of training • Earn 1 point per day when the criteria above is met 	1	10
2	<p>Engagement defined as:</p> <ul style="list-style-type: none"> • Receiving perfect attendance for the day, submitting the self-reflection assignments, answering poll questions and responding when called upon in class. • Being responsiveness when called upon in class • Earn 1 automatic point per day. 	Varies	Varies

3	Final Exam defined as: <ul style="list-style-type: none"> • Completing a cumulative assessment. • The percentage earned on the first attempt are applied toward the score card. • Example – Learner receives a 70% on the first attempt but a 90% on the second attempt. The learner receives 70 points. • Earn 0 – 100 points 	Varies	100
4	Polls defined as: <ul style="list-style-type: none"> • Answering poll questions presented in the Virtual Training room. • The Trainer uses a variety of different questions. Some days could be less than others. • Earn 1 point per each correctly answered question 	Varies	Varies
5	Self-Reflection defined as: <ul style="list-style-type: none"> • Each time the learner submit their self-reflection it is applied to the scorecard. • Example – Learners submits their self-reflection on Days 3-10 but doesn't submit on day 2. The learner earns 8 points. • Earn 1 point per submitted self-reflection assignment. 	1	9
6	Quizzes defined as: <ul style="list-style-type: none"> • The percentage earned from the quiz is applied to the scorecard. • Example – Learner earns 70% on the quiz. This means that 70 points are added to the scorecard. • Earn 0 – 1,000 points. 	100	1,000
7	Certification defined as: <ul style="list-style-type: none"> • Points earned per mock call certification are applied to the scorecard • Earn 0 – 200 points. 	100	200

WIIFE (What's In It For Me?)

Each day in training is an opportunity to learn and grow! The training scorecard is a reward for learners that demonstrate top performance. After completion of this 10-day Training course, the top performer(s) receives their first choice in schedule preference. Additionally, the effort and hard work that a learner places each day during training will result in a resourceful, knowledgeable Customer Care Specialist graduating from our program. Learners will feel confident and instant gratification knowing that they are giving their customers the best service over the leading competitors.

What does a typical scorecard look like?

Learner 1 receives their first schedule choice.

Name	Attendance	Engagement	Final Exam	Polls	Self-Reflection	Quizzes	Certification	Total
Learner 1	5	90	100	90	10	900	200	1395
Learner 2	10	30	60	40	5	600	150	895
Learner 3	10	10	100	80	10	800	180	1190
Learner 4	10	10	90	70	10	1000	200	1390
Learner 5	4	30	50	20	5	500	100	709

Virtual Classroom

Overview

This guide is to outline Adobe Connect Virtual Classroom features, troubleshoot issues such as audio and latency.

Objectives

This module demonstrates the following features:

- Accessing the Virtual Classroom
- Ensuring audio and microphone functions are working
- Acknowledge a screen share request
- Change agent statuses
- Use the audio wizard
- Enlarge the Virtual Classroom
- Using the Audio Setup Wizard
- Troubleshooting audio, latency & frozen adobe room issues

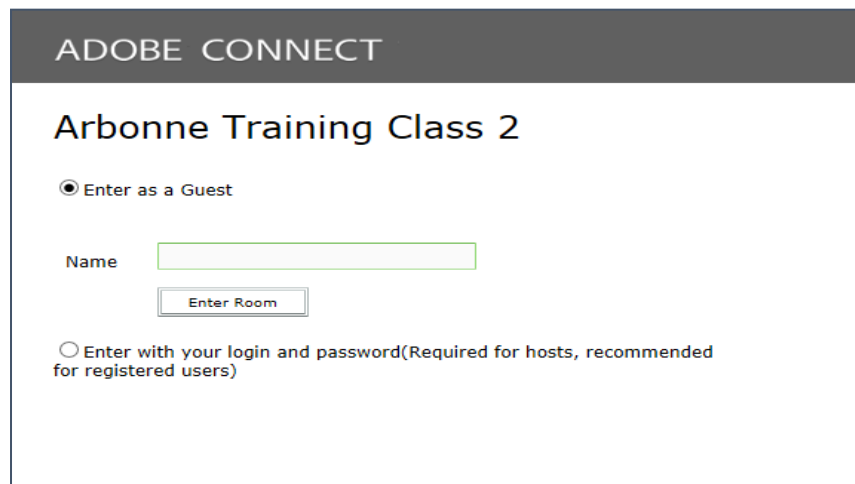
Training Length

30 mins

Adobe Connect

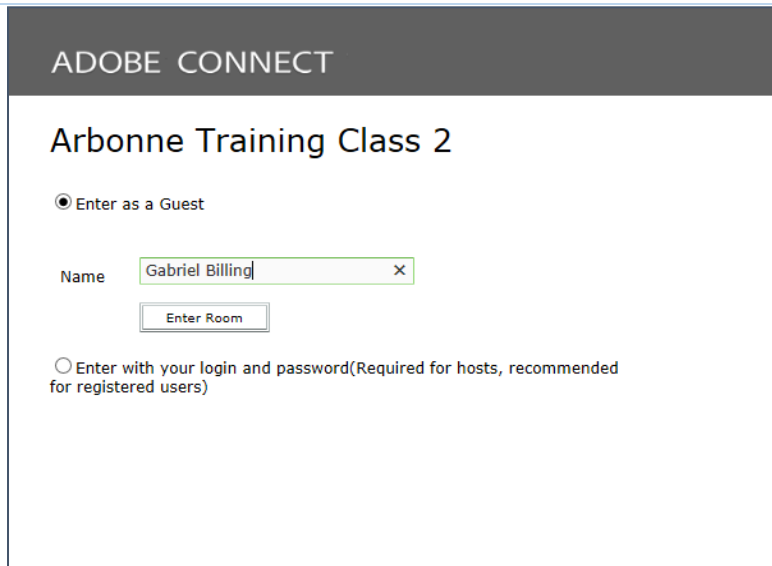
StatesideBPO uses a virtual classroom powered by Adobe connect. The Trainer sends all trainees a hyperlink to connect with co-workers using a program called **Adobe Connect**. **This link is only accessible using Internet Explorer**. Using browsers such as Google Chrome or Firefox are not compatible and you can find yourself facing numerous issues when using these browsers. This module outlines the various ways StatesideBPO uses the virtual classroom to communicate and make learning fun!

Upon clicking the hyperlink, the following screen appears:



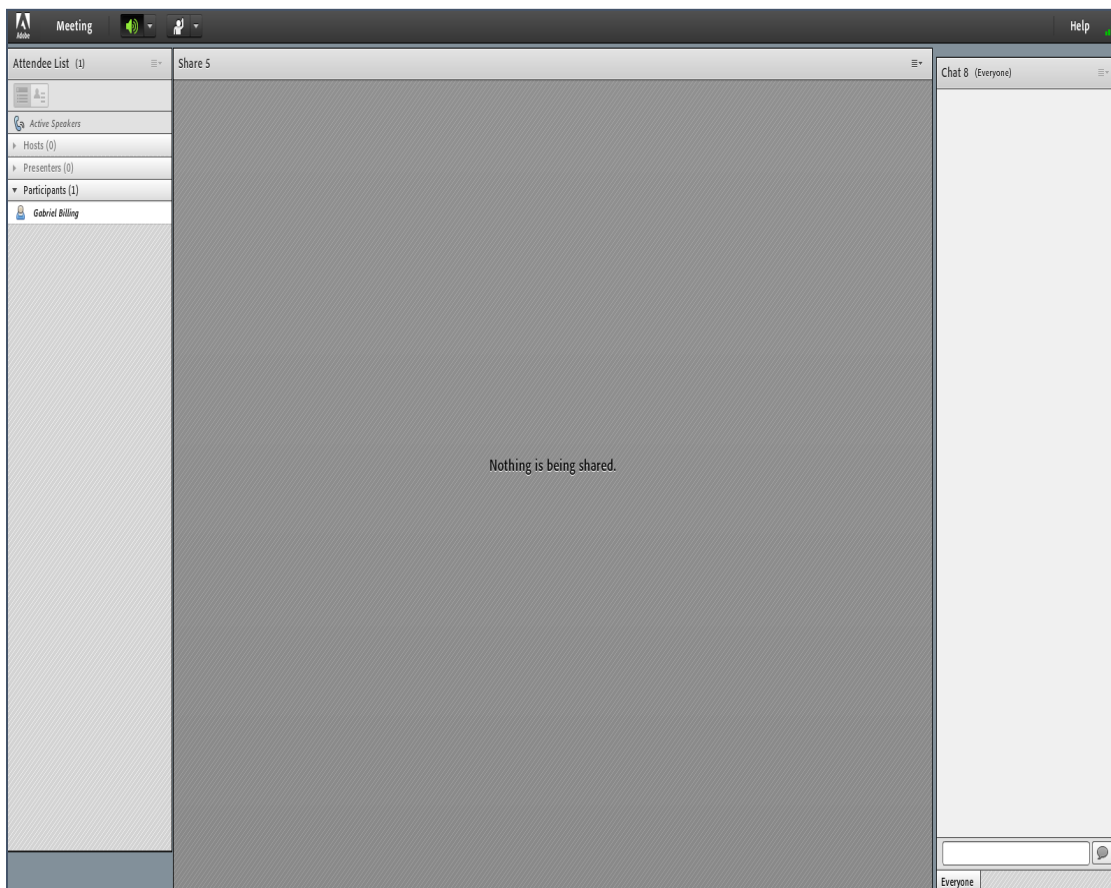
The screenshot shows the Adobe Connect interface for a room titled "Arbonne Training Class 2". At the top, there is a dark grey header with the text "ADOBE CONNECT". Below the header, the room name "Arbonne Training Class 2" is displayed. There are two radio button options for entering the room: "Enter as a Guest" (which is selected) and "Enter with your login and password (Required for hosts, recommended for registered users)". Below the "Enter as a Guest" option, there is a text input field labeled "Name" and a button labeled "Enter Room".

Input your full name. Do not include nicknames, abbreviations or only a first name. This ensures the agent receives the credit for attending.



Next, click **Enter Room**. Give the page a few minutes to load. A blue progress bar appears and the classroom displays accordingly.

Let's look at the features of the room:



Customer Care Specialist Controls

Upon entering the room, the Trainer provides control to use the microphone. The following pop-up appears:

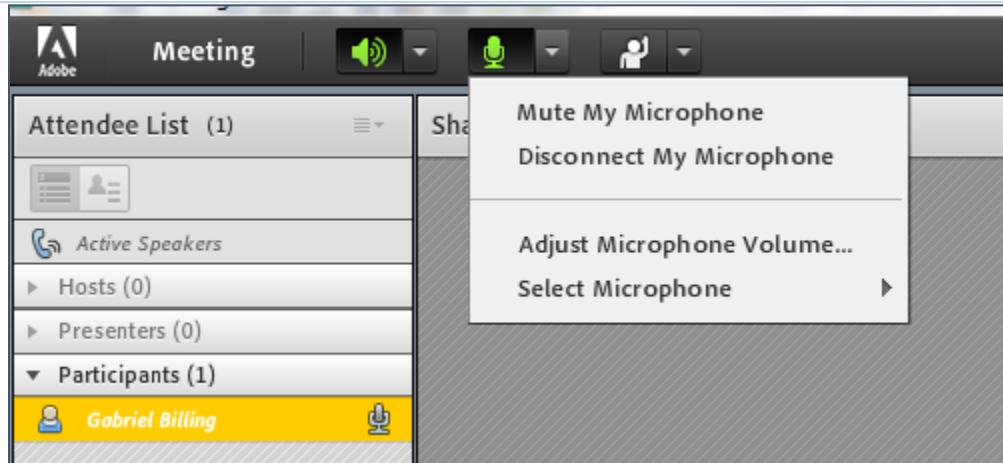


Microphone/Speaker Controls

Microphone/Speaker: A gray microphone/speaker indicates that it is not active. Click the *speaker* and *microphone* to make them active. The icons change from gray to green:



It's best to mute the microphone if not speaking to eliminate any background noise. Click the **Microphone** icon at the top of the room, the following options appear:

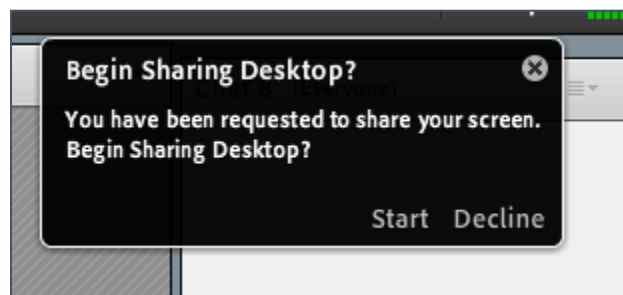


Click **Mute My Microphone** and a diagonal line displays over the microphone icon:



Share Desktop

It may be necessary to share the screen. The Trainer sends the request via the virtual classroom and the following message appears in the **upper right corner**:



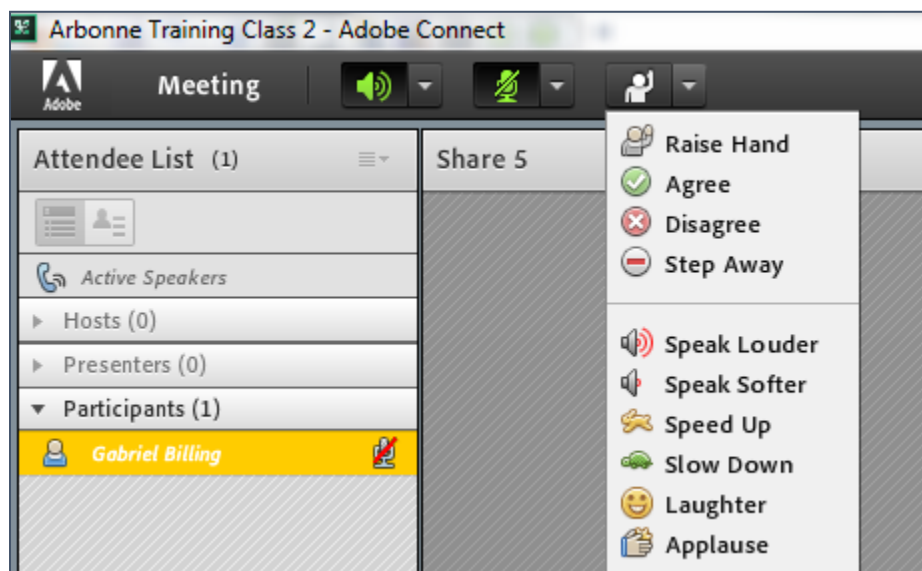
Click **Start** in the upper right corner. This enables everyone to view the agent's screen.

Status

Use the statuses for the following reasons:

- **Raise Hand** – To alert the Trainer that there is a question or concern.
- **Agree/Disagree** – Are used in the classroom to increase class participation.
- **Step Away** – To inform the Trainer that the trainee is away from their computer (i.e. trainee needs to use the restroom).

To change the status, click the down arrow next to the icon with the hand raise and the following appears:



Chat Pod

This gives the trainee the ability to write responses, ask questions, etc. It is preferred that when the trainee has a question, use raise their hand in the classroom and speak into their microphone/headset rather than type it into the chat pod.

Adobe Icon

When using multiple windows, the Adobe room maybe in a minimized mode. To return to the room, locate the following icon on the computer task bar:



Click the icon and the room appears. **Do not log back into the classroom if this icon is present in the Task Bar.** This causes the trainee to be in the room twice and creates an echoing noise.

Additional Options

- **Full Screen:** Use this feature when the Trainer demonstrates an action or task to enlarge the entire room. It makes the screen appear bigger.
- **Exit Adobe Connect:** Leave the classroom at the end of the day.

Audio Setup Wizard

The wizard provides guidance through four steps such as speakers, selecting a microphone, and optimizing the audio. If the trainee has never used Adobe Connect before, they may see a Flash Player settings box asking for permission to use their camera and mic. Selecting **Remember** skips this prompt in the future.

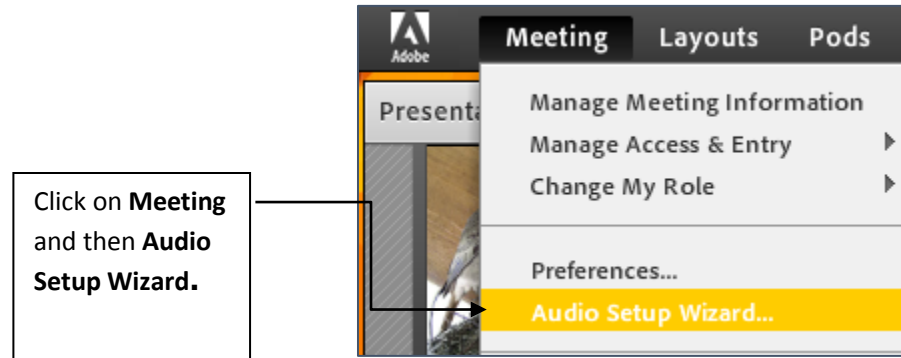
The most common issue trainees come across are Audio issues within the Adobe room. In most cases audio issues, can easily be resolved by using the Audio Setup Wizard. Here are a few examples of when you should use the Audio Wizard:

- There is no sound coming from the Adobe room.
- A USB headset was recently disconnected and plugged back into the computer.
- Defective USP port that requires to be connected to a different port on the PC or laptop.
- Plugging in a different headset.

Tip: USB ports can be found on the side of a laptop or the back of a PC. Here's what it looks like:



For the most part, anytime the trainee stops receiving sound from the classroom they'll want to first go into the Adobe Wizard Setup guide.



The following screen appears:



By clicking **Next** the Audio Wizard Setup Guide walks the trainee through all the steps they'll need to take to help them hear again! Most importantly ensure that their headset is listed in the following drop down menu:



In some cases, the trainee needs to completely exit out of the adobe room and re-enter for the changes to effect.

Note: If the headset is not listed in the drop-down menu proceed to [Troubleshooting: Audio Issues](#) in this guide.

Tip: Please make sure to thoroughly read each step and avoid skipping sections.

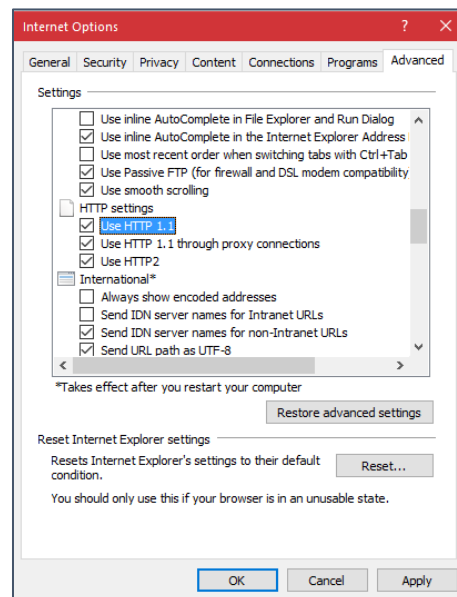
Adobe Troubleshooting

The next few sections of this guide will cover ways to troubleshoot certain Adobe issues.

“I cannot get into the meeting”

If you are having trouble joining a meeting try the following:

1. Enter the meeting as a Guest user by entering in First and Last Name in the Guest field.
2. Click the Help link on the Meeting Login page. This takes the trainee to the Test Meeting Connection page where they can verify that their computer meets all necessary requirements. If they do not pass the test they will be given instructions for what they need to do.
3. Make sure pop-up blocking software is not blocking the meeting window.
4. The computer may be using a proxy server. To resolve this in Internet Explorer, select Tools > Internet Options > Advanced tab. Then enable the setting Use HTTP 1.1 through proxy connections.

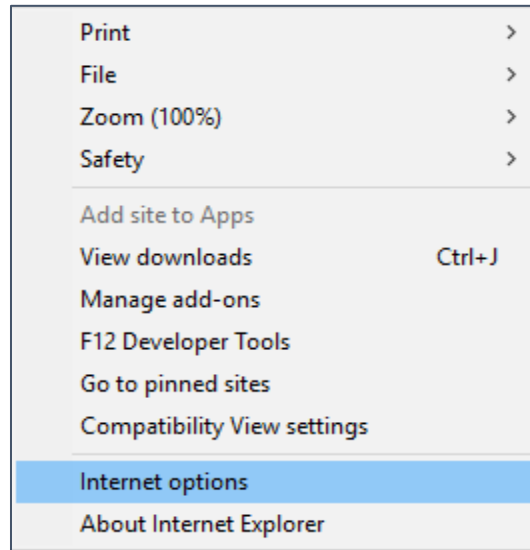


Clearing Cookies

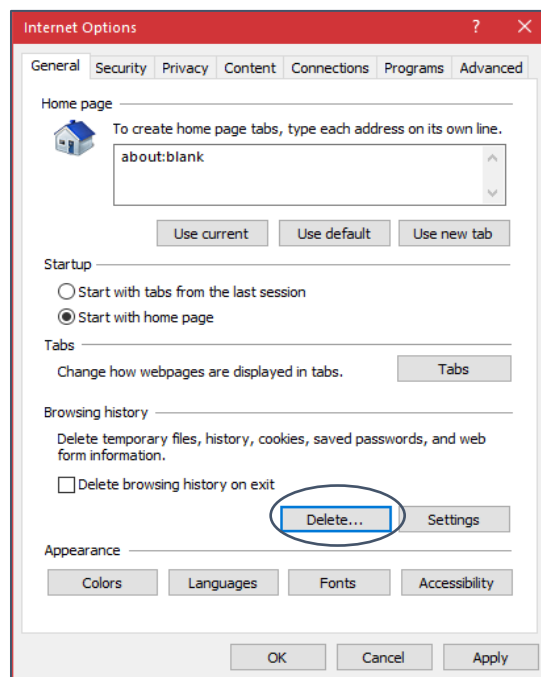
After doing this, clearing cookies, close all browser windows and attempt to re-enter the meeting. Here are the steps to clear cookies:

Step 1. Click on the tools/settings icon .

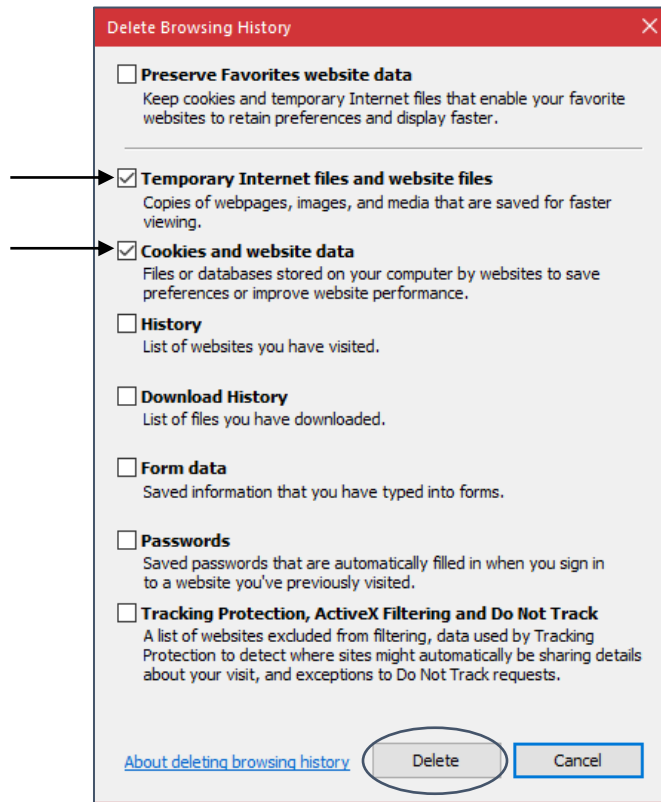
Step 2. Then select **Internet Options**:



Step 3. Under **General** and **Browsing History** select **Delete**



Step 4. Select **Temporary Internet Files and Website Files** along with **Cookies and Website Data**. Then press **Delete**.

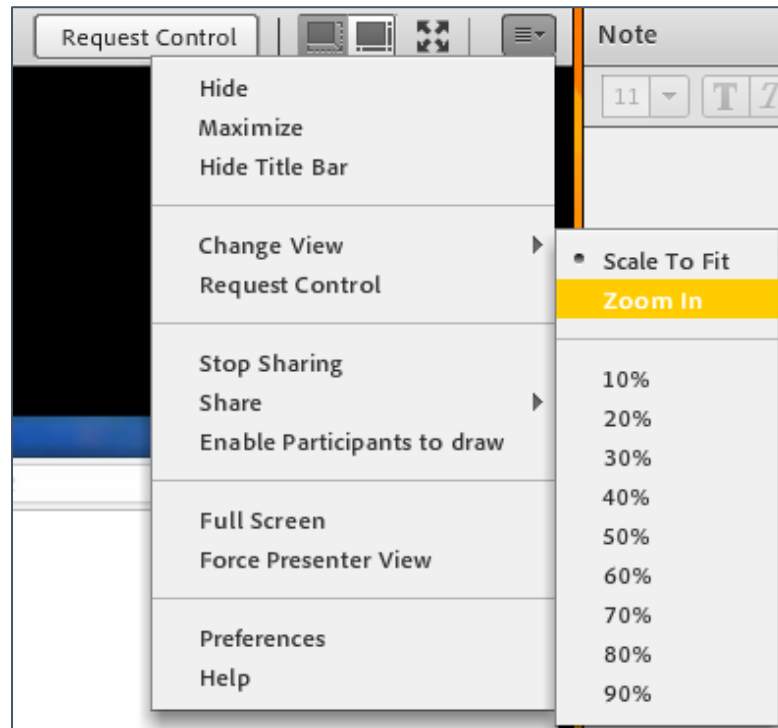


Note: This only pertains to issues connecting to the Adobe Room. In other cases, the trainer puts a lock on the room and to enter it simply requires the trainee to click “Request Entry”. By doing this it sends a notification to the Trainer, once accepted the trainee should now be in the room.

“The host is sharing their screen, but it is fuzzy”

If the trainee is having trouble seeing a host’s screen, try the following:

1. Click the Full Screen button on the top of the Share pod.
2. View the full resolution by using the pod options menu in the top right hand corner of the pod to select Change View > Zoom In:



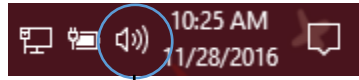
Audio Issues

Even after running the audio wizard and exiting/re-entering the Adobe Room the trainee can find themselves still facing Audio Issues. In this section we’ll guide the trainee on the steps to take in the event this occurs. Here are a few examples of when to follow these steps:

- After running the audio wizard and re-entering the training room there’s still no sound.
- The trainee doesn’t see a headset listed in the drop down menu in Step 2 of the Audio Wizard.

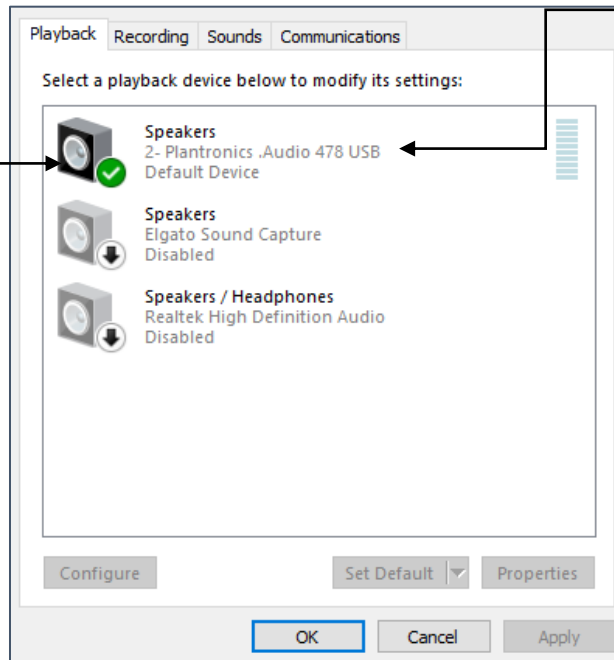
First, double check that the USB headset is fully plugged into a functioning USB port on your pc or laptop before beginning. To see what a USB port looks like click [here](#).

On the taskbar follow the steps shown below:



Right-click this icon and click on **Playback Devices**.

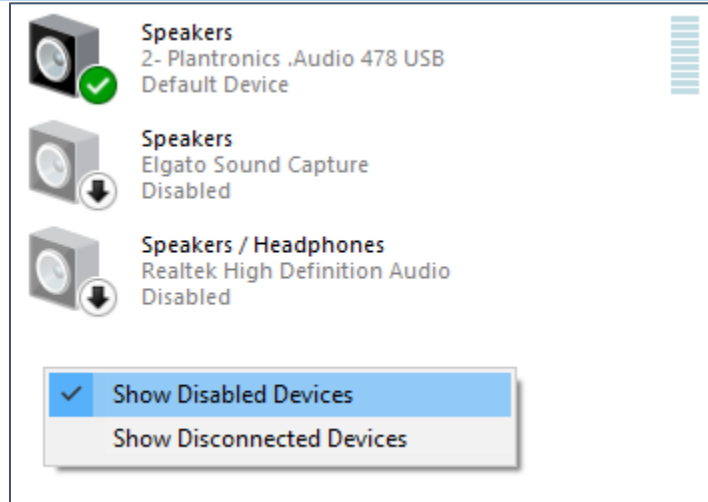
The following displays:



Step 1. Make sure the USB Headset is listed here and that it's set to the **Default Device**. To do this right-click it and select Set to Default.

Step 2. If the headset is properly working the trainee should be able to hear a sound when testing it. To test it right-click the device and select test.

If they don't see their headset listed here at all then right click the white space and make sure **Show Disabled Devices** is enabled.

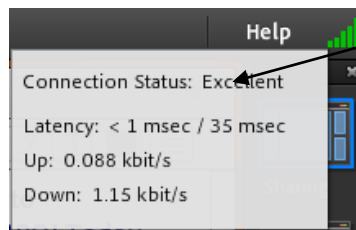


If the headset is not listed, it could be an issue with the USB port or headset. Request that the trainee use a spare headset in the meantime (if possible). Also, inform the Trainer that they've completed all of the Audio Issues with no resolution. The Trainer works on creating a ticket to have IT reach out to the trainee.

If the trainee was able to hear a sound after testing their device please run through the Audio Setup Wizard once more, the issue should now be resolved.

Latency Issues

The performance of Adobe Connect depends on a stable internet connection. It's important that we follow StatesideBPOs computer requirements in regards to the minimum speed allowed. We can avoid latency issues by using a hard-wired connection vs using a WiFi connection. **The use of WiFi is completely prohibited.** To view the connection status left-click the signal bars on the top right of the room:



To help diagnose connection issues click [here](#).

Key Learnings

StatesideBPO uses a system called Adobe Connect to offer a virtual classroom environment. This allows us to share training materials, demonstrates tasks/programs and communicate with the trainee. There are times where the trainee faces issues and needs to know how to overcome those challenges. Challenges such as audio issues, latency issues and a frozen screen.

Review

1. How can the trainee identify when their microphone is enabled?
2. How does the trainee identify when the microphone is on mute?
3. What's the preferred web browser that's compatible with Adobe Connect?
4. If the Trainer is demonstrating the steps to use a new program, how can the trainee enlarge the room?
5. In the field below, it is acceptable to use a nickname or first name only.

TRUE FALSE

6. How many steps in total are there in the Audio Wizard Setup Guide?
7. When running through the Audio Wizard Setup Guide it's not required to close and re-open the Adobe Room.

TRUE FALSE

8. Who should the trainee reach out to first if the headset does not appear in your Playback Devices?

9. Latency issues is dependent on the trainees computers performance.

TRUE FALSE

BONUS: What is StatesideBPOs minimum required upload and download speed?

Stateside Portal

Overview

The Stateside portal is the central location to share information with Stateside employees.

Objectives

This module includes the following topics:

- Logging into the Stateside Portal
- Explains the purpose of using the Stateside portal
- Modify your profile information (including uploading a profile picture)
- Outline each tab and their definition

Training Length

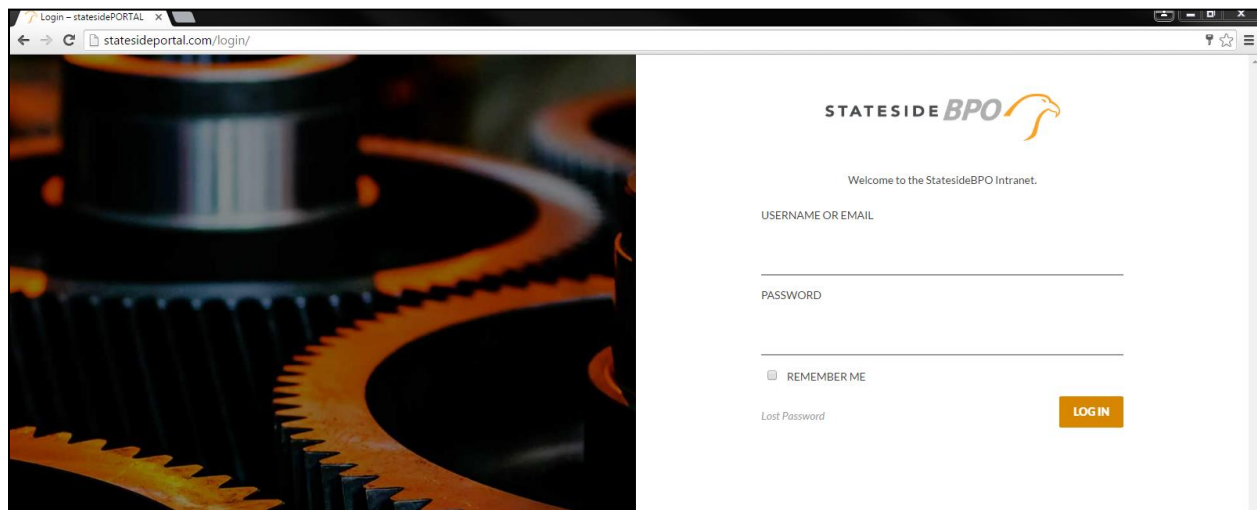
45 mins

Introduction

The Stateside portal is a web application platform used to share, organize and discover information. Empower employees to intelligently discover, share and collaborate across any platform.

Login Procedures

To access the Stateside portal, use the following web address: <http://statesideportal.com/>. The home page appears:



Input the credentials as follows:

- Username or email: stateside email address (i.e. jsmith@statesidebpo)
- Password: unique password

Login Tips

- It's best to select Remember Me. Upon accessing the site a second time, the user's email address and password populate.
- Users that cannot remember their password, can select **Lost Password** and input their email address. The Stateside portal sends notification to reset the password to the email address on file.

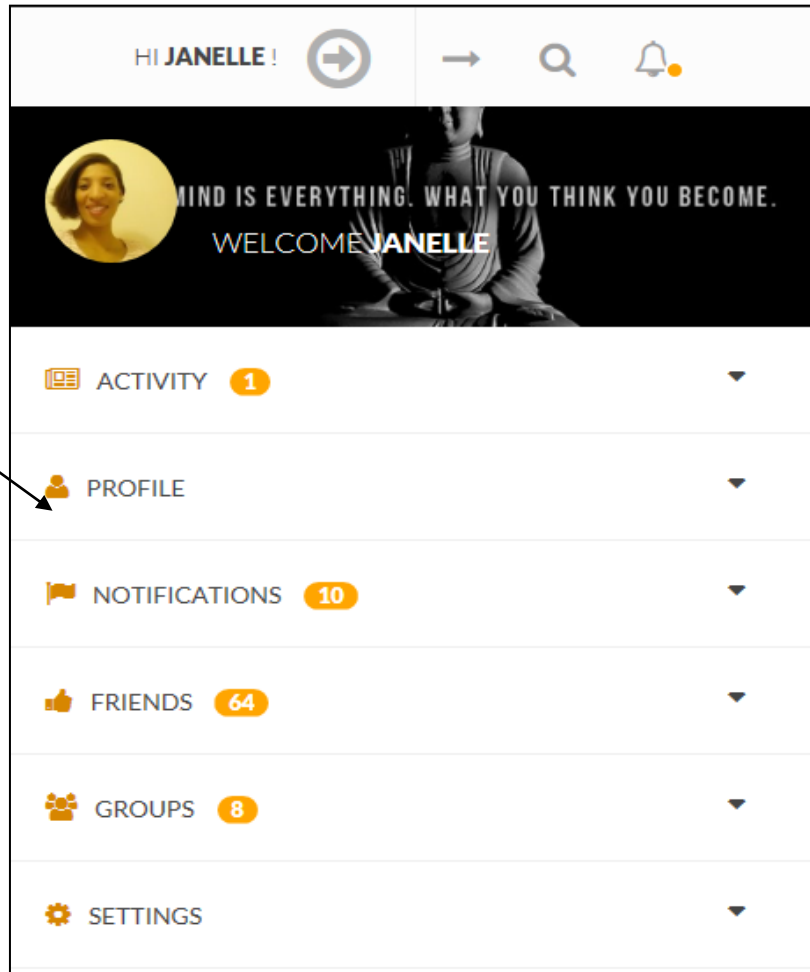
Getting Started

- Upon logging into the portal, complete the following checklist:
- Update your profile information
- Add a photo picture
- Request access to a group
- Locate Vivint Training Material

Profile Update

- Click your name in the upper right corner to display the menu options:

Select **Profile** and then choose **Edit**.



Scroll down the page until the following appears:

EDITING 'BASE' PROFILE GROUP

BASE
SOCIAL

FIRST NAME (REQUIRED)

Janelle

This field can be seen by: **Everyone**

LAST NAME (REQUIRED)

Faison

*THIS FIELD CAN BE SEEN BY: **ONLY ME** CHANGE*

Update the following fields:

- FIRST NAME
- LAST NAME
- BIRTHDAY
- HIRE DATE
- ACCOUNT
- LOCATION

To restrict certain groups from reviewing information, select **Change**. Choose the desired option.

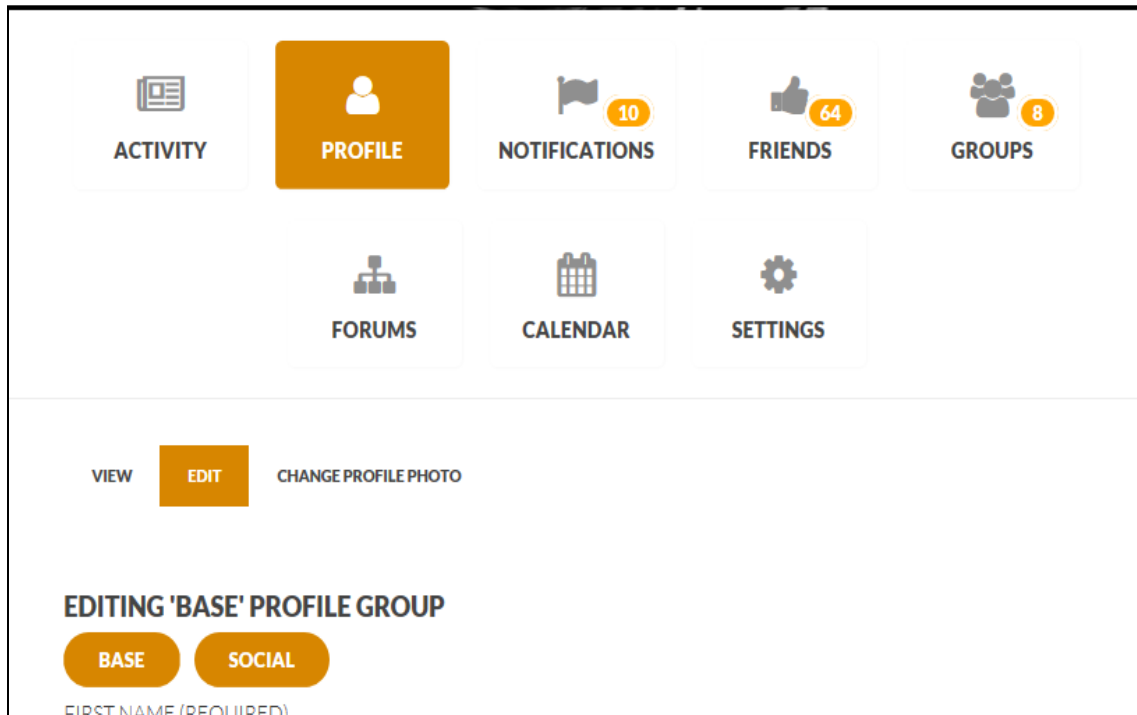
WHO CAN SEE THIS FIELD?

EVERYONE
 ONLY ME
 ALL MEMBERS
 MY FRIENDS

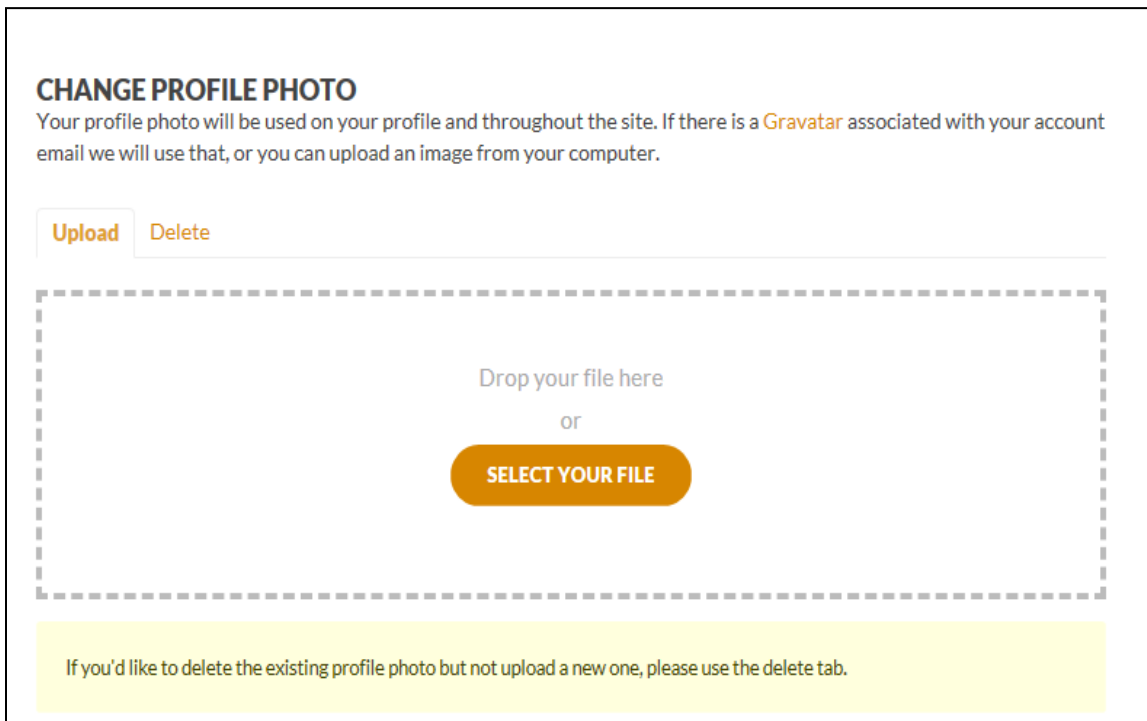
Close

Then click Close to collapse the options. Click SAVE CHANGES upon updating all the fields.

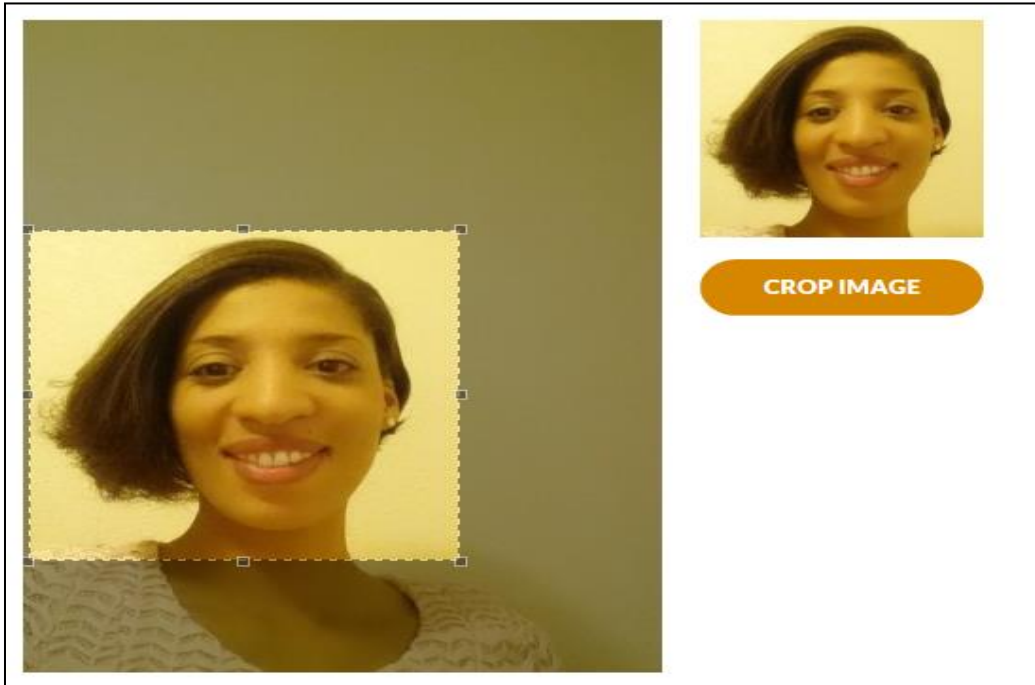
Click **CHANGE PROFILE PHOTO** from the page below:



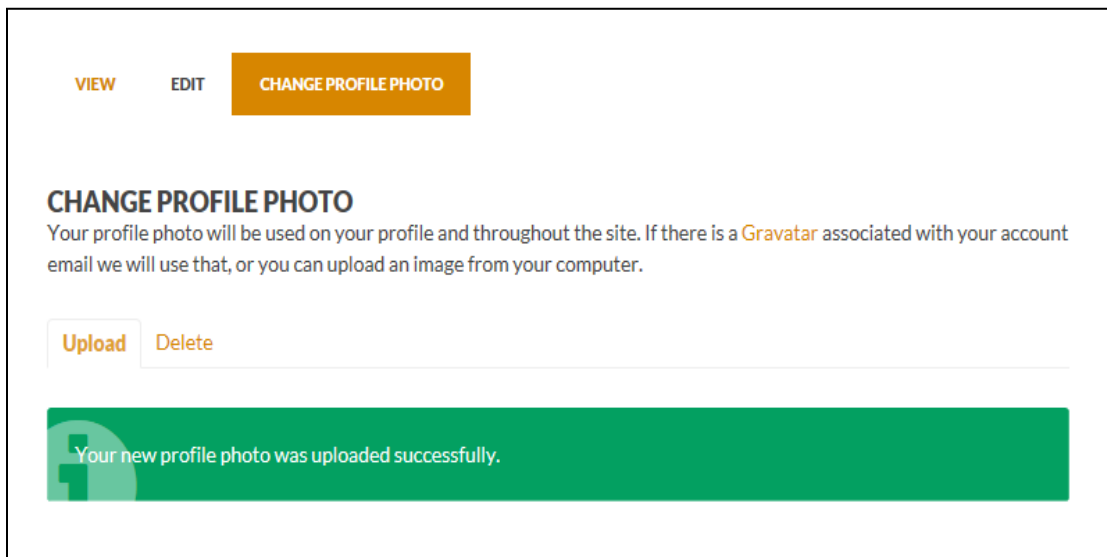
Scroll down the page to view the following:



Click **SELECT YOUR FILE** and browse your personal files to look up a profile picture.



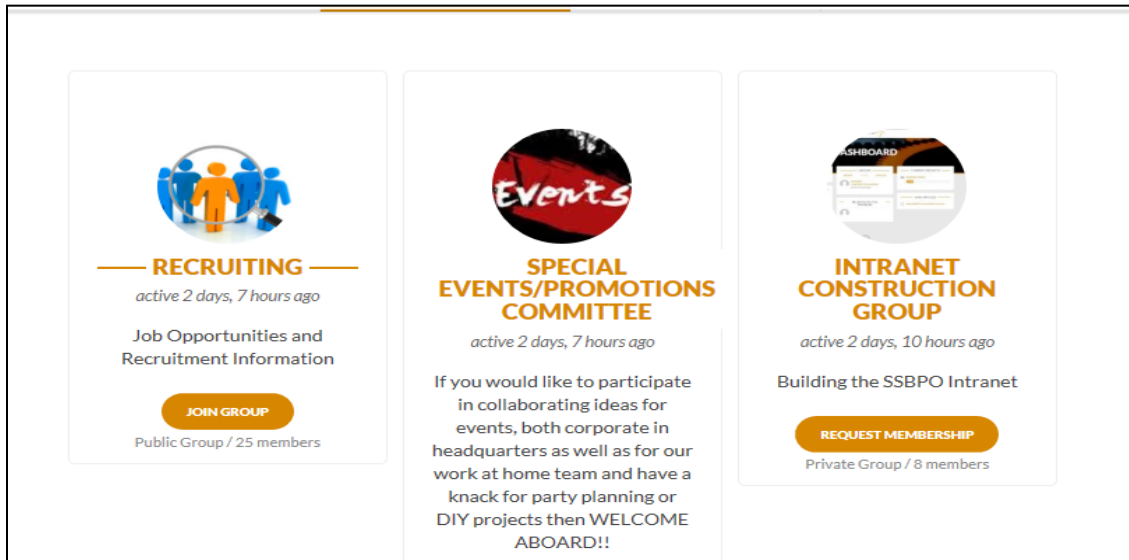
After selecting the photo, click the highlight square on the left and move it to its desired location. Review the photo to the right as you move the square around or resize the square. Click **Crop Image** and the saves are successfully saved.



This photo appears to all members of the Stateside Portal.

Request Access to A Group

A group is defined as select members have exclusive access to the contents within the group. Select **Group** from the left side to display a list below:



Locate the **Vivint** group and select **REQUEST MEMBERSHIP**. The request is sent to the admin group. Upon being accepted in the group, you have access to files and discussions that only pertain to that account.

Other Tabs

The tabs on the left side are used for the following:

Dashboard	Provides overall company information such as recent posts, upcoming birthdays, individuals that are currently logged into the portal.
Wiki	A place for internal company procedures such as general information that applies to all employees.
News	This stores internal company announcements and anytime a post is made to a general section it's contains appear in the News section.
Shining Star	A place to recognize employees for outstanding performance such as meeting performance goals, completing training, customer compliments, etc.
Discussions	These can be used for either private discussions for people working for one company or on a specific project, or public discussions about life in general.
Zenefits	A shortcut to the benefits website.
StatesideBPO	Populates the StatesideBPO company website.
Download	A shortcut for programs to install on an employee's personal computer.

Key Learnings

The Stateside portal is a web application platform used to share, organize and discover information. Empower employees to intelligently discover, share and collaborate across any platform.

Review

1. If the Customer Service Specialist cannot remember their password, what is the process?
2. What are the steps to update your profile information or password?
3. The birthday field is used to advise others via the dashboard of when someone has a birthday upcoming.

True False

4. A Customer Care Specialist can start a discussion.

True False

5. All Stateside employees have access to the Vivint group.

True False

6. Choose where the Customer Care Specialist can locate the Vivint Training Material.
 - a) Dashboard
 - b) Wiki
 - c) Groups
 - d) Discussions

Training Expectations

Overview

This module provides expectations and policies during training.

Objectives

This module contains the following topics:

- Defines ROPES (expectations).
- Describes the structure for training class.
- Explains the training policies regarding attendance, tardiness and disciplinary action.

Training Length

45 mins

Virtual Learning Environment

StatesideBPO uses a system for delivering learning via the web. This includes sharing files, chatting, completing quizzes/progress checks, tracking student attendance and participation. The virtual environment makes a unique experience for the trainee because it provides the ability to work from home while still being in a classroom full of co-workers.



ROPES

StatesideBPO has specific expectations of trainees during training. These expectations are defined by ROPES.

Responsibility:

While in this class, learners are expected to attend every class, be on time every day.

Openness:

This class will teach learners some new ideas and new ways of doing things. Please be open to this information and willing to learn.

Participation:

Participate as much as possible. The more learners participate, the easier it is to understand the course material. Participation also helps others learn! Most importantly, volunteer to answer questions.

Experimentation:

It is important that learners allow themselves to be creative in this class to learn. Experiment with these new ideas and procedures, and have fun! In Training, feel free to make mistakes. However, refrain from jumping ahead of the Trainer because it can cause the learner to fall behind and get lost during demonstrations.

Sensitivity:

Remember that not everyone in class learns in the same manner. Some people will have more questions than others. There is no such thing as a stupid question. Always be sensitive to the needs of others, and be willing to help!

It's Okay To

- Relax
- Be Yourself
- Have Fun
- Learn
- Ask questions
- Make statements
- Make mistakes
- Disagree
- Take Breaks

It's NOT okay to:

- Have side conversations
- Fall asleep
- Disrespect or interrupt others
- Arrive late
- Argue or complain

Absence

To ensure trainee success and preparedness, 100% attendance is expected and necessary during training. Any absence would result in an irretrievable loss of time and information during this critical initial training period. The Trainer opens the virtual classroom at the start of the class time. Trainees may join the classroom earlier and wait to be accepted into the room. At the end of the training day, log out of the Adobe room immediately. The Adobe room is used to track attendance.

Tardiness

Late arrivals of any length are disruptive to the Trainer and the training class. Being tardy is defined as not being present, ready to begin working at the scheduled time. The learner must communicate with the Trainer via email should they be unable to attend class due to computer problems, tardiness or absence. Any absence or tardiness during training will be documented.

Work Environment

StatesideBPO takes pride in having established a work environment where every employee is valued. StatesideBPO encourages respectful interaction between employees and welcome all constructive feedback. This enables our organization to establish a long-term employment relationship and ensure every effort will be made to support you in your success with us!

Discrimination/Harassment

There is a zero-tolerance policy for discrimination, sexual harassment, or other harassment based on disability, race, color, religion, age, gender, sexual orientation, or harassment based on categories protected under applicable law. Harassment includes, but is not limited to, racist, sexist or ethnic comments, jokes or gestures, or any conduct or statement creating an intimidating hostile or offensive work environment.

Conduct/ Professionalism

All employees are expected to conduct themselves in a professional manner whether in a training class, interacting with management, co-workers, or client. Instant messaging is frequently used as a quick form of communication; we ask that you recognize the importance of respectfully using this tool. Email is another tool used to communicate within the organization and we expect each employee to use this in a professional and appropriate manner. You will be provided a Stateside BPO email address and this email is NOT to be used for personal use.

Disciplinary Action

Documentation is absolutely necessary during the entire training period if any disciplinary issues arise. Trainers, Supervisors and Team Leads maintain appropriate records on all aspects of the employee's performance, conduct, attitude, and demeanor. This can include documentation of poor work, inadequate output, attendance/ tardiness, policy violations, communication problems, behavioral problem This documentation ensures that agents are treated consistently and fairly when they commit infractions of the guidelines set forth by the Training and Development department in connection with Human Resources and the call center.

Trainees/employees may be disciplined at the discretion of StatesideBPO and the policies and procedures listed herein are only guidelines for supervisory actions. These are not intended to be inclusive of every possible situation.

Discretionary judgment must be exercised in the application of these guidelines. However, substandard or unsatisfactory employee performance or behavior is never acceptable, and StatesideBPO must always initiate and communicate preventive or corrective action. The degree and type of action depends on the circumstances and the importance of the employee's infraction or failure to perform satisfactorily, and terminations.

Training Logistics

Classroom schedule may consist of:

- ✚ 9:00 AM – 11:00 AM – Instructor Led Training
- ✚ 11:00 AM – 11:15 AM – Break
- ✚ 11:15 AM – 1:30 PM - Instructor Led Training
- ✚ 1:00 PM – 2:00 PM – Lunch
- ✚ 2:00 PM – 4:00 PM – Instructor Led Training
- ✚ 4:00 PM – 4:15 PM – Break
- ✚ 4:15 PM – 5:30 PM – Independent Study time

*This is subject to change and depends on the start/end time of the class.

Personal Calls/Tasks

During training, provide your full attention. Eliminating distractions such as cooking, answering phone calls, etc. from the home can be challenging but this is critical for all learners to be successful. All learners are required to remain at their workstation during training and only leave their stations when it is absolutely necessary.

Passwords

Each trainee is provided a document to make it easy to remember credentials and URLs. It is the trainee's responsibility to record all credentials on the document and use it as a resource tool on a daily basis. The trainee notifies the Trainer for assistance after the second unsuccessful login attempt.

Key Learnings

All learners are of equal worth and value; all opinions are valued and needed. In order to be successful in this training course, all learners will:

- Learn by Doing
- Learn by Layering
- Participate
- Express their needs and expectations constructively
- Ask questions
- Take risks and make mistakes in pursuit of learning
- Give feedback in an honest way that helps others
- Receive feedback from others, try to understand not defend
- Take responsibility for moving the group forward
- Enjoy and have fun

Review

1. What are ROPES?
2. Why is it important not to miss any time during training?
3. When the Trainer releases the class, all trainees must exit the virtual classroom.

TRUE FALSE
4. Trainees are allowed to take personal calls while class is in session.

TRUE FALSE
5. Who is responsible for keeping track of their credentials for all StatesideBPO/Vivint systems?

StatesideBPO History

Overview

This module outlines the StatesideBPO story, mission and employee model.

Objectives

This module consists of the following topics:

- Outline the StatesideBPO history and our sister company
- State the name of the Chief Executive Officer (CEO)
- Describe the main reason why this business was started

Training Length

15 mins

StatesideBPO Background/History

Our sister company, J. Lodge, was created as a result of inspiration fueled by Jackie Lodge who suffered from Quadriplegia living in N.J. and could only control his wheelchair with his tongue. Businesses would not offer Jackie employment because of his physical limitations. He became bored and desired a role in life. Jackie was very intelligent, but was in a very unfortunate situation beyond his disability.

Jackie's parents had been killed when he was only a boy and the state of New Jersey did not know what to do with Jackie. He had special needs because of his disability but they did not have accommodations for him at the time. Consequently, Jackie was forced to live in a home that was for people with extreme mental disabilities for the majority of his life. There was an opportunity identified between the population of Americans with disabilities that are just looking for a realistic way to reenter the workforce legitimately, and the biggest issues that the BPO industry faces today with the level of frontline call center agents: their lack of education, their lack of skill, and most importantly, their lack of engagement. This inspired Mike Schrider to create J. Lodge in 1999.

The son of Mike Schrider, Andy Schrider, started StatesideBPO (Business Process Outsourcing). J. Lodge offers process improvement and quality assurance solutions. Stateside offers call center operations and speech analytics as well as our award-winning Quality Monitoring. We don't limit the experience of our clients and customers by the traditional call center model.

StatesideBPO Call Center



Mission, Secrets to Success & Culture

Mission

- To provide career opportunities to Americans with disabilities and Veterans.
- Our employees provide better experience because they are better educated and they have more diverse experience.

Secrets to Success

- We offer our clients' visionary contact center solutions, impeccable adherence to quality, dedicated call center operation workforce and results driven feedback.

Culture & Diversity

- Employees are required to act with fundamental honesty and integrity including complying with all laws that govern our business, maintain an ethical and professional work environment.
- Employees are required to treat customers, fellow employees and vendors with respect, dignity, honesty, fairness and integrity.
- Our policy is to comply fully with all laws providing equal opportunity to all persons without regard to disability, race, color, religion, age, gender, sexual orientation and any other protected category by law.

Employee Model

- We are the only company in the US dedicated to fulfilling our clients' needs for highly educated call center agents through the employment of Americans with disabilities. Our processes to recruit, hire, train, and employ people just like you, and this is the key to developing this one of a kind virtual services company. Currently, we have approximately 200 employees.

Key Learning

StatesideBPO was started in 2013 by Andy Schrider. The mission of StatesideBPO is to provide disabled Americans and Veterans with career opportunities in call center operations. Currently, we are the only US company dedicated to fulfilling our clients' need through employment of Americans with disabilities and Veterans.

Review

1. What year did StatesideBPO begin?
2. What does BPO stand for?
3. Who is the Chief Executive Officer (CEO)?
4. Provide the name of the sister company for StatesideBPO.
5. What separates StatesideBPO from other call centers?

Vivint Glossary

Below are some basic Vivint terms:

Account - is the umbrella that all Services are under the letter A appears before the actual number.

Service – The services offered which are housed under a customer’s account. Example: wireless, security, solar, Life lock, space monkey, etc.

Case – Each time a customer calls in open a new case.

Contact Card – This is the customer information profile. You can view and update customer info including phone number and email.

Contacts – Can search for anyone that is associated with an account.

Billing Account – Shows how much, when and why customers pay.

QRF – is a resource specifically for all Customer Care Specialists. QRF Questions answers any questions Customer Care Specialists might have regarding customers accounts or troubleshooting, etc. QRF Escalations takes escalated customer calls. Be sure to follow the proper transfer procedure when transferring an escalated customer.

Customer Care Tiers 2-4 – focuses on more advanced equipment. Transfer a customer if they have any issues regarding their panels, sensors, OAC, cameras, thermostats, door locks, lamp modules, Honeywell, takeover modules, business accounts, and beta products.

Scheduling – works directly with technicians in an attempt to open up appointments for customers when there aren’t any available in Click, or there is a special circumstance. Make sure that you speak with your supervisor or a QRF agent to get approval before going to scheduling. This will make the process smooth and efficient.

Front Desk – is for any issue that isn’t customer based such as someone wanting to verify employment (not a customer verifying a rep).

Monitoring (Central Station) – monitors customer alarms and proceeds with dispatches when required. We should contact monitoring when a customer would like to cancel a dispatch, wants to get information on an alarm event, or would like to set up special monitoring instructions.

Billing – takes payments if a customer is more than 90 days past due, if they want to make their very first payment after being installed or if they want to pay the entire payoff amount on their account.

Claim Resolution– seeks solutions for customers whose home/property has been damaged by our technician or due to a fault in our equipment. For issues regarding this we should submit a home damage case and they will contact the customer. We can call home damage if a customer calls to follow up on an existing home damage case.

Customer Loyalty – works with customers wanting to cancel their service. Anything dealing with cancellation or agreement terms should go to Customer Loyalty.

3 Day ROR – work specifically with new customers that want to cancel. If a customer is still within their right of rescission period (ROR) or have been installed for less than a month we should transfer them to ROR.

Moves and Takeovers – work with customers who are moving and need to transfer their system to their new home, or if someone is going to take over the customer's agreement. If a customer calls in regarding a move appointment (such as canceling or rescheduling) this should be transferred to Moves and Takeovers.

Slams – handles Slam situations. A slam is when a sales rep misrepresents themselves to a customer from a competing company making that customer believe the rep is with that company. Usually this ends up in the customer getting locked into a second agreement without their knowledge. Any situation that is a suspected Slam should go to the slams department.

Inside Sales (NIS) – takes care of potential customers. If someone calls in wanting to get a system, or an additional system they should be transferred to NIS. If they have moved into a home that has Vivint equipment and want to get set up as a customer this would still go to NIS.

NIS Retention – takes care of uninstalled NIS customers that want to cancel. If there are issues on day of install with the tech on-site, reschedule or scheduling conflicts for NIS installs these should also be transferred to NIS Retention. NIS account referral credits would also be transferred here.

Executive Resolution Team - The Executive Resolution team is essentially the customer care for customer care: this team is the highest point of escalation for our customers, they ensure our FSP's safety, they generate specific request documentation, and follow-up on various outbound requests.

Digital Interactions - The Digital Interactions team is divided between two specifications: the Chat team, which handles all inbound chats on vivint.com and the Priority Social Media team, which handles customers and other concerns that escalate to media pages and reputation sites.

Friends and Family/VIP - Vivint's Friends and Family/VIP team handles employee accounts, employee referral accounts, and VIP accounts. You can tell if someone's account is a Friends and Family account in Salesforce by checking the Original Sales Office; if the office has Friends and Family included it has been set up by the Friends and Family team. This team can be reached at 801-221-6828 or friendsandfamily@vivint.com

Customer Satisfaction Team - The Customer Satisfaction Team is the team that reviews and collects information from the surveys that are sent out to our customers after the majority of phone calls; they will always attempt to contact the customer to discuss their concerns and resolve them




Daily Tools





Overview of StatesideBPO/Vivint Tools






Being successful in training starts with keeping track of credentials. During training, you will be introduced to each program listed in this document. Be sure to take a moment and record your assigned user name and password as they are provided during training. This ensures that the account is not locked out due to an invalid attempt and allows our class to progress at its normal pace. Additionally, use this document to serve as a reminder of all the programs to have up and ready to go prior to taking live calls. Preparation is key towards delivering “world class service” because it shortens the time spent on the phone with the customer.



Additional Tips/Reminders

- Review your work email (also known as Rackspace) each day you are scheduled to work. Be proactive this way you stay current on changes.
- When entering credentials, do not enter them more than twice. Contact the Trainer after the second unsuccessful attempt for assistance. This prevents locking the account.
- Trainers and learners share the same Salesforce account. If one person inputs the incorrect credentials, the account remains locked for 30 minutes. After this time frame, the account is unlocked automatically and may be used again.
- If Team Viewer or Spark must be re-installed, use this link: <http://statesideportal.com/download/>

Vivint	Software Description	URL/Icon/Notes	User name	Password
Rackspace 	Stateside email platform used to send and receive work related emails using a Stateside email address.	https://apps.rackspace.com/a/index.php?version=full		
Spark 	Instant Messaging Tool used to communicate questions with Support Staff.	Icon used from VMware Horizon desktop. Server name: im.statesidebpo.com		
Team Viewer 	A system used by Stateside to help troubleshoot technical issues with the computer or individual programs.	Icon on the personal desktop		

<p>Stateside Portal</p> 	<p>A portal created to be a part of the Stateside Community! We share important news, shining stars, job opportunities, along with events and current incentives going on for our employees.</p>	<p>http://statesideportal.com/</p>		
<p>Stateside Training & Development Library</p> 	<p>Stateside specific page where training material, examples and videos are stored specific to Vivint Tier 1 and Tier 2. This is a hidden section within the portal that only Vivint staff has the access to view.</p>	<p>http://statesideportal.com/vivint-training-development-library-2/</p>		
<p>VMware Horizon Client</p> 	<p>The virtual desktop is a gateway to access the main systems for Vivint. Also known as Dizzion. Dizzion is the company that created the virtual desktop.</p>	<p>Icon on the personal desktop</p>		
<p>Salesforce</p> 	<p>The system used to access the customer's account, service type, billing information, access Merlin, Knowledge, Platinum and Alarm.com.</p>	<p>Launch Google Chrome from VMware.</p> <p>Training URL: test.salesforce.com</p> <p>Production URL: vivint.force.com</p>	<p>Training ONLY: cctrainee@vivint.com</p>	<p>Training ONLY: Training2016</p>

<p>Merlin</p> 	<p>This is used to create cases to document details about the call. Merlin also provides step-by-step instructions. Additionally, Merlin lists hyperlinks to knowledge articles that provide in-depth procedural steps/video/pictures.</p>	<p>Access this tool from within Salesforce.</p>	<p>No separate credentials required.</p>	
<p>Knowledge</p> 	<p>A Vivint source of information with instructions, processes, telephone number for all departments, pictures about devices, etc. Knowledge is not used to create cases.</p>	<p>Access this tool from within Salesforce.</p>	<p>No separate credentials required.</p>	
<p>Vivint Academy</p> 	<p>Also known as Vivint University. The Vivint learning tool is used to watch videos and complete knowledge checks (all in the pursuit of learning!)</p>	<p>Vivint.academy.com/ (Must be accessed from within VMWare Horizon Client virtual desktop)</p>	<p>No separate credentials required.</p>	
<p>Softphone</p> 	<p>Softphone links the calls to inContact. This pushes calls to inContact.</p>	<p>Locate the desktop icon.</p>		
<p>inContact</p> 	<p>The phone system used to receive, make, conference and transfer calls.</p> <p>Upon completion of training, inContact is used to track employee hours for payroll.</p>	<p>https://login.incontact.com/inContact/Login.aspx</p>		

<p>Alarm.com Dealer Site</p> 	<p>An external site used for programming and troubleshooting Go!Control panels and other sensors available. This is accessed from within Salesforce.</p>	<p>Access this tool from within Salesforce. Upon locating the Service Details, click Launch Dealer Site.</p>	<p>No separate credentials required.</p>	
<p>Platinum Dealer Site</p> 	<p>An external site used for programming and troubleshooting SkyControl panels and other sensors. This is accessed from within Salesforce.</p>	<p>Access this tool from within Salesforce. Upon locating the Service Details, click Launch Dealer Site.</p>		

Vivint Overview

Overview

Learn about Vivint commitment to customers, purpose and the methods to attract new customers.

Objectives

This module consists of the following topics:

- Identify the value that Vivint brings to their customers.
- Discuss the process of obtaining new customers.
- State the difference between Sales Rep, Slams and National Inside Sales
- Outline the procedure for when the Sales Rep, gets the customer to agree to the service
- Discuss services that Vivint offers
- The Vivint Package Price List
- Provide basic Vivint equipment information
- Explain the different between Pre-install survey and Post-install survey
- Technician installing the equipment in the home
- Customer with additional questions contacts Customer Care after installation

Training Length

15 mins

Vivint Purpose



Vivint's Purpose is to redefine the home experience through intelligently designed products and services delivered to every home by people to care.

Vivint Values



- **Honesty and Integrity Come First** – Do the right thing
- **Customer Obsession is Our Advantage** – A relentless passion to serve the customer
- **Innovation is Essential** – Today's innovation is tomorrow's lifeblood
- **We Win Together** – Individuals win games; teams win championships
- **Exceptional is Expected** – Talk is cheap; create value, not just motion
- **We Give Back** – Helping people is core to our DNA

Making A Difference

MyStory

Real-life experiences showcasing the impact Vivint has on the lives of our customers

My house was saved thanks to Vivint! I can sleep soundly knowing I am fully protected.

"I started a load of laundry and left the house to do my grocery shopping. After pulling into the parking lot I received a phone call from Vivint letting me know they had detected a fire in my house and that they have sent the authorities. I rushed home and found 3 firetrucks and 30+ firemen. They informed me that the dryer started on fire but since they got there so quick they detained the fire to just the dryer. My house was saved thanks to Vivint. I can sleep soundly knowing I am fully protected."

-Kayden N., Payson, UT
Monitoring Rep: Nena Simmons
Install Tech: Ryan Erdmann

Vivint's success is measured by how well we take care of our customers every time we interact with them, every day of the year. MyStory messages connect all of us to our customers and show that we're making a difference in their homes, families and lives.

I hope you enjoy MyStory. Thanks for all you do to make Vivint great!

-Steve Dixon
SVP Customer Experience

No matter where you are, work, shopping, holidays or even sleeping for that matter, Vivint is there to protect your home and valuables 24/7.

"I had Vivint install an alarm system in my home a few years back. At first I was skeptical and really didn't want the system, but I went ahead and got it installed. Shortly after, I got a job that requires me to work overseas. Because I live by myself, it meant that my home would be vacant every other month. At that point, the system gave me peace of mind while I was away. Today, however, as far as I am concerned, the system has just paid for itself tenfold.

I am currently out of the country for work. This morning, I received an email from Vivint that my glass break sounded my alarm at 2:50 am. Vivint first tried to contact me via telephone. Because I didn't answer, they called the RCMP who was then dispatched to my house. The police walked around the premise and found that someone broke the window on my garage door so they could gain entry. The would-be thieves did get away, but were not able to get into the house thanks to Vivint.

No matter where you are, work, shopping, holidays or even sleeping for that matter, Vivint is there to protect your home and valuables 24/7."
-Daryl H., Benticion, BC

Monitoring Rep: Unlisted
Install Tech: Jessica McIntyre

Learning Activity

1. Access the following link: www.vivint.com. In the box below, write various topics learned about Vivint:

2. Access the following link: <http://www.vivint.com/company/customer-stories>. This provides information about how Vivint has made an impact on a customer. Which story stood out the most?

Vivint is the present and future of the intelligent living by using offer the following services:



- Security:** The control panel is the computer that arms and disarms the security systems, communicates with each installed component, sounds the alarm when a security zone is breached, and communicates with Central Station. Central Station is the 24x7 monitoring center located in Provo, Utah and St. Paul, Minnesota. This includes free Vivint mobile app, Vivint live support service, event notifications and severe weather alerts. Standard security equipment includes panel, smoke detector, door & window sensors, motion detector and yard sign.
- Automation:** Home convenient devices such as Energy Management, video camera, electric door locks and video surveillance allow customers to control their devices from the control panel or remotely.
- Internet:** (also called Voice Over Internet Protocol - VOIP) Vivint offers fast reliable wireless (that includes 100 megabits per second) to individuals that live in the United States.
- Cloud Storage:** (also called Space Monkey) is an automatic back up device that works with iOS, Android, Mac and Windows. It can store more than 300,000 photos. Customers can share information easily and backup files from everywhere.
- Solar:** Solar panels are installed on the roof of the home to provide simple and affordable clean energy.

Note: While Vivint offers all these services to their customers, StatesideBPO Vivint Customer Care Specialists ONLY handle calls from United States and Canada customers for security service. The other services are handled by various departments.

Let's take a moment and review the Futurism video from the CEO/Founder of Vivint Todd Pederson.



1. List important points from the video.

2. What are the three P's?

3. Explain how Customer Care Specialists fit into the larger scheme of things.

4. How can Customer Care Specialists take from what was learned in the video and implement them on calls?

5. How does Vivint create a competitive advantage?

VIVINT Business Process

Step 1:

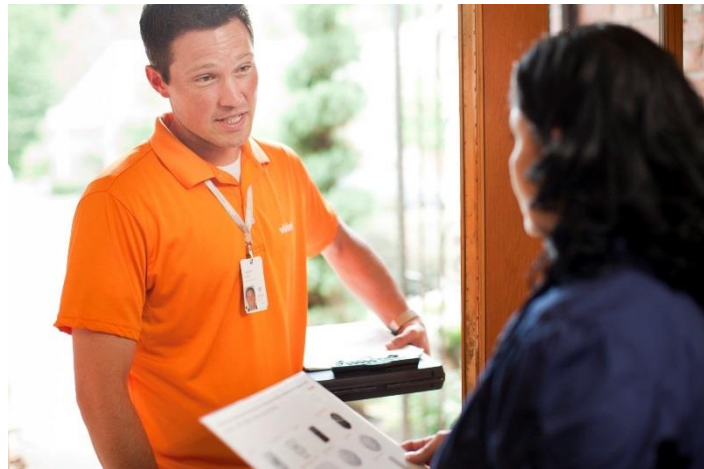
Below are the sales methods used to attract new customers:

- **Direct To Home:** (DTH) A door to door Sales representative. The Sales representative wear a uniform with a Vivint Badge. This is how potential customers are made aware that they are authorized to work at Vivint.
- **National Inside Sales:** (NIS) A sales representative that handles only inbound calls from potential customers.
- **Channel Partners:** A sales representative that handles inbound and makes outbound calls to potential customers.



Step 2:

If the customer agrees to the service, the Sales Rep/Slams/NIS obtains their basic information (i.e. name, telephone number, email address).



Step 3:

The Sales rep calls Account Creations, the rep completes a pre-install survey and perform a credit check. After finishing the call with Account Creations, the Sales reps discussions the package list. There are four 2016 package lists.

They are

- 1) Smart Protect
- 2) Smart Protect & Control
- 3) Smart Complete
- 4) Total Home

The Sales rep completes the Schedule and Equipment Services paperwork. This is an agreement that includes all the devices and services the customer would like to have installed.



Step 4:

The technician arrives at the home and installs the equipment.



Step 5:

The technician calls Account Creations and the rep speaks with the customer and completes a post-install survey. The Account Creations rep also discusses important information such as their monthly service fee, cancellation policy, etc so the customer is aware of Vivint policy. If the customer is being lead by the Sales rep in anyway, they ask the Sales rep to advise the customer of the agreement and they have to call back.



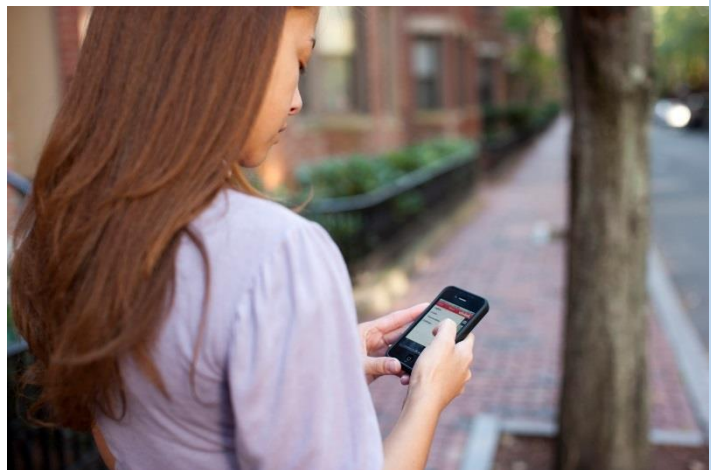
Step 6:

After everything is set with Account Creations, the technician teaches the customer to use their system, the app, and where to call with additional questions. The home is protected.



Step 7:

If the customer has any additional questions after the technician leaves such as , the contact Customer Care.



Key Learnings

Vivint prouid their business on making their customer's life easier. Their goal is to make the customer's experience simple. Vivint offers services such as home security, solar, wireless internet, cloud storage and so much more. When a Sales professional speaks with the customer, they agree on the packages that the customer would like to purchase. Then they have a technician come out and install the equipment. Afterward any questions or concerns the customers has, they contact Customer Care for assistance.

Review

1. What is Vivint's purpose?
2. List the 6 Vivint Values.
3. List three services that VIVINT offers that StatesideBPO Customer Care Specialist do not handle?
4. What are the three P's from the Futurism video?
5. What is the difference between DTH and NIS?
6. How many times does the customer speak with Account Creations?

Customer Care Expectations

Overview

This section discusses the Vivint Customer Care structure and performance metrics to identify above, average, or low performers.

Objectives

This module consists of the following topics:

- Provide Customer Care Specialists Performance metrics
- Explain Customer Care Tiers

Training Length

15 mins

Performance Metrics

Key Performance Indicators (KPI) are measurements used to identify how effective a Customer Care Specialist is in achieving the overall goals for the organization. The performance standard are expected to be achieved six weeks from the date of completion of training.

Definitions of Key Performance Indicators:

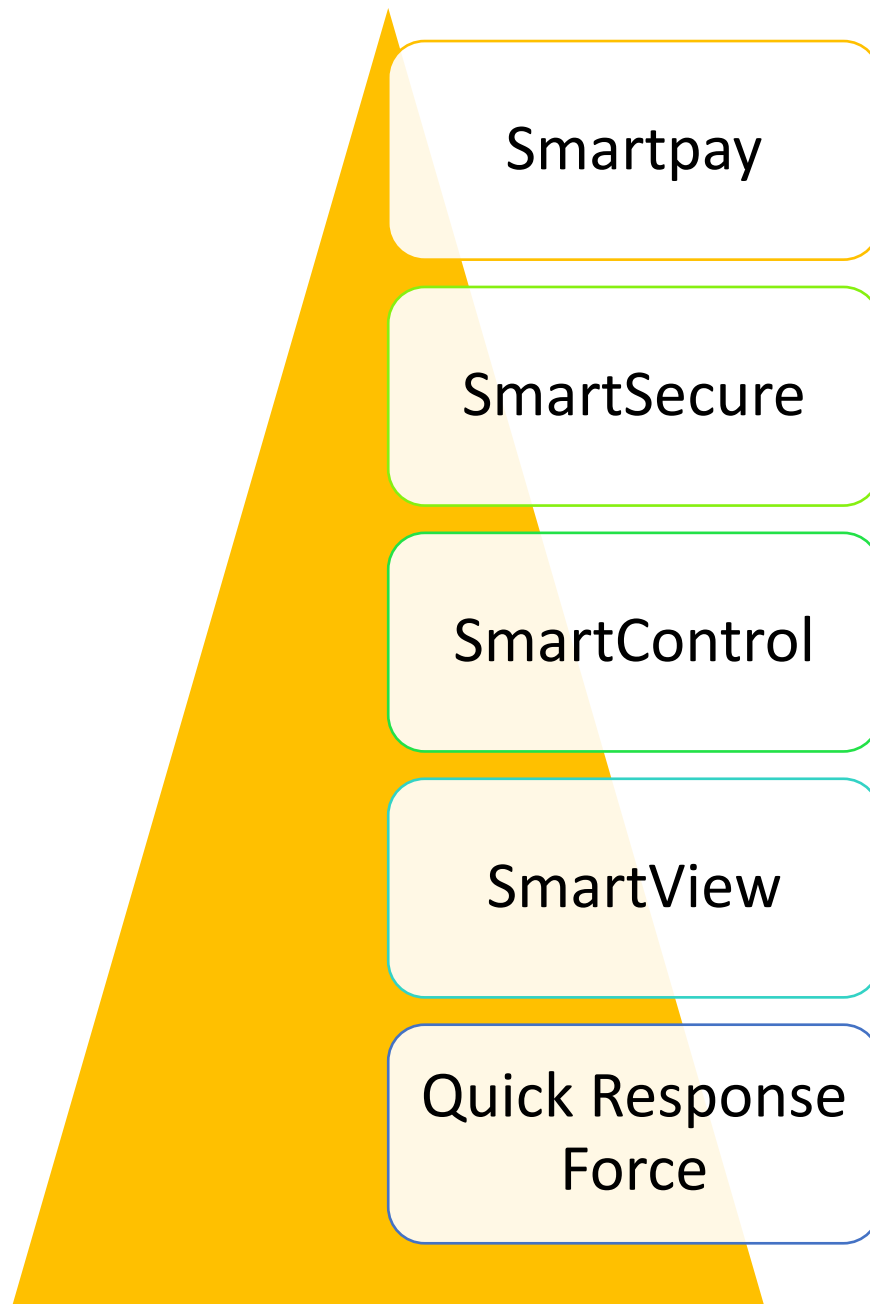
- **ACW:** After Call Work is defined as the average duration of time spent after the call has disconnected before agent makes him/herself available to take next call. It is calculated by dividing the total acw time by the number of calls handled.
- **AHT:** Average Handle Time is defined as the average duration of call and includes talk time, hold time, and after call work "wrap up" time. It is calculated by dividing the total handle time by the number of calls handled.
- **aNPS:** Agent Net Promoter Score measures the agent performance from the customer's point of view in regards to the service provided specifically by the agent (measured from 0 to 10, calculated the same as NPS)
- **ATC:** Availability to Customer is the measurement of how much time is spent by the agent engaged with the caller or sitting available for a call. It's a combination of available time and talk time divided by total scheduled available time. We control available time, agent controls talk time.
- **Compliance:** Compliance is the documented process of ensuring that the agents are not putting company at legal risk.
- **FCR:** First Call Resolution is defined as the number of calls handled that were resolved on the first time calling. (Phone numbers associated with the original phone number that calls back within 5 days negatively affect this metric.)
- **Hold Time:** Hold time is the total amount of time a customer is placed on hold for the duration of the call.
- **Hold %:** Hold Percentage is calculated by the total instances of Hold divided by total calls. Theoretically an agent can have over 100% hold% if they place all calls on hold more than once. We also calculate average hold time which is the average duration of the hold instances.

- **NPS:** Net Promoter Score is an index ranging from 0 to 10 that measures the willingness of a customer to recommend a company's products or services to others (9&10 minus detractors 0-6)
- **Quality:** Provider to attain quality assurance rating using VIVINT provided scoring tools at levels that are equal to agents performing the same functions with similar tenure.
- **Shipping Fee Collection:** When shipping a package to a customer (such as yard sign, stickers, new sensor, etc.) a \$4.95 shipping fee (or \$14.95 for expedited shipping) should be applied. Total fees/total fee opportunities
- **Trip Fee Collection:** When dispatching a field service technician, current policy is for a \$49 trip fee to be applied. Total fees/total fee opportunities
- **Work Order Rate:** Work Order rate is calculated by taking the total work orders created divided by total cases taken

KPI Metric	Tier 1
AHT	4.93
ACW	.23
Hold %	N/A
Hold Time	1.01
ATC	76.47%
Quality	64.13%
Compliance	99.10%
FCR	81.77%
WOR	N/A (Applies to Tier 2)
NPS	62.68
aNPS	72.97
Trip Fee	N/A (Applies to Tier 2)
Shipping Fee	N/A (Applies to Tier 2)

Customer Service Overview

There are five Customer Care tiers and they are:



Each tier handles the following call types:

- **SmartPay (Tier 1)**
 - Account Maintenance
 - Payment
 - Billing Questions
 - Correspondences
 - Basic account center/Phone App

- **SmartSecure (Tier 2)**
 - Panels (Go!Control And Sky) & Dealer Sites
 - TS1 & PAD1 (Secondary panels)
 - RF Sensors
 - Online Account Center

- **SmartControl (Tier 3)**
 - Thermostats (including nest)
 - Lamp Module
 - Doorlocks
 - Honeywell

- **SmartView (Tier 4)**
 - Cameras (In/out door) & Doorbell cameras
 - Amazon Echo
 - Internet issues & Router Issues
 - Space Monkey

- **Quick Response Force (Tier 5)**
 - Escalations
 - Questions

Call Structure

Overview

This section explains the main components that Customer Care Specialists relay on each call.

Objectives

- Explain the structure of a Vivint call
- Create a customize greeting
- Outline the best part in the call to launch Merlin
- Define acronyms such as L.O.V.E. and H.O.M.E.

Training Length

110 minutes

Examples of Best and Worst Interactions

In a group discuss good and poor customer interactions. Use the section below to make notes. Choose someone to represent the group as a spokesperson. After returning to the main classroom, the group's appointed spokesperson presents examples.

Think of a personal experience when someone provided excellent customer service. What made the interaction excellent?

Think of a personal experience when someone provided poor customer service. What made the interaction poor?

Let's watch two videos. Be prepared to share with the class information about each video. Use the sections below to take notes:

The first video is about a good call center experience. The Trainer plays the second video. Pay close attention and use the section below to make notes.



Notes:

The second video is about a bad call center experience. The Trainer plays the second video. Pay close attention and use the section below to make notes.



Notes:

Call Structure consists of 5 parts:

1. Greeting
2. Acknowledge and Engage
3. Discovery
4. Answer
5. Closing

Now, let's break down each of the 5 parts of the call structure.

Greeting

- Welcome and Brand Vivint
- Provide your name, department and ask for the caller's name
- Ask "How can you help?"
- Provide a reassurance statement
- Ask for their primary telephone number
- Ask for their verbal passcode

Ingredients for a proper greeting:

Welcome and Brand Vivint	Provide Your Name, Department and ask for the caller's name	How can you help?	Provide a reassurance statement	Ask for their primary account number	Ask for their verbal passcode
"Welcome to Vivint Smarthome"	"This is _____, your Smartpay specialist. Whom do I have the pleasure of speaking with today?"	"How can I help you today?"	"No problem. I have been extensively trained on _____ and can easily help you with that."	"In order to better assist you, may I ask you a couple of questions?" (YES) "May I please have your primary telephone number on the account?"	"Thank you for that information! May I please get your verbal passcode for the safety and security of your system?"

Greeting Example:

“Welcome to Vivint! This is _____, your Smartpay specialist. Whom do I have the pleasure of speaking with today?” Excellent, thank you _____. How can I help you today? No problem. I have been extensively trained on _____ and can easily help you with that. In order to better assist you, may I ask you a couple of questions? May I have your primary telephone number on the account? Thank you for that information! May I please get your verbal passcode for the safety and security of your system?”

Acknowledge & Engage

- Reframe the customer’s situation to ensure you understand why they are calling in.
- Empathy is crucial here. Show empathy by letting them know that Vivint understands how they may feel and realize the personal impact.
- Reassure the customer again that you will be able to resolve their issue.
- Let the customer know about the short survey they will be emailed after the call.
- Launch Merlin (for applicable tasks) start adding case comments or reopen an existing case if the issue was worked on in the past **five days**.

Example 1:

“I can definitely help you with (reframe specific question). Also, we’re always looking to get better, so a small survey is going to be emailed to you after this phone call. I would appreciate any feedback you have about this call and your overall experience with Vivint.”

Example 2:

“I’m sorry that you are having issues with (reframe specific issue). I know that can be frustrating so I’m going to do everything I can to take care of this quickly. We’re always looking to give quality service, so a small survey will be emailed to you after this phone call.”

Discovery

- Do not jump right into troubleshooting. Ask dynamic questions such as:
 - o *Was equipment previously sent?*
 - o *Was the billing cycle previously changed?*
 - o *Has this issue happened before?*
 - o *Did a technician come out to the home in the past 45 days?*
- Make sure to find the root cause if the issue and update the case comments with issues and troubleshooting steps.

Answer

- Before telling the customer the issue, give the customer an overview of how you came to this conclusion. Examples include:
 - *I am seeing the charge on (date) for the amount of (\$\$) is that correct what you see?*
 - *This is why I am see the charge of (\$\$) of your account.*
 - *The reason why I am seeing the charge for (\$\$) on (date) is due to the month before, do you have your statements in front of you so we can go through this together?*
 - *Walk the customer through the steps*
- Always clarify the changes to ensure this is what the customer wants.
- Don't forget to document the resolution (what fixed the issue).

Vivint Call Structure Job Aid

Greeting

- Mention **Vivint SmartHome**, your **name** and **department** in your introduction.
- Ask for the **customer's** name and **how you can help** them.
- No matter why they are calling in, **reassure them that you are able to help them**.
- Verify customer after pulling up the account.

Example:

Thank you for calling Vivint SmartHome. This is Jeff, your Smart Pay Specialist. Whom do I have the pleasure of speaking with today?" "Excellent, thank you (customer's name). How can I help today?" "I can absolutely help you with (customer's question). Can I get some information to pull up your account, as well as your verbal passcode?"

- Below is an alternative way to convey your greeting:

Welcome and Brand Vivint	Provide Your Name, Department and ask for the caller's name	How can you help?	Provide a reassurance statement	Ask for their primary account number	Ask for their verbal passcode
"Welcome to Vivint SmartHome"	"This is _____, your Smart pay Specialist. Whom do I have the pleasure of speaking with today?"	"How can I help you today?"	"No problem. I have been extensively trained on _____ and can easily help you with that.	"In order to better assist you, may I ask you a couple of questions?" (YES) "May I please have your primary telephone number on the account?"	"Thank you for that information! May I please get your verbal passcode for the safety and security of your system?"

<p>Acknowledge & Engage</p>	<ul style="list-style-type: none"> • Reframe the customer's situation to ensure you understand why they are calling in. • Empathy is crucial here. You can show empathy by letting them know that you understand how they may feel and you realize the personal impact. • Reassure the customer again that you will be able to resolve their issue. • Let the customer know about the short survey they will be emailed after the call (<i>must be mentioned at the beginning of the call – Not the end</i>) • Launch Merlin and start adding case comments or reopen an existing case if the issue was worked on in the past five days. <p>Example 1: “I can definitely help you with (reframe specific question). Also, we’re always looking to get better, so a small survey is going to be emailed to you after this phone call. I would appreciate any feedback you have about this call and your overall experience with Vivint.”</p> <p>Example 2: “I’m sorry that you are having issues with (reframe specific issue). I know that can be frustrating so I’m going to do everything I can to take care of this quickly. Also, we’re always looking to get better, so a small survey is going to be emailed to you after this phone call. Mr/Mrs, at the end of this call we will email you a survey regarding your call with us today. Your feedback will help us improve our overall customer experience and satisfaction. We appreciate all and any feedback you can provide.”</p>
<p>Discovery</p>	<ul style="list-style-type: none"> • Use Merlin to assist the customer. • <u>Do not jump right into troubleshooting.</u> Ask dynamic questions <p>Example:</p> <ul style="list-style-type: none"> ○ What do you see on your panel? ○ Has anything changed recently that could cause the issue? ○ Has this issue happened before? ○ How long has this been occurring? <ul style="list-style-type: none"> • Make sure to find the root cause if the issue, and update your notes with issues and what you did to troubleshoot
<p>The Answer</p>	<ul style="list-style-type: none"> • <u>Before troubleshooting</u>, give the customer an overview of what the over-the-phone troubleshooting will be like: <p>Example:</p> <ul style="list-style-type: none"> ○ In order to reboot your panel you will need to open the panel and remove the battery, plus disconnect the wall outlet. I can give you simple directions on how to get this done. ○ I’m seeing that your battery is low. You will need to open the sensor to replace the battery. I can easily walk you through the steps now if you have time? ○ With a tamper alert I need to have you open the sensor to test this, can you reach the sensor so I can walk you through this? <ul style="list-style-type: none"> • Walk the customer through the steps • Always test the system functionality after troubleshooting to ensure it works properly. • Don’t forget to note the resolution (what fixed the issue).
<p>Closing</p>	<ul style="list-style-type: none"> • Always ask “What else can I help you with?” rather than “is there anything else I can do for you?” This will encourage the customer to uncover all issues, preventing future call backs. • Thank your customer for calling and add any remaining case comments. (<i>Not required to say Vivint at the end of the call</i>)

Learning Activity:

The Trainer splits the class up into groups of 3-5 individuals. Brainstorm and come up with at least three different ways to relay the greeting. After rejoining the main classroom, the Trainer makes notes of each greeting on the whiteboard.

Use this section to make notes:

20 Questions

Instructions: Let's play 20 questions! One person from class thinks of an animal. Everyone else in the class can ask one question in order to guess the animal.

Complete notes on the key points learned from 20 questions.

Best and Worst Customer Interactions

Instructions: The Trainer divides the class into groups. Half of the teams will be labelled “B” and the remaining half as “W”. Tell them that “B” stands for Best and “W” stands for Worst. Group B brainstorms within the team and identifies the best customer service they ever received and what made it great. Group W brainstorms to identify the worst customer service they ever received and what made it so awful. After the breakout sessions, the Trainer joins the trainees into the main group to collaborate.

Describe what a customer means to you

Instructions: Write in the box, in one word or phrase what a customer means.

Team Pictionary

Instructions: The Trainer relays the instructions to the entire class.

List key points learned from this activity.

Jargon

Instructions: The Trainer uses the whiteboard to list terms and definitions.

List key points learned from this activity.

Logical, Order, Visual & Emotional

How can Customer Care Specialists be customer obsessed? By living and breathing the Core Value to save customers. Vivint does not want customers to have a bad experience and then choose their competitor such as Google, Northstar, AT&T, Apple, etc. More and more businesses are launching Smarthome products and services. Always keep that in mind. Let's be superstars and rise above the competition! The acronym L.O.V.E. stands for Logical, Order, Visual and Emotional. This represents the different ways that someone learns information.

Logical: They are logic based and things need to make sense to them.

Order: Keep your instructions in order and simple such as how to remove the batteries steps 1-5. Don't omit a step. That's important to them.



Visual: This person needs pictures to understand. You may need to direct your customer to <http://support.vivint.com>. You can use this to provide your step-by-step instructions to give your customer the visuals they need.

Emotional: You may speak with someone who is confused, frustrated, angry, etc. It is our responsibility to recognize this up front and tailor our communication to address their specific issue. It's best to let an angry/frustrated person vent first before you say anything. Then ask dynamic questions. Someone that is confused, you may have to start by asking dynamic questions to get a clear understanding of their issue.

Honesty, Outstanding, Measured & Engaged



Honesty:

Are you providing accurate information to your caller? Don't provide information you think is correct. Research and use your resources such as your Manager, Supervisor and QRF to know this information is correct. One call resolution is important! Unnecessary callbacks present a negative image of Vivint and we don't want that.

Outstanding:

Consider these questions:

- How can you be different?
- How can you go above and beyond the rest?
- How can you make a positive impact in the caller's life?

Example – If the customer cannot log into their online account.

Will you be the type of Customer Service Specialist that says click forgot password and follow the instructions in your email? Then just end the call.

Or

Will you be the Customer Service Specialist to advise to click forgot password and **wait on the line** until the customer confirms that they are logged into their account? That's the difference between being mediocre and above average.

Measured:

How do you think the customer will rate your performance on the call?

Example – Someone that is helpful, respectful, and caring will be recognized by the customer as providing great service.

Engaged:

The pleasantness in your voice is key to being engaged by your customer. Don't treat them like an interruption in your day. Give them your full attention. Put away distractions such as cell phones, word puzzles, etc. Use polite words such as "Please", "May I", "Thank You". Treat them how you want to be treated. Example - If the customer mentions that they just had a new baby. Don't ignore it! Say something human like *"Congratulations on the newest addition to your family."* Example – If the customer mentions that their spouse just passed away and they did everything for them. They have no idea how to use panel. Don't ignore it! Say something human like *"I'm so sorry for your loss. I know you are experiencing a difficult time. I'm here to help you. Let's walk through some basic steps about your panel first."*

VM WARE Horizon Client

Overview

The following steps will assist you to successfully download and setup the necessary software to access your VMware Desktop:

Objectives

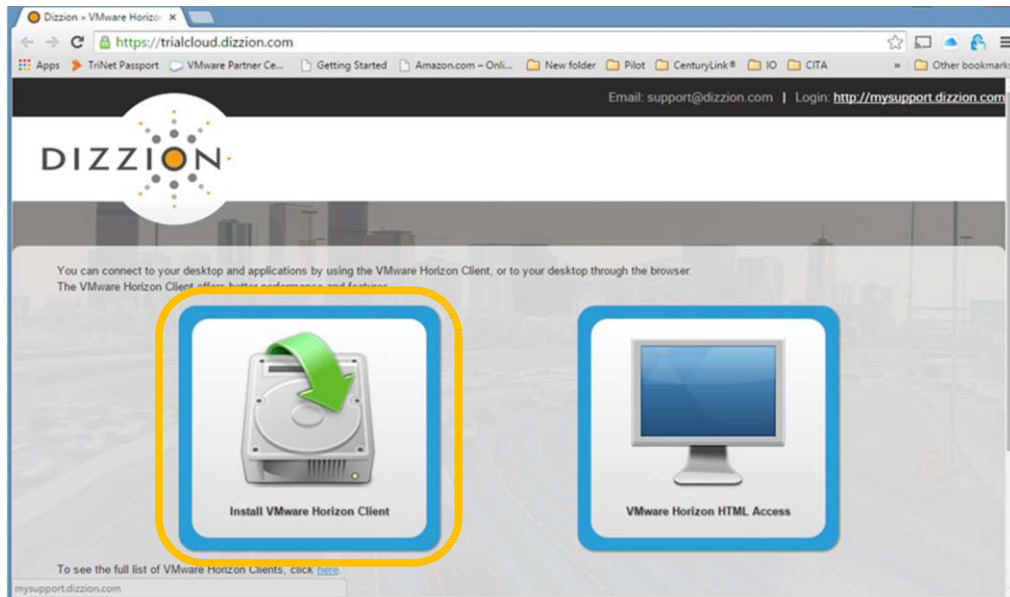
- Install VM Ware on the computer
- Add the Server name
- Select the proper desktop from the available options
- Log into VM Ware
- Ensure that assigned credentials are functional
- Navigate between VM Ware and the personal desktop
- Log out of VM Ware

Training Length

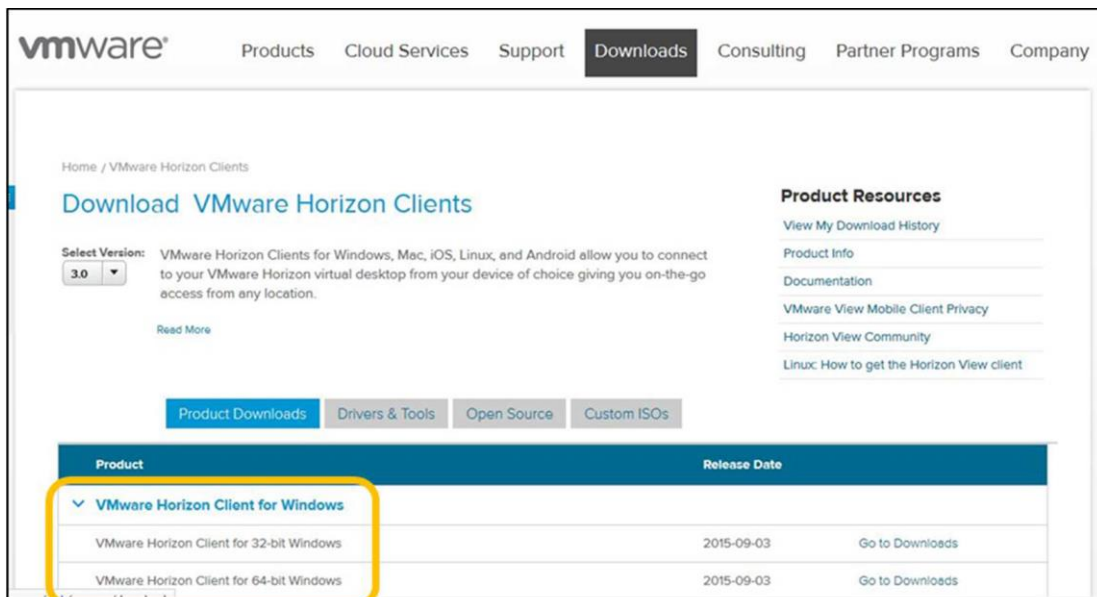
35 mins

Step 1 - Downloading the Horizon View Client

- Open a preferred browser and navigate to <https://stateside.dizzion.com> (supported browsers include Chrome, Internet Explorer, and Firefox)
- Click the Horizon View Client download link (hard drive picture) on the left side of the screen.



- Click the appropriate View Client to download and install onto the local desktop.



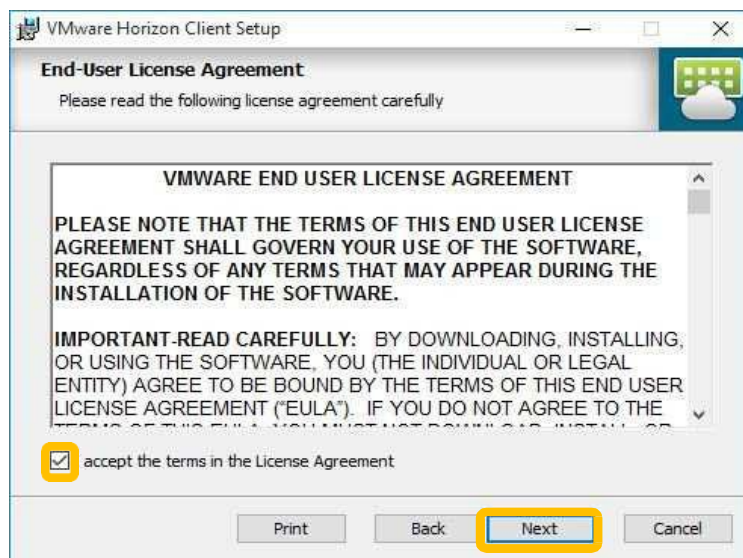
- A download window appears and when the download is finished, click "Run".

Step 2 – Installing the Horizon View Client

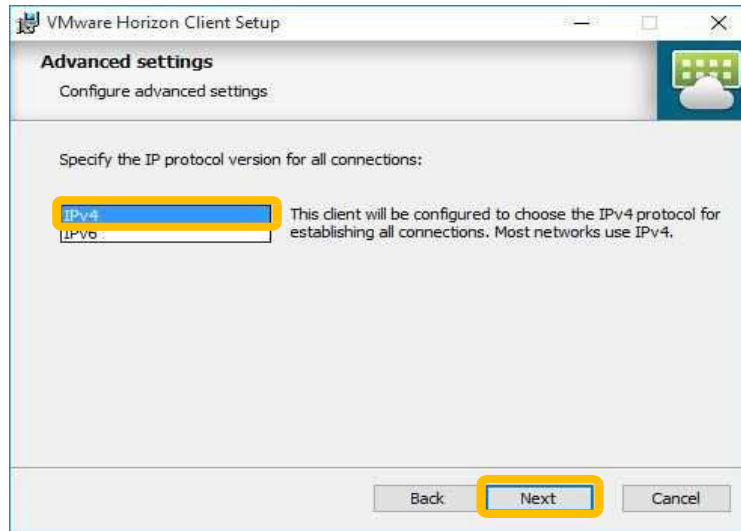
- Click "Next".



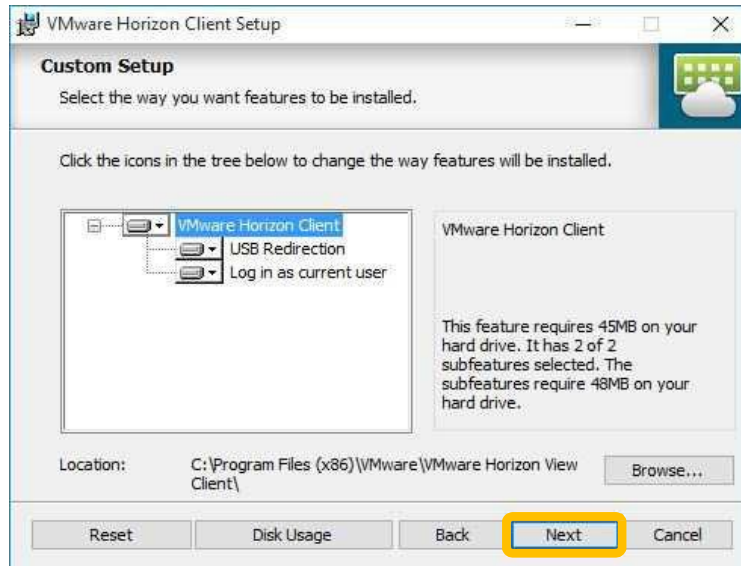
- Click "I accept" check box and then click "Next".



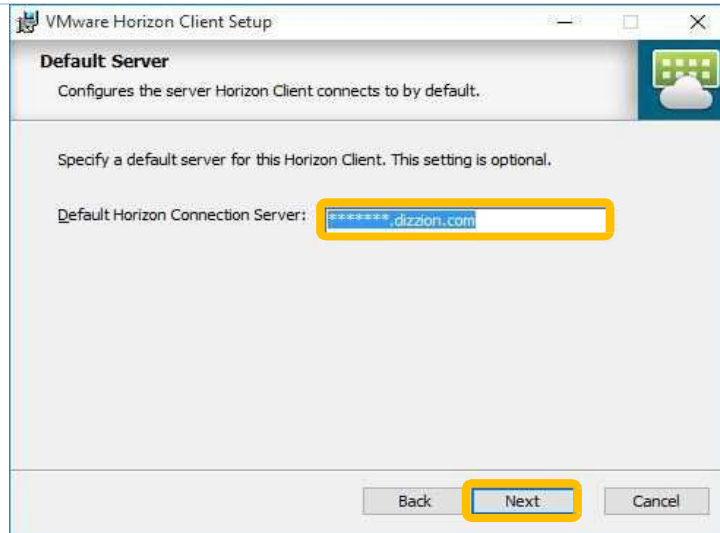
- Choose "IPv4" and then click "Next".



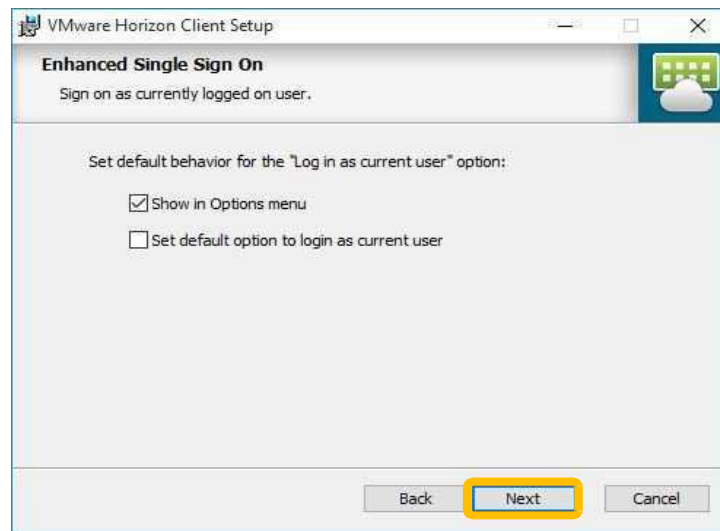
- Leave the install settings as default and click "Next".



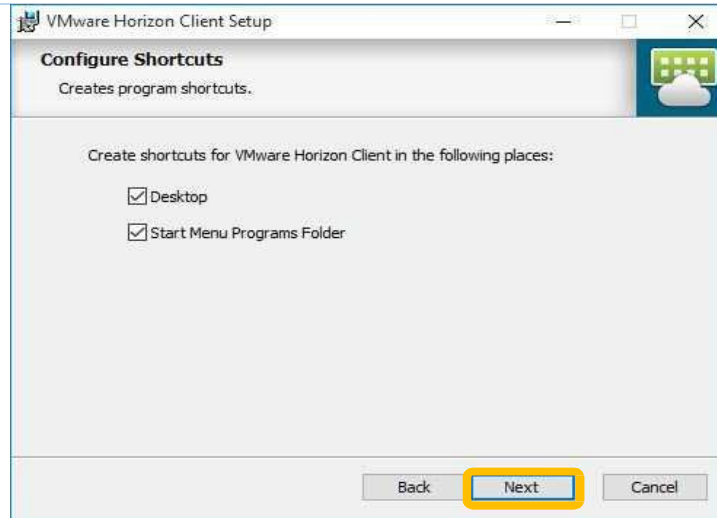
- Type your Connection Server information: stateside.dizzion.com into the text box and click "Next".



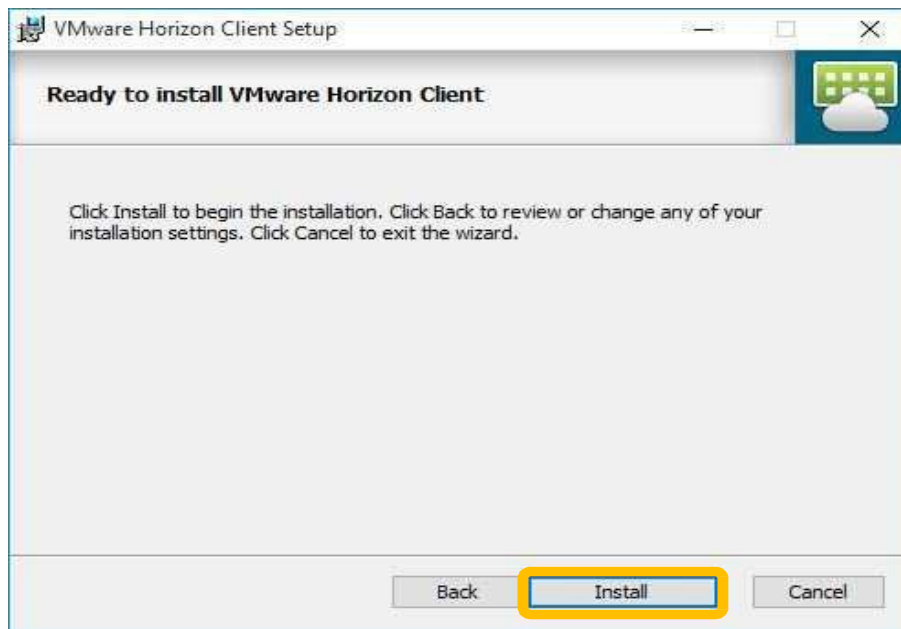
- Click "Next" to continue.



- Click "Next" to proceed.



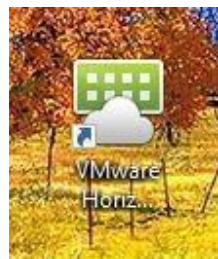
- Click "Install" to continue.



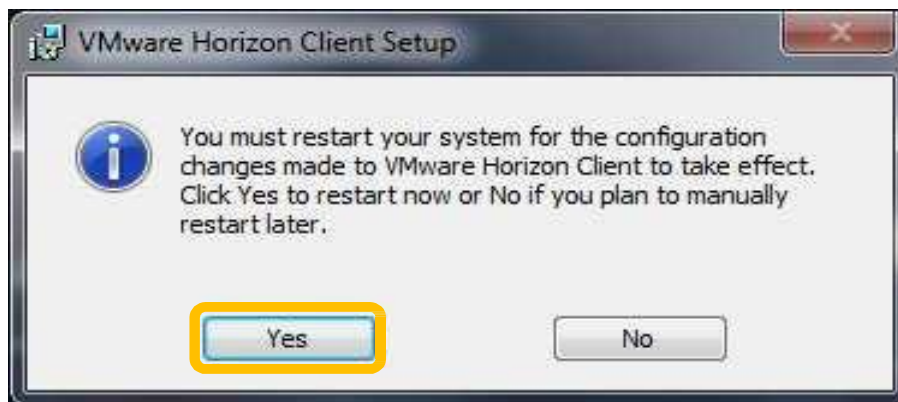
- Click "Finish" and the software is installed.



- The VMware Horizon Client icon appears on the desktop.

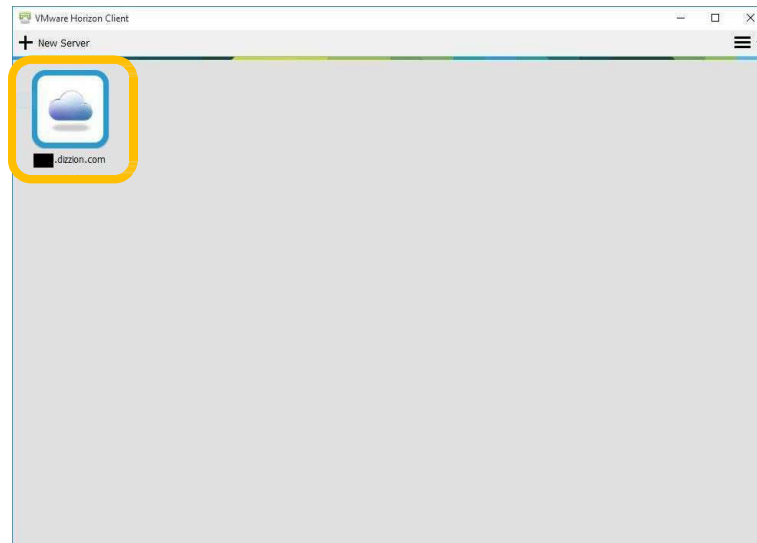


- Should the following pop-up appear, answer Yes to restart the computer.

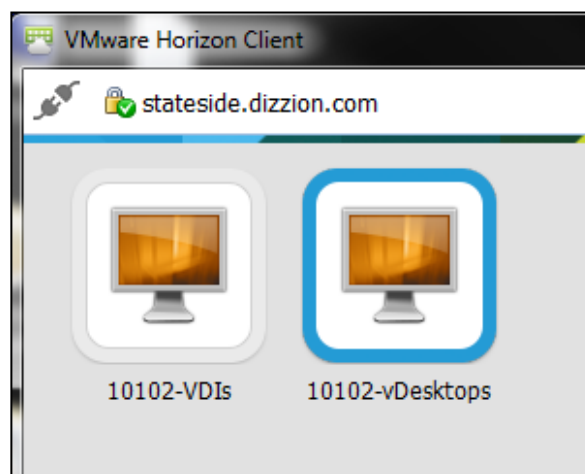


Step 3 - VMware Horizon View Client (Logging into the Cloud Desktop Session)

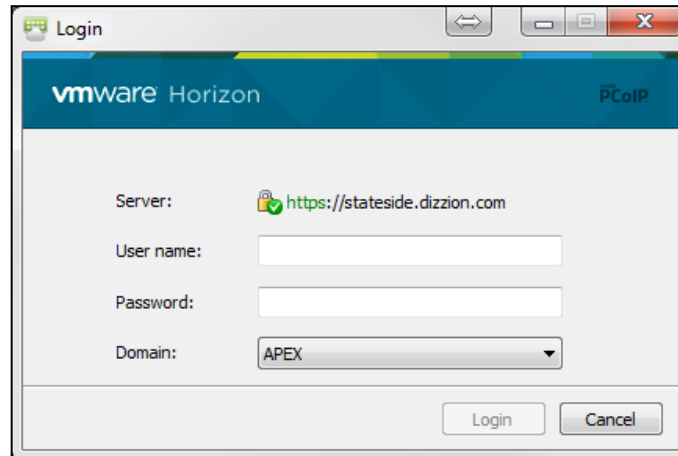
- After the installation, find the VMware Horizon Application on the local desktop. Click on the icon to open the program.
- Double click the + New Server icon at the top:



- Type in the assigned username and password that was sent to your email. ([Click here for example of email](#))
- Be sure to select "APEX" as your domain. When logged in, double click on "10102-vDesktops" which is outlined in blue.

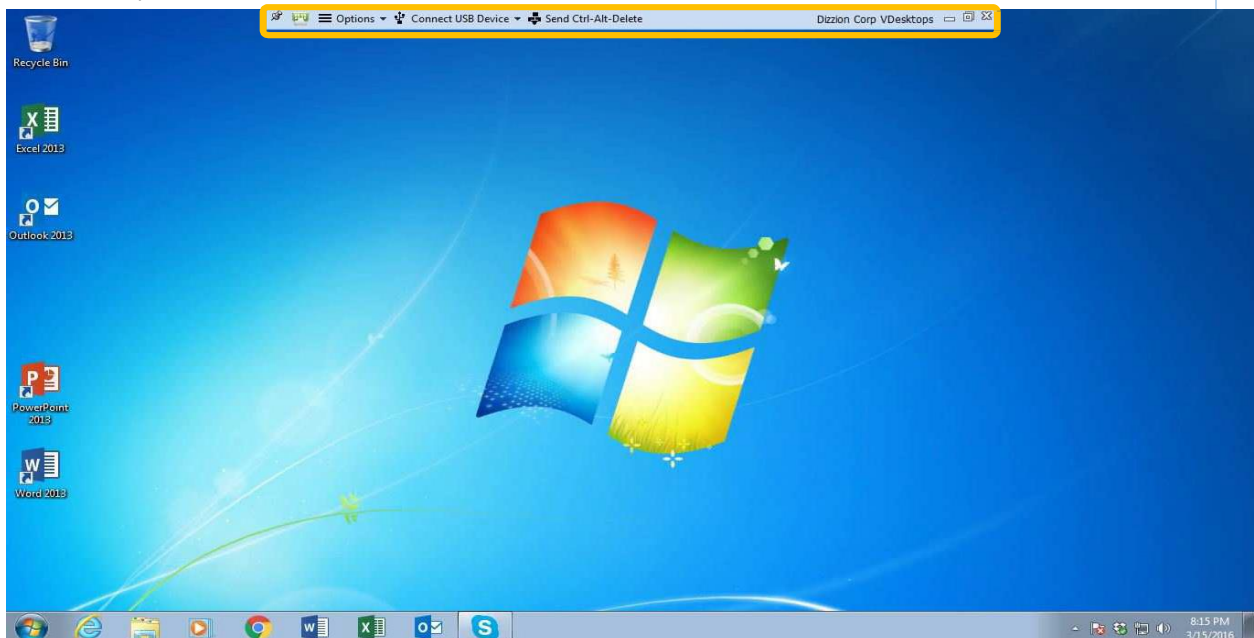


- The Login page appears:



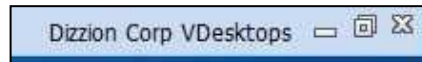
Important Information

- The VMware Horizon Desktop opens up a session showing a typical Windows 7 desktop.
- VMware desktop and your local machine are two different environments, what's done in one does not affect the other.
- A Windows Desktop with any applications that have been provisioned onto the VMware Horizon Desktop.
- A toolbar on the top of the desktop. This toolbar supplies some additional to control the desktop.

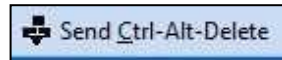


- Customer Care Specialists cannot copy and paste information from a personal desktop into the VMware.
- Open Spark, the Stateside Portal and Rackspace from the VMware Horizon Desktop.

- The top right corner contains the standard exit “X”, window , and minimize “—” buttons.



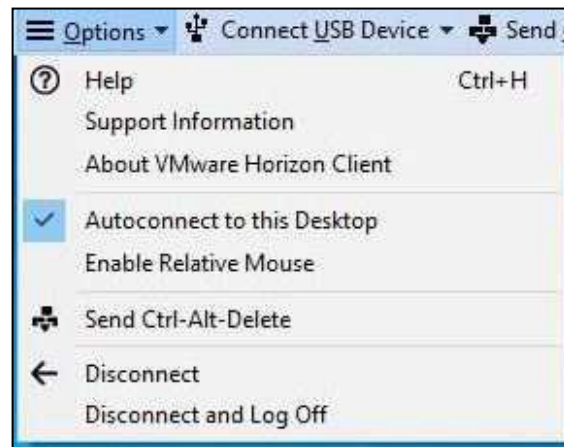
- Click Send Ctrl+Alt+Delete to open a screen to log off VMware, change the desktop password or start VMware Task Manager.




- If USB redirection is enabled on VMware, the “Connect USB Device” menu can be used to apply preferences and options to USB device connections.



- The Options menu offer more in depth information on the VMware Horizon application, as well as gives the ability to disconnect or log-off VMware.



- The  is on the very left of the toolbar when in full screen mode. This can be clicked so that you cannot minimize or window the desktop on accident.

Exiting VMware

There are two ways to log off VMware. They are:

1. Disconnecting (by disconnecting only, any applications running on the desktop will continue to run after you have exited):
 - Can be done by clicking the “X” in the top right corner of the toolbar, or by going to the options menu in the toolbar and clicking “Disconnect”.
2. Shutting down (all applications will be closed and the virtual desktop will shut down until you log in again):
 - Can be done through the Windows Start menu (bottom left corner of desktop) and selecting “Shut Down”, or by going to the options menu in the toolbar and clicking “Disconnect and Log Off”.

Example of the Email from VIVINT showing credentials:

Welcome to Vivint.SmartHome!

A request for a (temporary, contingent worker, limited access, or non-employee) network and system profile has been made on your behalf. Below you will find your Vivint.SmartHome network login credentials. These credentials are specific to you and should not be shared with others. Your Vivint point of contact will provide you additional information on how you will use your credentials to perform your business tasks and will provide you links to login sites to access the company systems required for your work/projects.

1. User Name:
2. Password:

If you have any questions please reach out to your Vivint.SmartHome point of contact. If you need additional technical assistance, you may email the IT Service Desk at help.vivint.com, or you may call during business hours, Monday-Friday 6:00am-10:30pm (MST) at 801-655-4357.

At the conclusion of your project and/or need for system access, please notify Vivint at *HR@vivint.com when your profile credentials can be disabled. Periodic audits are conducted to review system access and non-active profiles may be disabled at any time.

We appreciate your partnership with Vivint.SmartHome!

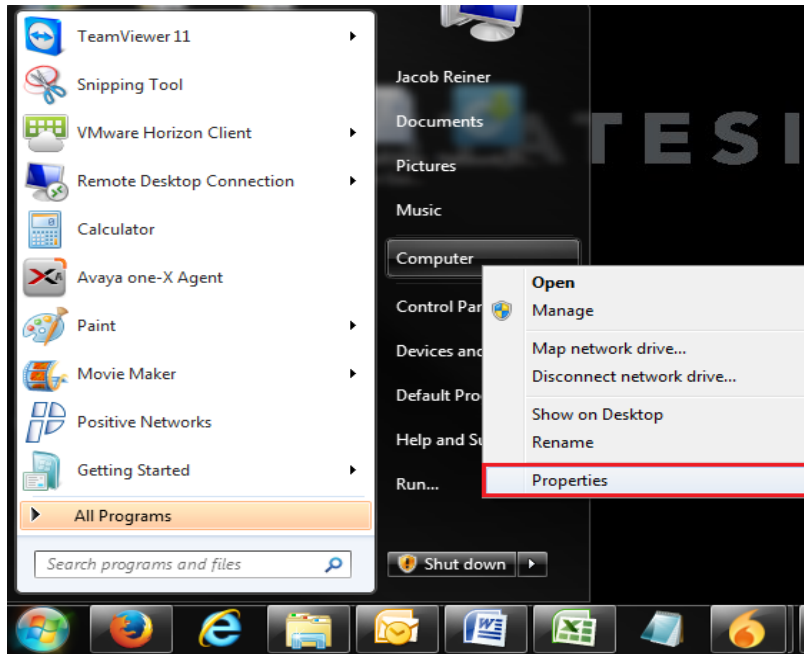


Choosing The Correct VMware Horizon Client

Windows 7 Users:



- Click your “Start” button.
- Right click on “Computer” and click “Properties”



- On the system screen, next to “System type” you will find whether you have 32 or 64-bit operating system.

View basic information about your computer


Windows edition

Windows 7 Professional
 Copyright © 2009 Microsoft Corporation. All rights reserved.
 Service Pack 1
[Get more features with a new edition of Windows 7](#)



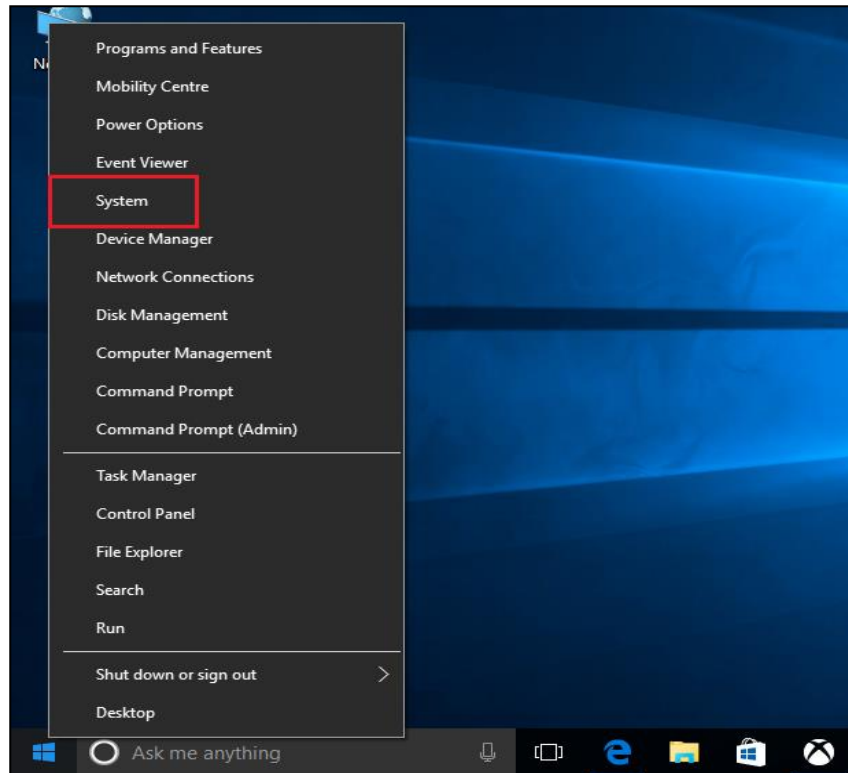
System

Manufacturer:	Dell
Rating:	4.8 Windows Experience Index
Processor:	Intel(R) Core(TM) i3-4005U CPU @ 1.70GHz 1.70 GHz
Installed memory (RAM):	4.00 GB
System type:	64-bit Operating System
Pen and Touch:	No Pen or Touch Input is available for this Display

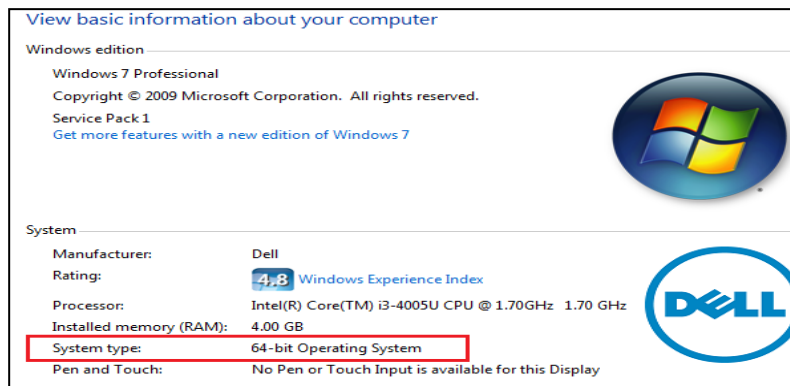


Windows 8.1, and 10 users:

- Right click your “Start” button.
- Click “System”



- On the system screen, next to “System type” you will find whether you have 32 or 64-bit operating system.



[Click here to return back to step 1](#)

Key Learnings

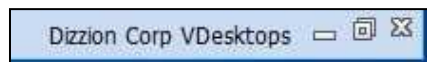
VMware is a virtual desktop used to access Vivint systems. After installing VMware log into the system using credentials sent by Vivint. At the end of the shift, always log off VMware.

Review

1. What is the server name?
2. What is the domain name?
3. Choose the correct desktop below?



4. Circle the button used to minimize VM ware.



5. What are the steps to log off VMware?

Spark

Overview

The instant messaging tool that StatesideBPO uses as an alternative means for communication.

Objectives

This module consists of the following topics:

- Installing the program
- Logging in and out procedures
- Modifying profile information
- Accessing the group support room to communicate with Management

Training Length

30 minutes

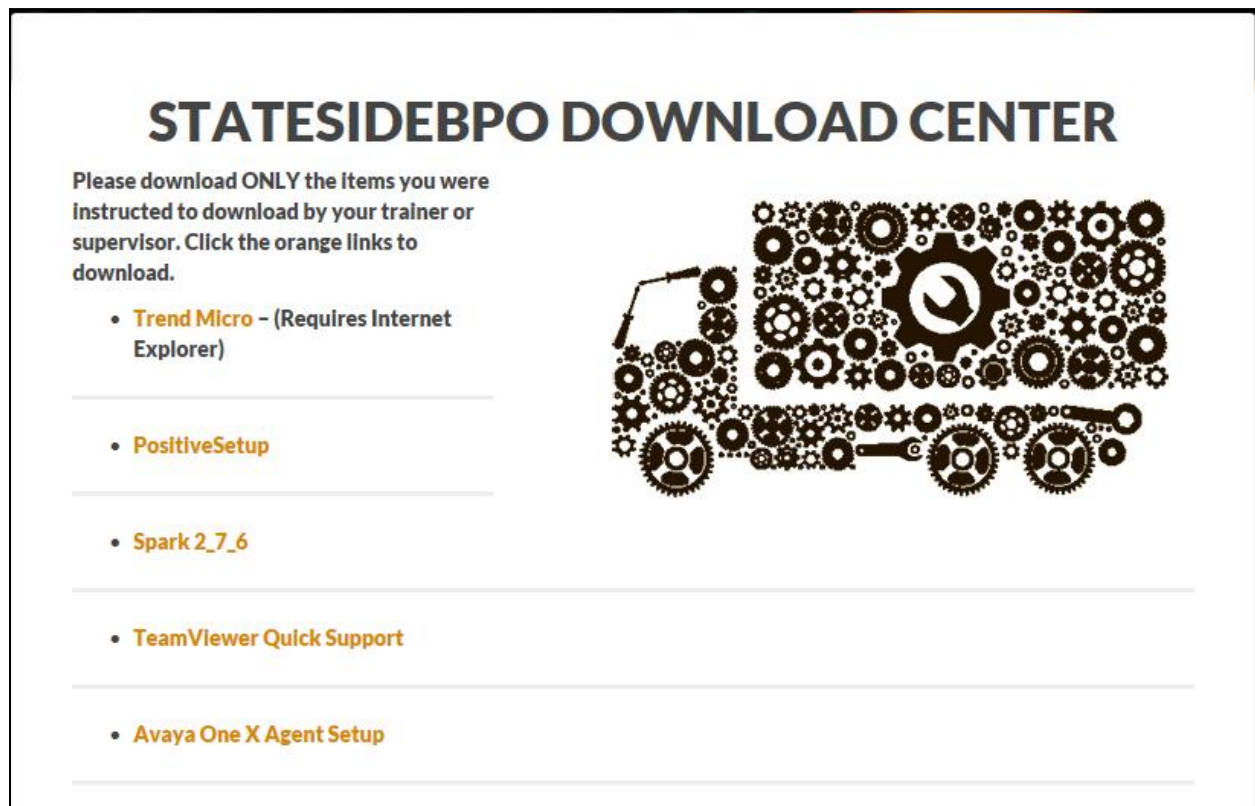


Introduction

Spark is a Java-based instant messaging tool that includes many of the features included in today's messengers, such as file transfers, group chat and voice calling. StatesideBPO uses the instant messaging feature to communicate real-time with members within the company's various departments.

Downloading Spark

Log into the **Stateside Portal** and click **Downloads**. The following page appears:



STATESIDEBPO DOWNLOAD CENTER

Please download **ONLY** the items you were instructed to download by your trainer or supervisor. Click the orange links to download.

- [Trend Micro - \(Requires Internet Explorer\)](#)
- [PositiveSetup](#)
- [Spark 2_7_6](#)
- [TeamViewer Quick Support](#)
- [Avaya One X Agent Setup](#)

Click **Spark 2_7_6** and a download file appears at the bottom of the browser. Double-click to open and begin the installation process. Upon completion, launch the application.

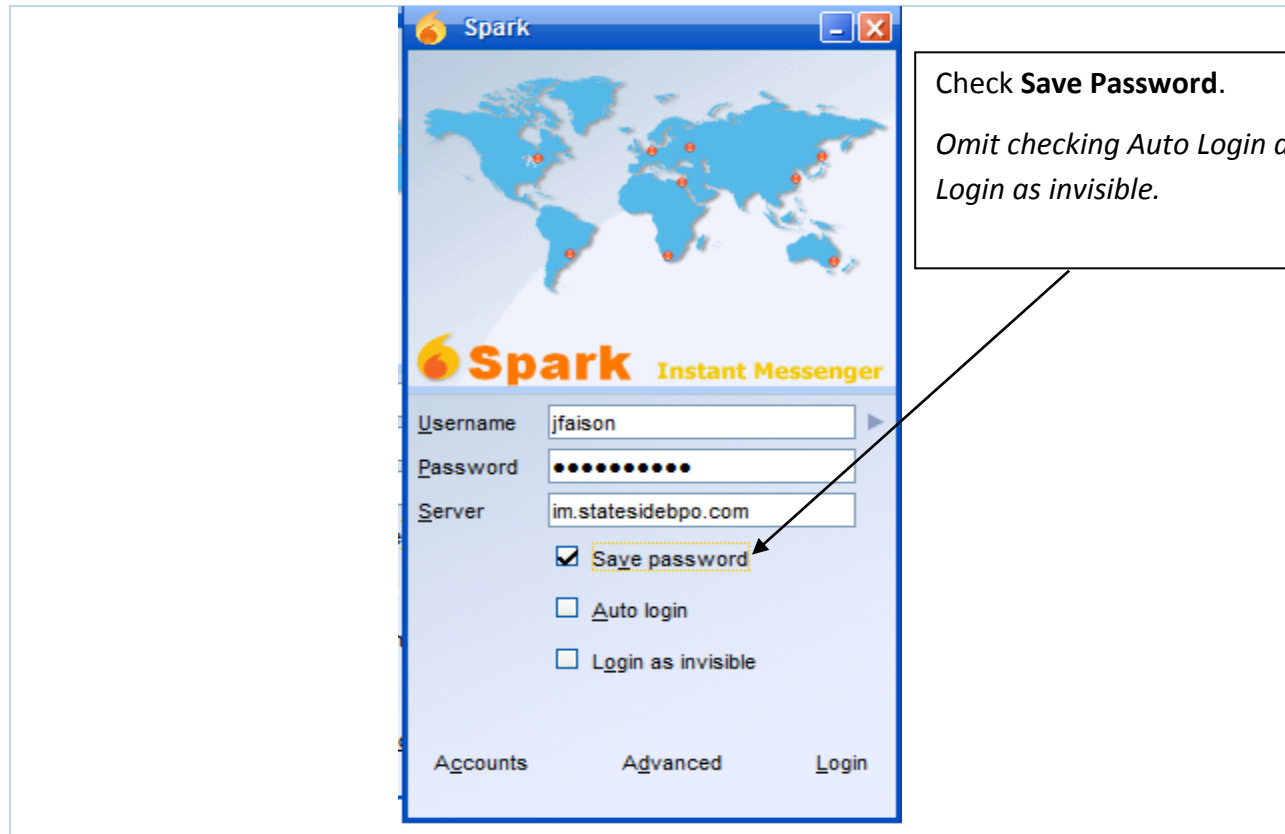
Logging into Spark

Upon launching the application, the login screen displays:



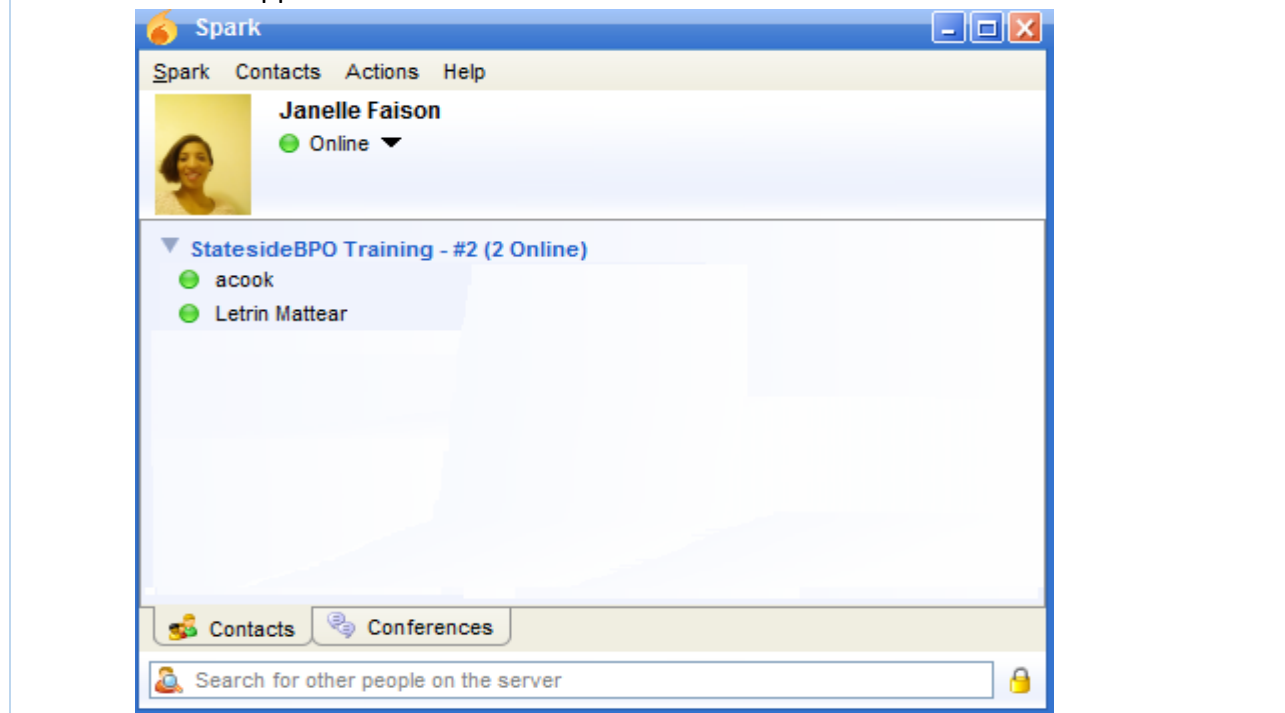
- **Username:** Usually first initial and last name (i.e. rsmith)
- **Password:** Same as Rackspace
- **Server:** im.statesidebpo.com

See the example below:

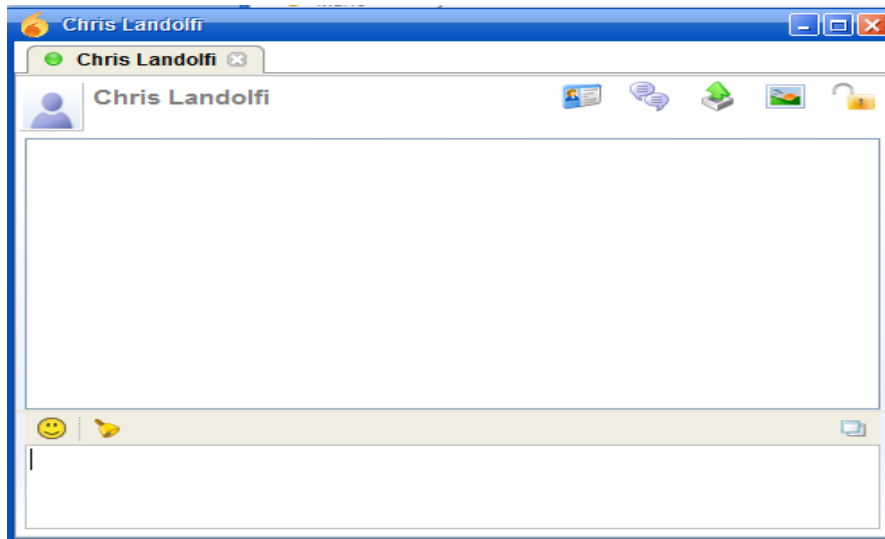


Starting A Conversation

The main screen appears:



Upon logging into Spark, the applicable group appears. All employees are placed into a group based on the needs of the position. Customer Service Specialists are placed into a Training group and/or their specific account group. All the individuals from the training class or on the account are in the same group. Double click the contact name to begin a chat conversation. This is usually a Supervisor or another Support member (i.e. Human Resources, Trainer, etc.). An empty box appears:

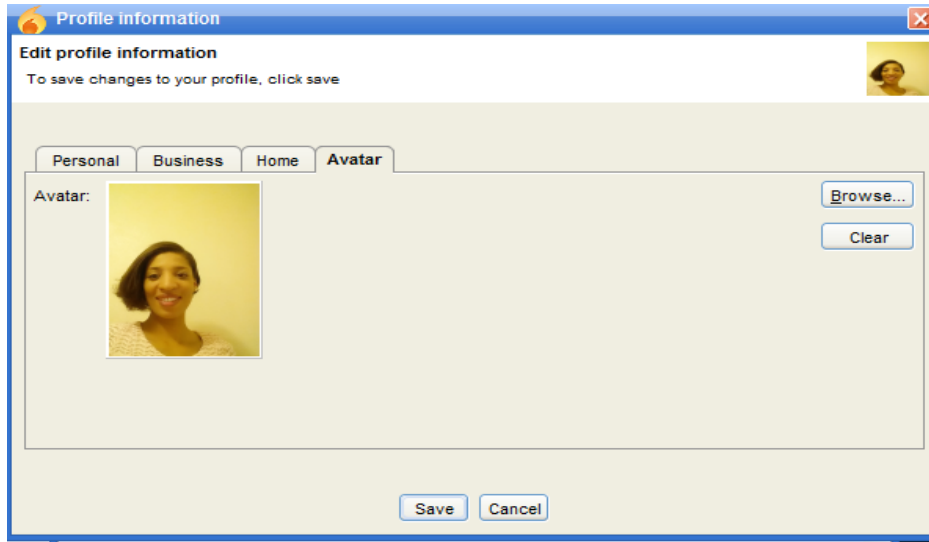


Type a message in the lower portion of the screen and press **Enter**.

Profile Update

Select **File** and **Edit My Profile** to present the screen below:

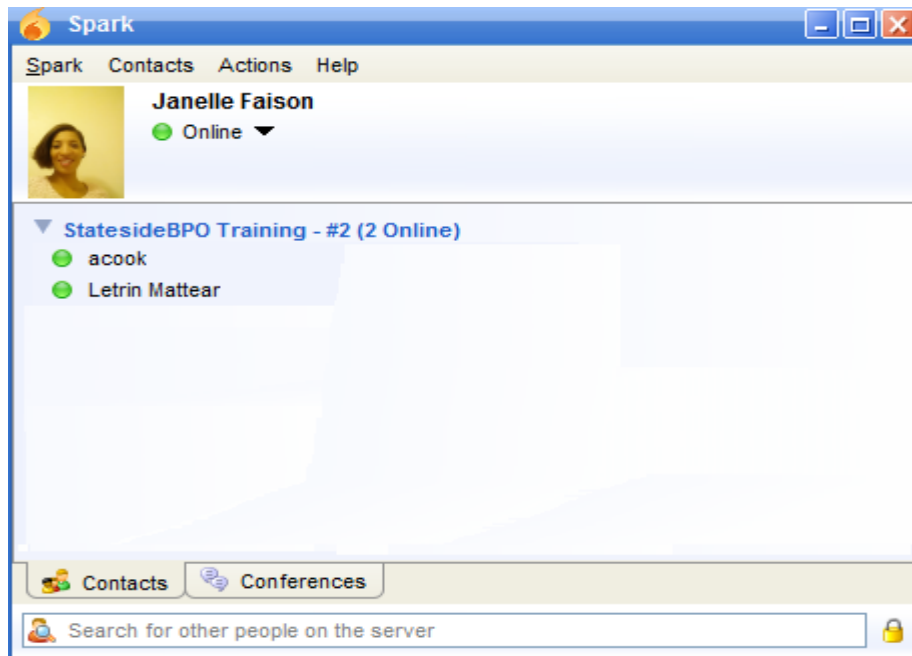
Ensure that the **First name** and **Last name** fields are completed. If not, click in the field and input your full name. Click the **Avatar** tab to upload a photo. Select **Browse** and choose an appropriate profile picture. Then click open and the picture displays as shown below:



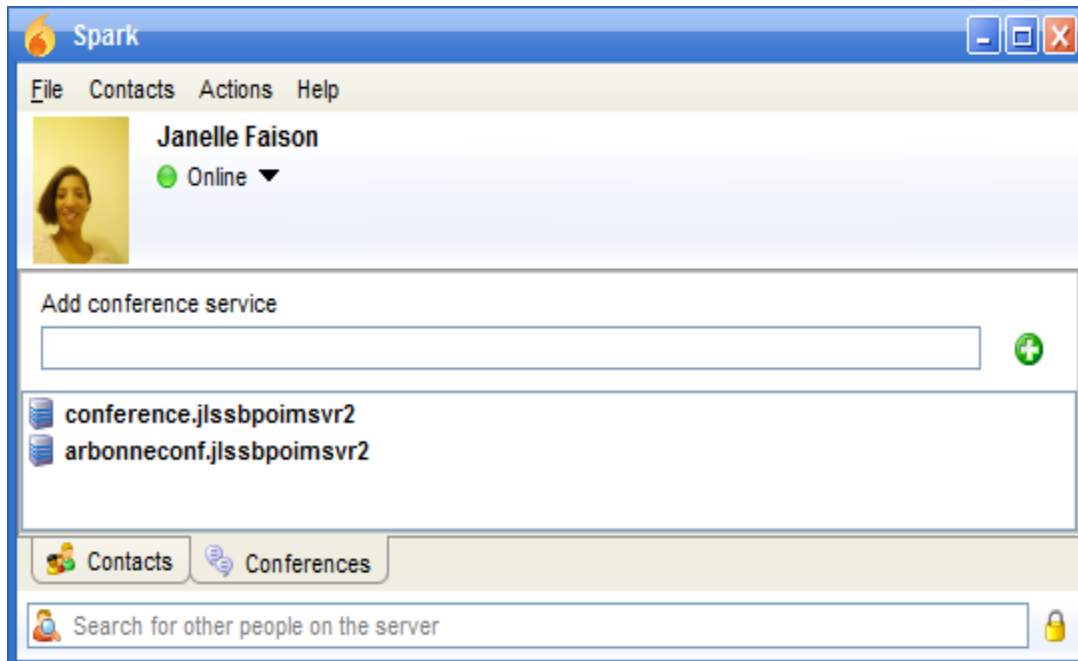
Click **Save** and the profile picture displays in the upper right corner.

Group Chat Rooms

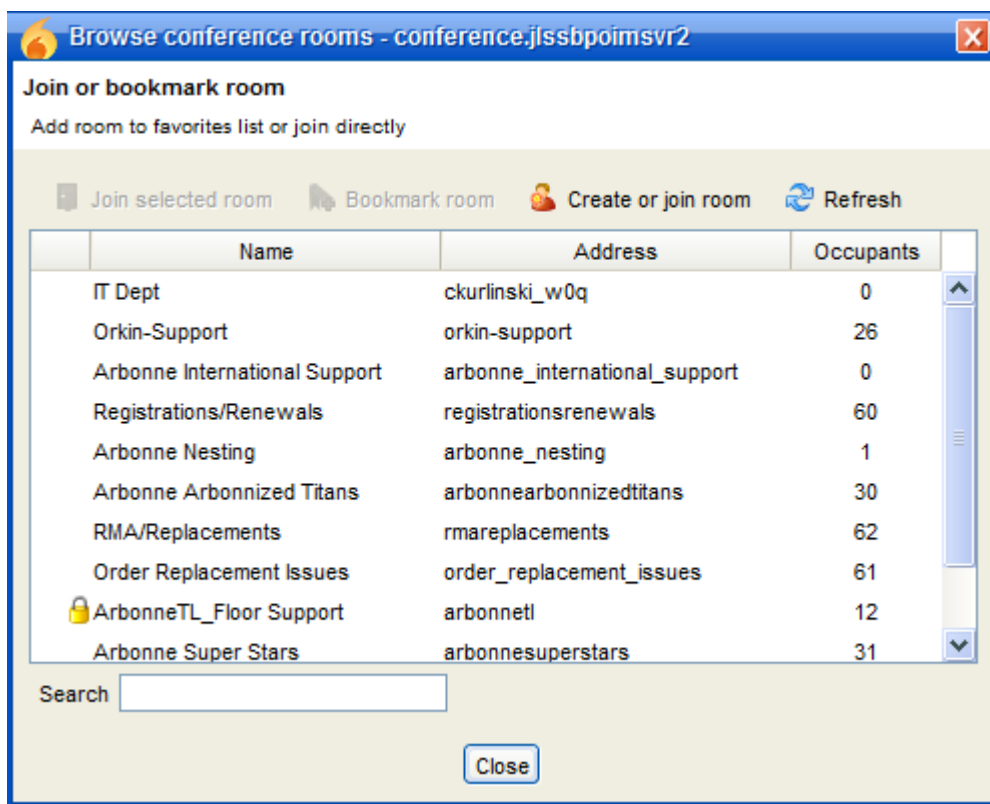
The team uses a group support for general questions and assistance throughout the day. To access the group chat, locate the tabs at the bottom:



Click **Conferences** and the following choices display:



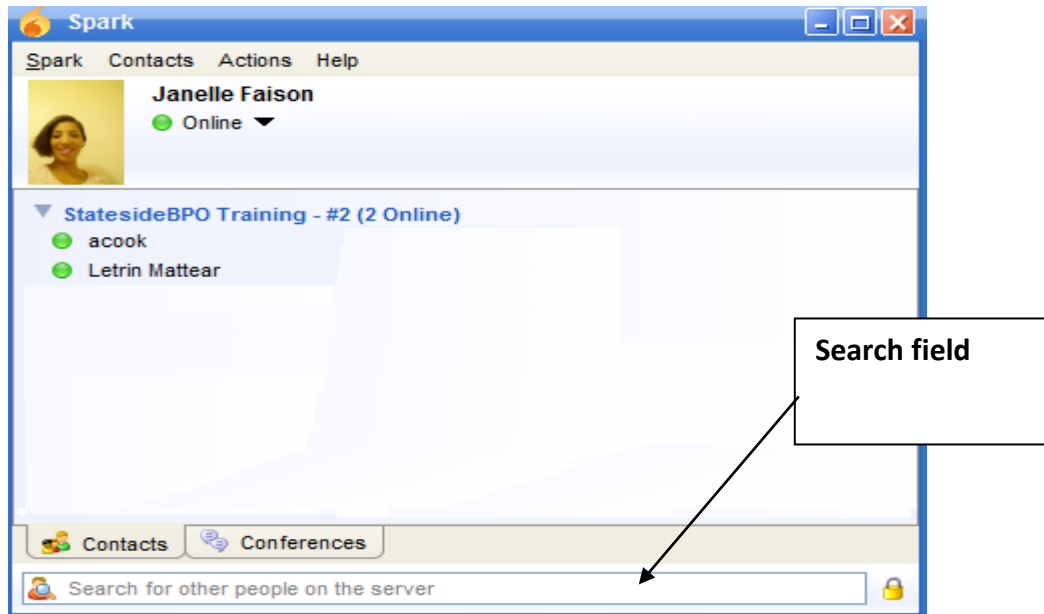
Select **conference.jlssbpoimsvr2** to present the options below:



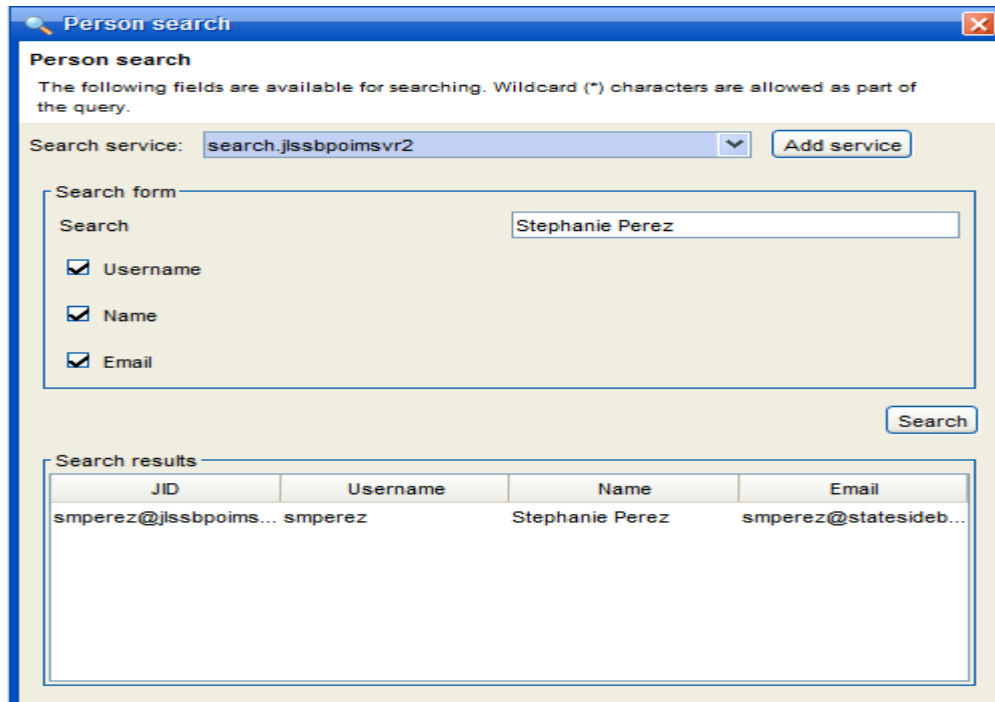
Choose the Vivint specific group chat. The group chat room appears.

Searching For A Specific Person

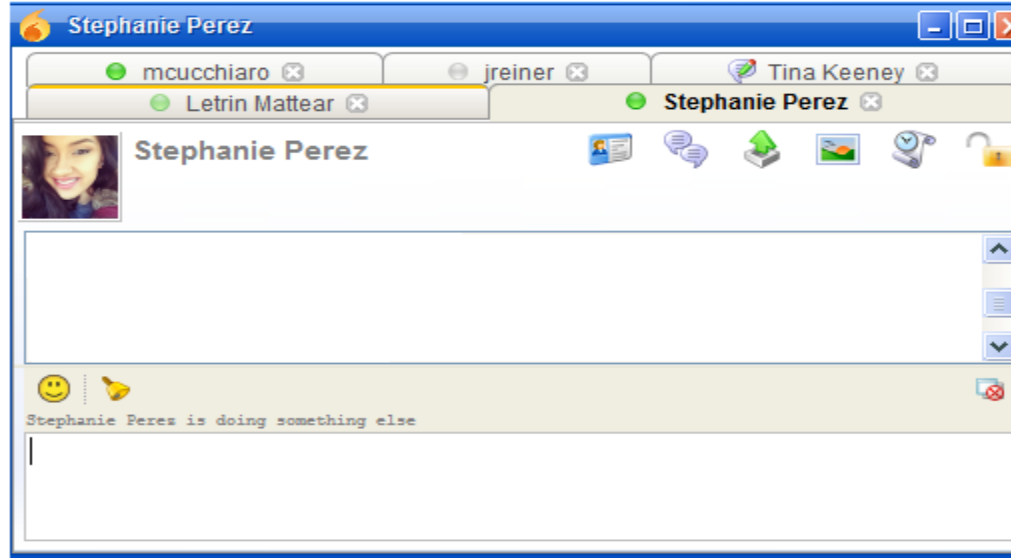
To search for a user (not listed in your contacts), click in the Search field at the bottom of Spark:



Search by entering the person's full name, email address or Spark ID.



Double click on the person's name under the **Search results** and an open conversation box appears.



Key Learnings

StatesideBPO uses the instant messaging feature to communicate real-time with members within the company's various departments. Use this tool upon requiring an immediate response from a Supervisor. Spark must list your full name but uploading a profile picture is optional.

Review

1. Why does StatesideBPO use Spark?
2. What is the Server name?
3. Outline the steps to reach a Supervisor using Spark.
4. Why would a Customer Service Specialist change their name in Spark?
5. List the steps to locate the Vivint group chat rooms?

Salesforce Introduction

Overview

This is a basic introduction in the main Vivint system called Salesforce.

Objectives

This module consists of the following topics:

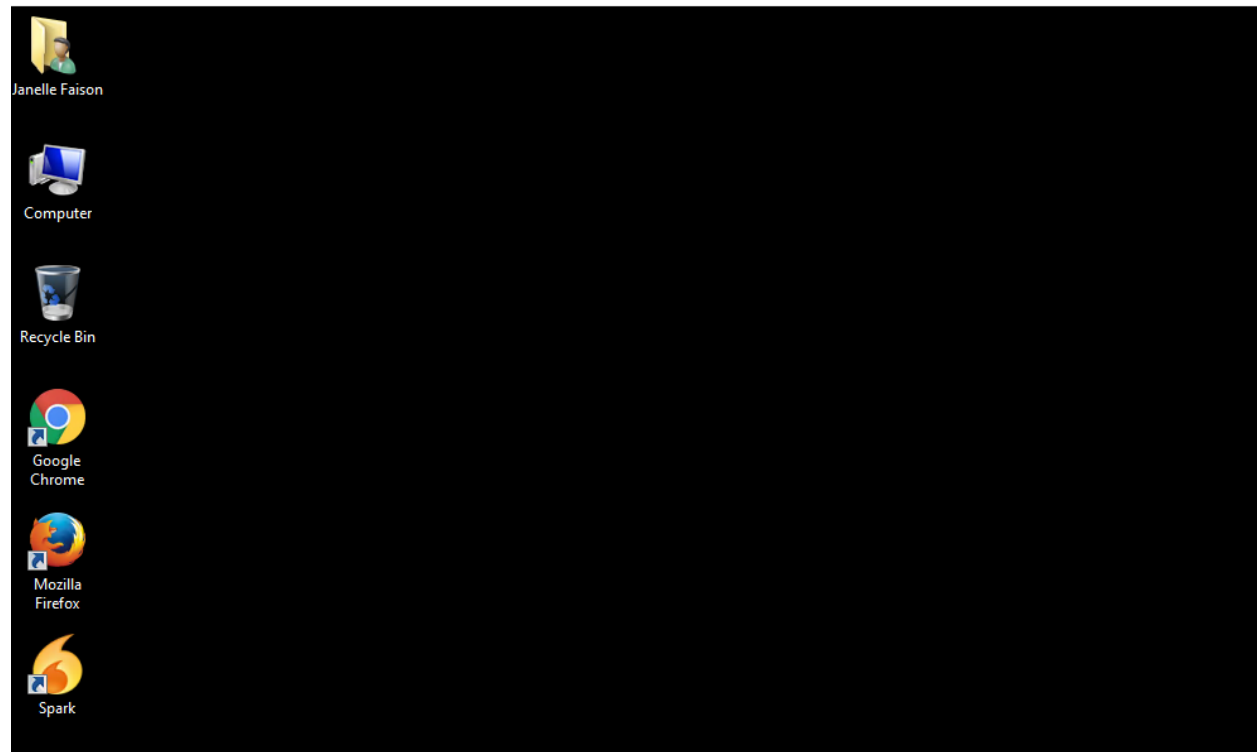
- Define and log into Salesforce
- Identify the correct browser to use
- Utilize the best search techniques to locate the customer's account

Training Length

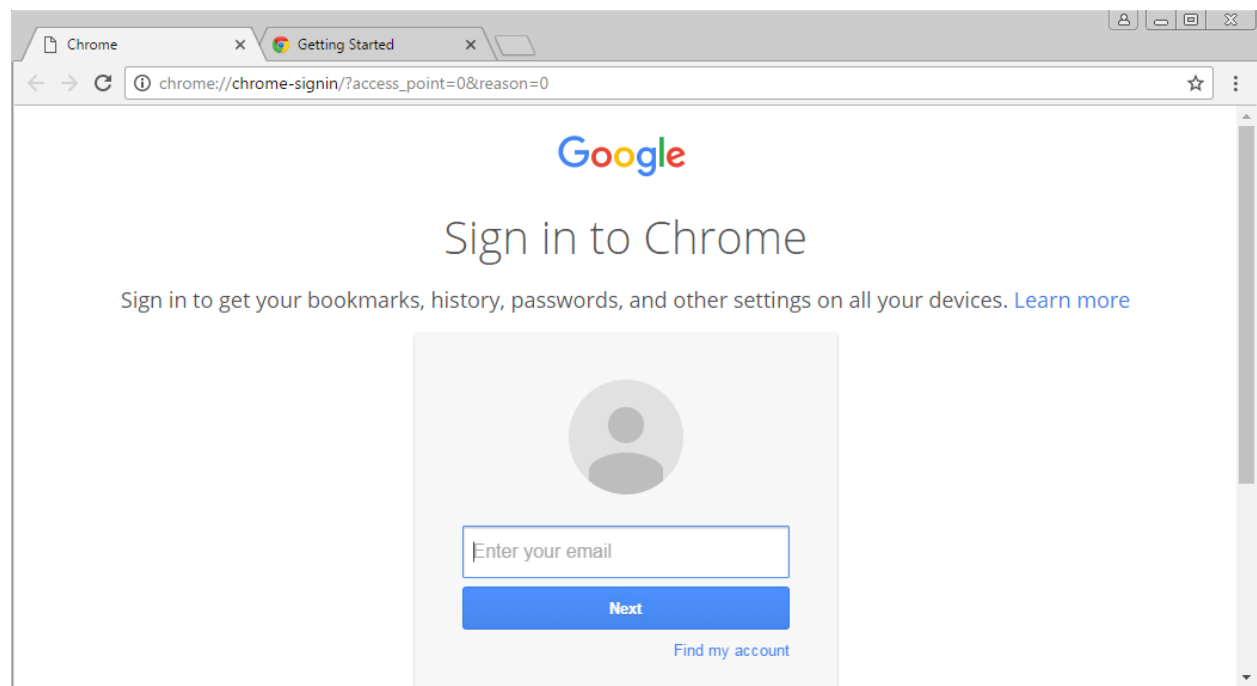
20 minutes

Introduction

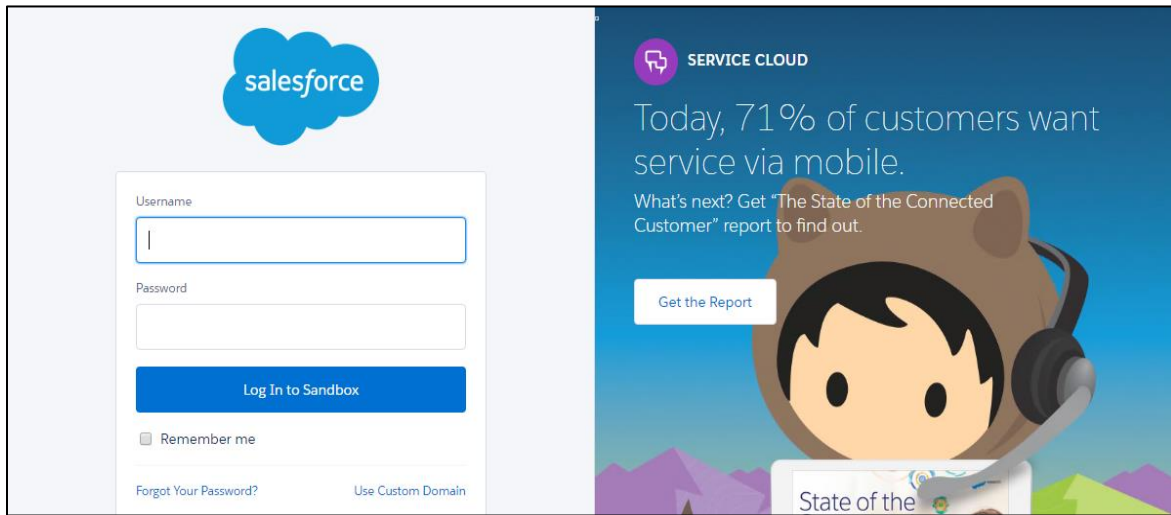
Salesforce is the main system used to research a customer's account, make changes and answer billing questions. Upon logging into VMware, the following appears:



Double click the **Google Chrome** icon. Only use Google Chrome to access Salesforce.



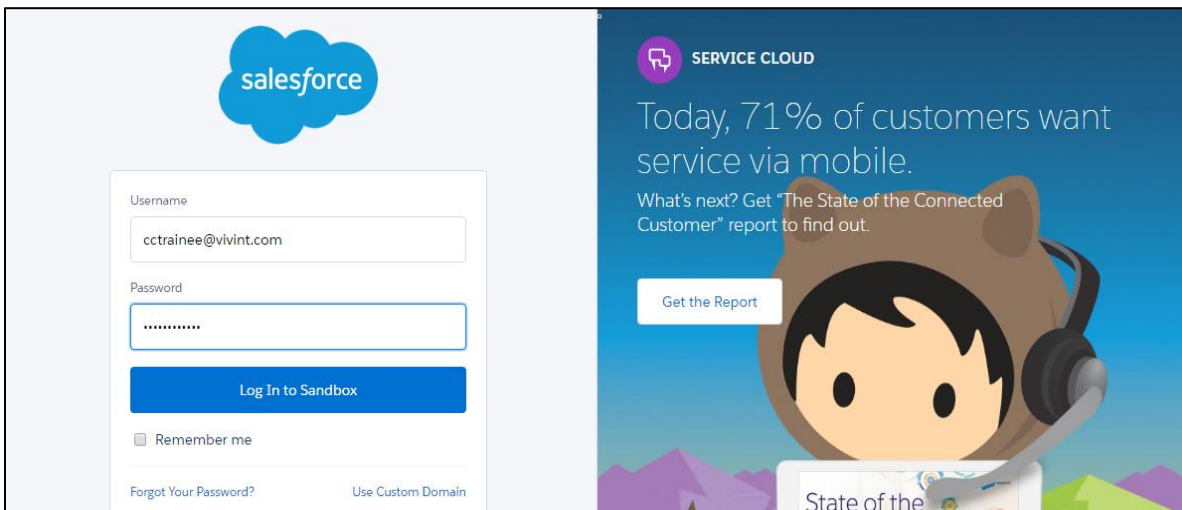
Type test.salesforce.com in the address bar. The Salesforce log in page appears:



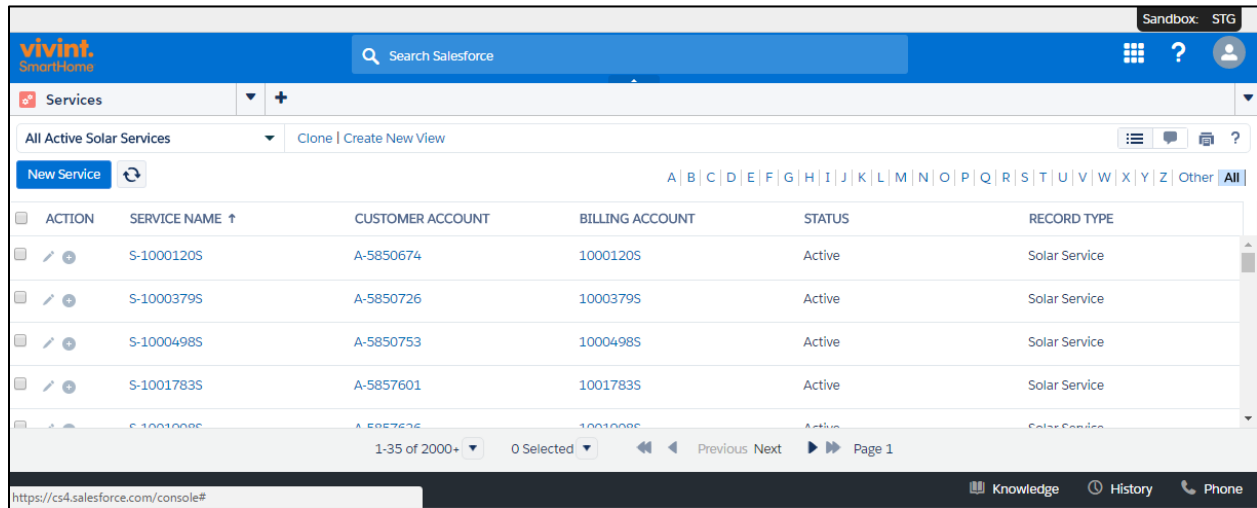
Input the test credentials as follows:

- Username: cctrainee@vivint.com
- Password: Training2016

Double check that the number lock on before typing the password. The number lock button on the keyboard is often turned off when logging into VMware. Since all trainees/trainers use the same credentials, it is imperative that everyone carefully input credentials. Entering incorrect credentials multiple times locks the system preventing access. It takes approximately 30 minutes for the system to unlock and then additional trainees may make another attempt to log into Salesforce.



Click **Log In to Sandbox** after entering the credentials. This presents the following screen:



The search bar at the top of the screen permits using various pieces of information to locate any data in Salesforce. Let's begin by outlining the proper steps to locate a customer's account. Below are the pieces of information to use to locate the customer's account (in order):

- **Primary Telephone Number:** The 10-digit telephone number associated with the customer's account. When this number does not display the account, ask if there could be another telephone number associated with the account.
- **Email Address:** If the primary or alternate number do not populate the account, ask for the email associated with the account.
- **Address:** If the primary, alternate or email address do not populate the account, ask for the address. **Do not input the full address. Only input the street number and name. Omit the parts of the address such as Street, Avenue, Lane after the street name plus the City, State and zip code.** Confirm the spelling of the street name for accuracy.
- **Contract Signer's Name:** As a last resort, use the contract signer's name to locate the account. Confirm with the caller the proper spelling of their name. This applies even when they have a common name. *Take for example – Kimberly could be spelled in a number of different ways. It can be spelled as Kimberlee, Kimberley, Kimberleigh, etc. Never assume the spelling.*

Searching by phone number

Input the telephone number in the search field at the top of Salesforce. There is no need to input parenthesis or dashes. See the example below:



Press **Enter** and the system looks for any records/accounts that match the previously entered information. In this example, it found a number of records that match the telephone number:

Cases (1) [Show Filters](#)

Action	Case Number	Case Record Type	Subject	Status	Date/Time Opened
Edit	CA-11343421	Troubleshooting	Lamp Module Recall	Auto Closed	4/30/2016 8:40 AM

Contacts (2) [Show Filters](#)

Action	Name	Mobile	Home Phone	Email	Birthdate	Gender	Mailing Address 1	Mailing Address City	Mailing Address State	Mailing Zip Code
Edit	Linda Johnson				6/28/1954		2376 Salt Works Rd	Palestine	TX	75803-3954
Edit	James Johnson			1954lindajohnson@gmail.com	6/9/1949		2376 ACR 2202 Salt Works Rd	Palestine	TX	75803-3954

Phone Numbers (1) [Show Filters](#)

Action	Name	Phone Number
Edit	James Johnson - Home (Primary)	(903) 723-5979

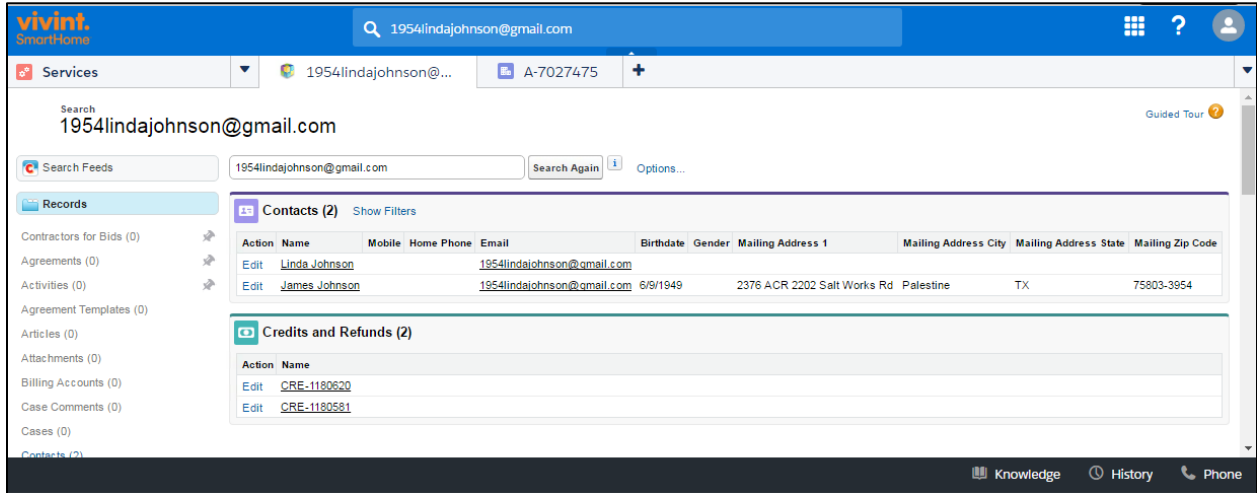
Services (1) [Show Filters](#)

Action	Service Name	Customer Account	Record Type	Status	Service Address 1	Service City	Service State	CMS AR Number	Purchased By	Phone Number Search
Edit	S-3979053	A-7027475	Security Service	Active	2376 Salt Works Rd	Palestine	TX		Vivint	

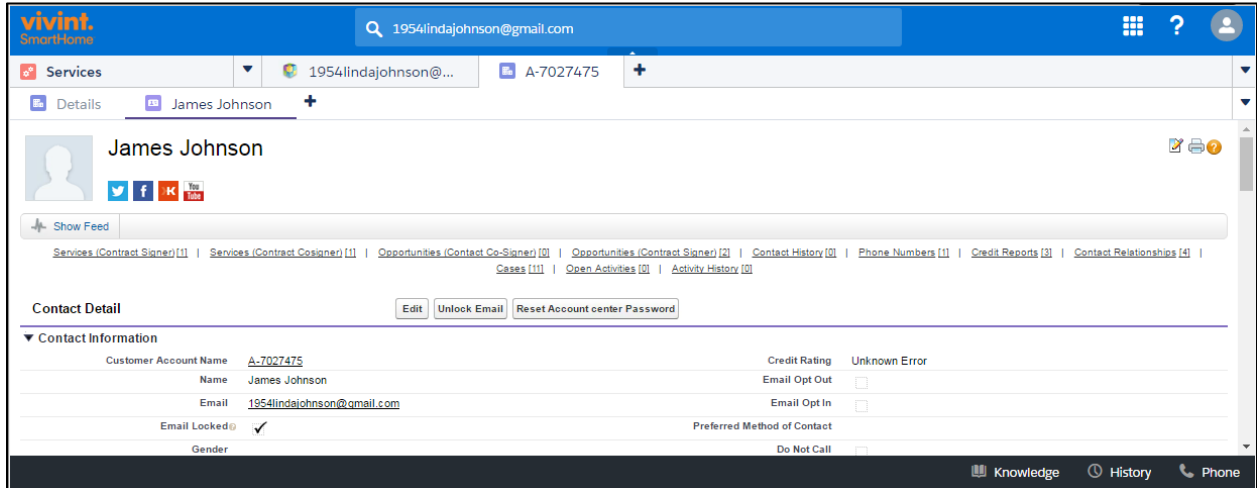
Look for the red background with a gear called **Services**. Review the Record Type to ensure the service displays **Security Service**. In this example, the service name is S-397053. Click the service number to populate the customer’s account. The following screen appears:

Searching By Email Address

Input the customer's email address and press **Enter**. Occasionally, the services may not appear. In this case, select the customer's name:



The Contact Details page appears:



Click the hyperlink **Services (Contract Signer)** to display the service number. The Service number appears. Copy and paste the service number in the search field.

Searching By Service Address

When using the address to locate the account, ask the customer for their service address (not billing address). Input the street number and street name. Omit everything else for best results such as Road, Street, Drive, Avenue and the City, State and Zip code. Scroll down to the **Services** and click the **Service name**:

The screenshot shows the Vivint SmartHome interface with a search bar containing '2376 Salt Works'. The left sidebar lists various categories like Services, Office Assignments, Opportunities, etc. The main content area displays several sections:

- Customer Accounts (1)**: A table with columns for Action, Customer Account Name, Record Type, Primary Contact, Secondary Contact, Primary Phone, Secondary Phone, CMS AR Number, and Sales Credit. One row is visible for account A-7027475.
- Opportunities (2)**: A table with columns for Action, Opportunity Name, Record Type, Customer Account Name, Stage, Sales Credit, and Contract Term. Two rows are visible for opportunities Q-5637426 and Q-5638011.
- Services (1)**: A table with columns for Action, Service Name, Customer Account, Record Type, Status, Service Address 1, Service City, Service State, CMS AR Number, Purchased By, and Phone Number Search. One row is visible for service S-3979053.
- Work Orders (1)**: A table with columns for Action, Work Order Id, Status, Status, and Created By. One row is visible.

Searching By Contract Signer Name

When searching by the contract signer's name, input the full name and press **Enter**.

The screenshot shows the Vivint SmartHome interface with a search bar containing 'james johnson'. The left sidebar is visible. The main content area displays several sections:

- Services (25+)**: A table with columns for Action, Service Name, Customer Account, Record Type, Status, Service Address 1, Service City, Service State, CMS AR Number, Purchased By, and Phone Number Search. Five rows are visible for various services.
- Sold Accounts (25+)**: A table with columns for Customer, CMS AR Number, Date Sold, and Sold To. One row is visible for customer James Johnson.

Scroll down and locate the Services section. Since more than one account populated, verify the address to ensure that the correct account is accessed. If the first few accounts do not match, click **Show More** to see additional accounts:

Action	Service Name	Customer Account	Record Type	Status	Service Address 1	Service City	Service State	CMS AR Number	Purchased By	Phone Number Search
Edit	S-3979053	A-7027475	Security Service	Active	2376 Salt Works Rd	Palestine	TX		Vivint	
Edit	S-3756628	A-8534420	Security Service	Customer Moved	1410 W Walnut St	Danville	KY		Vivint	
Edit	S-3591392S	A-5359175	Solar Service	Active	127 Teal Ln	Mount Laurel	NJ	3591392S	Hannah	
Edit	S-3848667	A-6741398	Security Service	Active	506 CONANT ST	HILLSIDE	NJ		Vivint	
Edit	S-4968803	A-9031534	Security Service						Vivint	
Edit	S-5118858	A-9300681	Security Service						Vivint	
Edit	S-5107533	A-9280689	Security Service	Never Installed	600 GREENLEAF DR	ANDERSON	SC		Vivint	
Edit	S-5092812	A-9253862	Security Service						Vivint	
Edit	S-5203061	A-9449717	Security Service						Vivint	
Edit	S-5105477	A-9142730	Security Service						Vivint	
Edit	S-4979390	A-9050570	Security Service						Vivint	
Edit	S-5183167	A-9415085	Security Service	Active	35 WHEATLAND WAY	FORT MITCHELL	AL		Vivint	
Edit	S-4581340	A-8360016	Space Monkey Service	Active	824 TAYLOR AVE	EVANSVILLE	IN		Vivint	
Edit	S-5138422	A-9335504	Security Service	Active	242 RILEY WAY	ELIZABETHTOWN	KY		Vivint	

Click the **Service Name** to populate the account. Now the customer account opens, let's explain the top portion of the customer's account:

Service Information

Service Number: 3979053
Service Type : Security Service
Account Type : Residential
Panel Type: SkyControl
Original Sales Office: Texas East 2014
Installation Date: 08/30/2014


- **Service Information:** Provides the service number that is associated with the type of service the customer has. Keep in mind that a customer could have multiple services such as Security, Space Monkey and Wireless Internet. Each service would have a different service number. This information identifies if the account is residential or commercial, the panel type (i.e. Go!Control, Sky Control, Apex, Honeywell, etc.), Sales Office (i.e. NIS, Sales Referral) and the date the equipment was

installed. Honeywell and Apex control panels are handled by Tier 3 Customer Care Specialists.

- **Account Status:** This indicates if the customer's account is in good standing or not such as their payment is overdue or their account is on time or their services are cancelled. Account status could display as:
 - **Active** – The customer is paying on time.
 - **Red X** – The customer's account has been cancelled.
 - **Yellow Check** – Pending Payment.

Account Status

[A-7027475](#)
Billing Status

 On Time
Service Status
 Active

Customer Account

Contract Signer
James Johnson
1954lindajohnson@gmail.com (903) 723-5979

Contract CoSigner
James Johnson
1954lindajohnson@gmail.com (903) 723-5979

- **Customer Account:** This is the customer’s basic information such as the contract signer’s name, co-contract signer’s name, their address, telephone number and email address.

- **Address:** The service address is the location of where the technician installed the equipment. The billing address is the location where Vivint sends the invoice. They could be different. Example – A parent may decide to pay for security service for their child.

Address

Billing Address
James Johnson
123 Gotham St
Gorham New York 84096

Service Address
2376 Salt Works Rd
Palestine TX 75803-3954
Anderson

Passcodes

Package Type: Home Security (SkyControl)
C SID: E3009594
Primary Passcode: sebastian
Secondary Passcode:

- **Passcodes:** This service provides information such as additional packages that the customer may have, the central station identification number, primary and secondary passcode. Passcodes are created by the customer and approved by Account Creations. Should a customer select a passcode that is not HR appropriate, Account Creations asks the customer to select another passcode. The primary passcode allows the caller to change primary account information such as email address, billing address, etc. Someone that provides the secondary passcode does not have the same authority to change information as someone with the primary passcode. Unauthorized party with access to the primary passcode can cause a lot of damage to the customer’s account. Later, we’ll discuss the differences between the primary and secondary passcode.

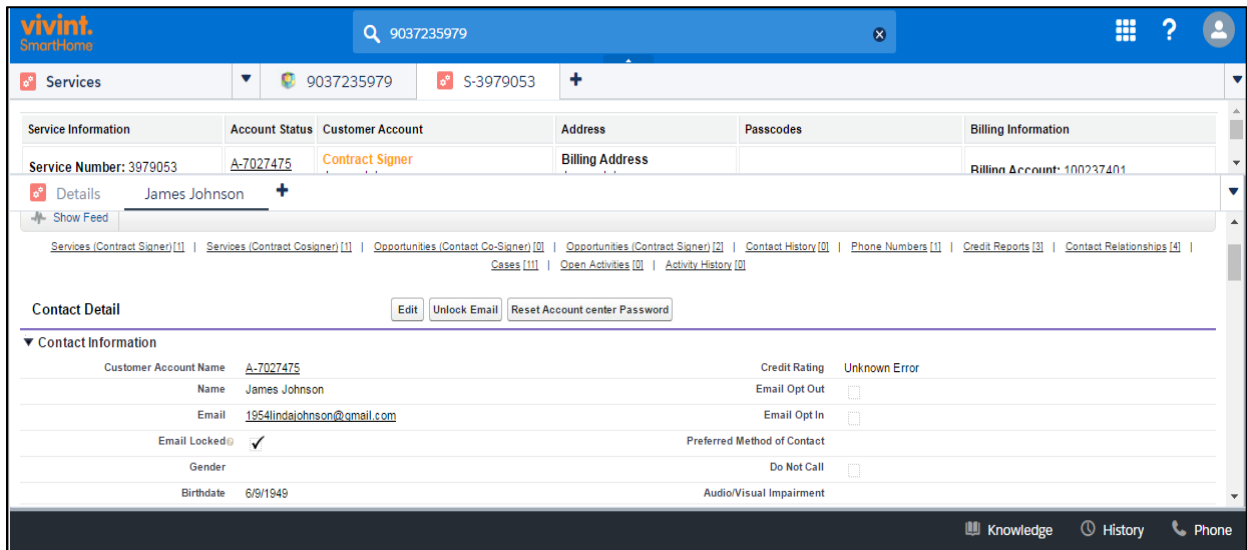
- **Billing Information:** The account number associated with their bill, the date their payment is due, their current Reoccurring Monthly Revenue (RMR), if they are past due the amount they are past due appears under aging and where or not they payment is set up with automatic withdraw or direct invoice.

Billing Information

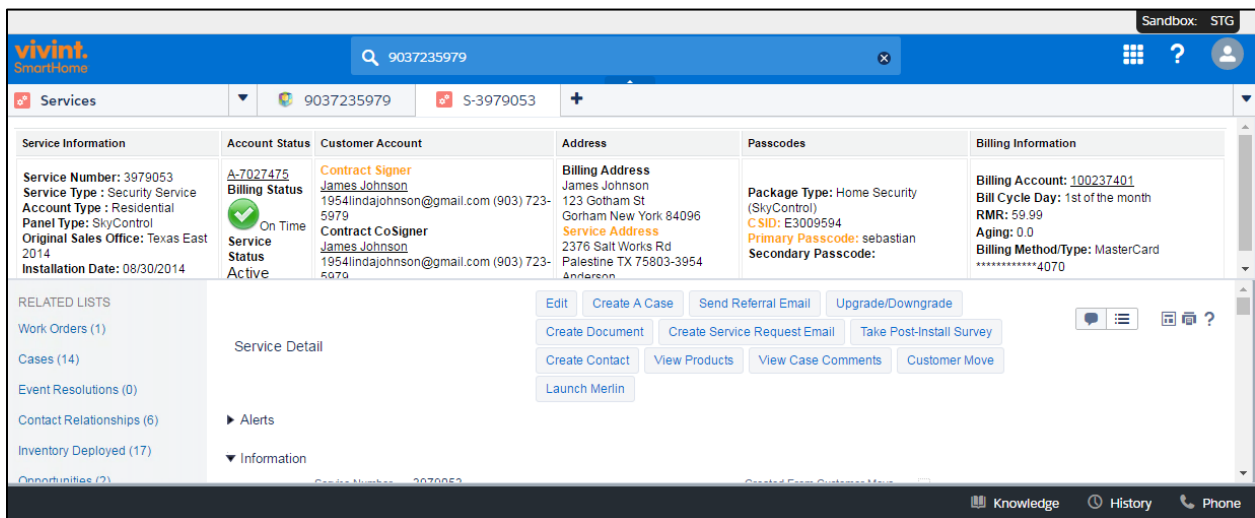
Billing Account: 100237401
Bill Cycle Day: 1st of the month
RMR: 59.99
Aging: 0.0
Billing Method/Type: MasterCard
*****4070

Basic Salesforce Navigation

- **Hyperlinks** – There are hyperlinks through various parts within Salesforce that open up more information about the customer’s account. A hyperlink is present anytime a piece of information is underlined.
 - a. Selecting the Contract Signer’s name opens up the Contact Card. The Contact Card populates as shown below:



- b. Selecting the hyperlinks from the left side are shortcuts populate that particular section. Take for example – To review case comments from previous work orders, select Work Orders from the left side.



The Work Order sections appears:

Work Orders		New Work Order (NO Dispatch)		Work Orders Help ?				
Action	Work Order Id	Status	Technician	Assignment Start	Assignment Finish	Department	Install Office	Created Date
Edit	WO-20140830-2426917	Completed	Tyler Robinson (79232)			zzDo Not Use INV - Texas East 2014		8/30/2014

The work order section displays any open or completed works orders from a Field Service Professional (FSP), which is a technician.

- Toolbar** - The toolbar at the top and the right side may be adjusted by using the white arrow. Hovering the mouse over the middle line forms a double black arrow that maybe used to adjust the size of the right side out bar. The right slide bar displays work orders, previous case from other reps at Vivint, and service attachments. Service attachment display any documents sent to the customer or that the customer has sent to Vivint (i.e. bank statement, contracts, etc.)

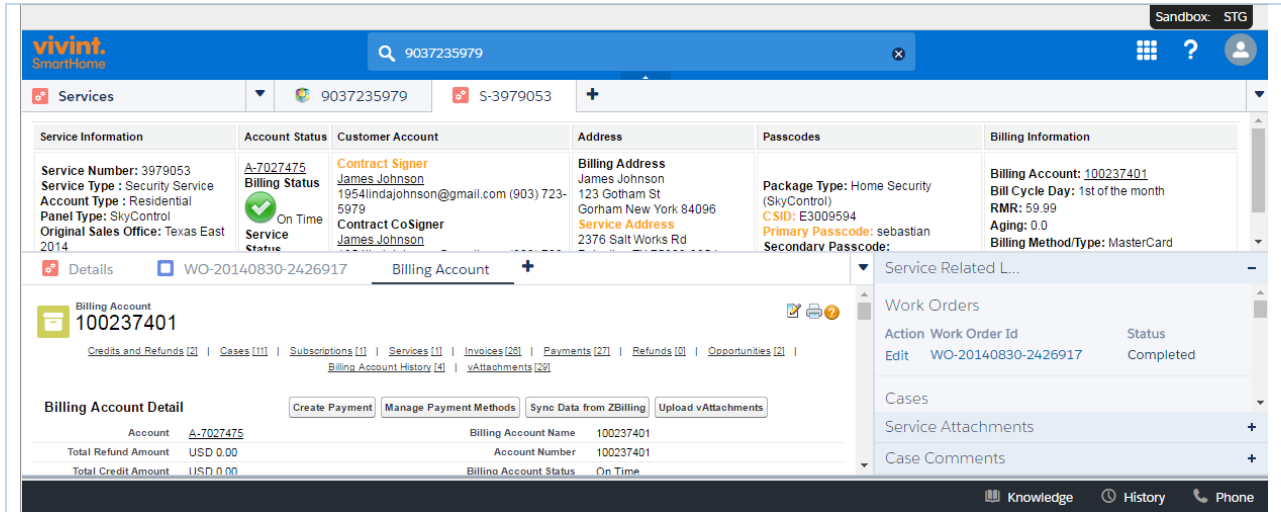
The screenshot shows the Vivint SmartHome interface for a customer account. The main content area displays a table of Contact Relationships:

Action	Contact Name	Contact Type	Relationship Type	Created Date	Created By
Edit Del	James Johnson	Contract Cosigner	Self	8/30/2014	Daniel Steele, 8/30/2014 12:45 PM
Edit Del	James Johnson	Contract Signer		8/30/2014	Daniel Steele, 8/30/2014 12:45 PM
Edit Del	James Johnson	Billing		8/30/2014	Daniel Steele, 8/30/2014 12:45 PM
Edit Del	James Johnson	Emergency	Self	8/30/2014	Heather Budge, 8/30/2014 2:37 PM

The right sidebar contains several sections: Service Related L..., Work Orders (with a table showing WO-20140830-2426917 as Completed), Cases (listing Goodwill Credit James as Closed, Bill Cycle Change James as In Progress, and another Bill Cycle Change James as Closed), Service Attachments, and Case Comments.

When it is necessary to review a case made by a previous rep, select the subject name. Do not click edit.

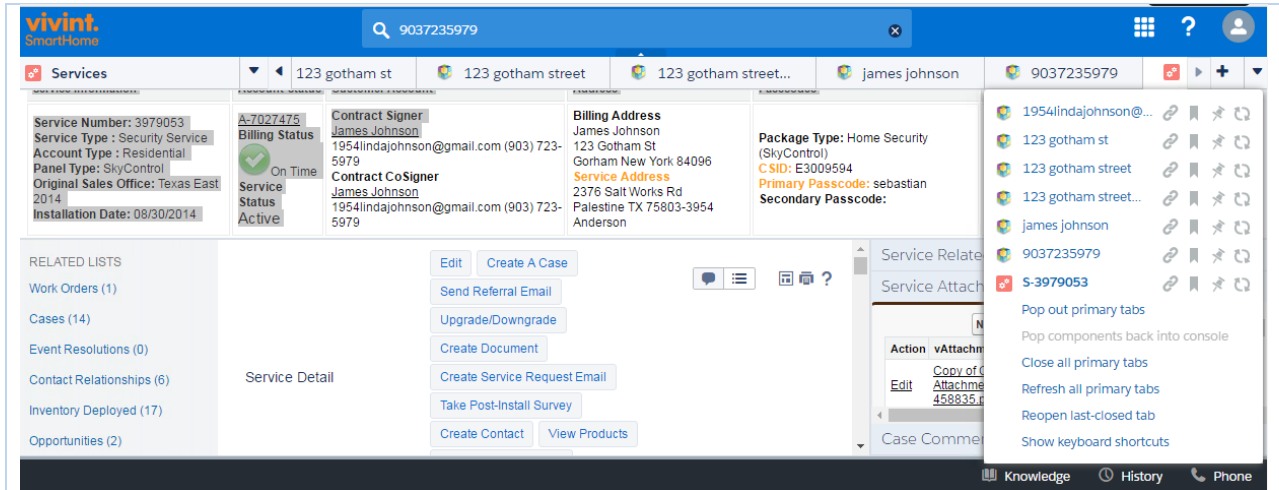
- Primary and Secondary Tab** – Sometimes when opening information to dig deeper into the account the information may appear as a primary or secondary level (or tab).



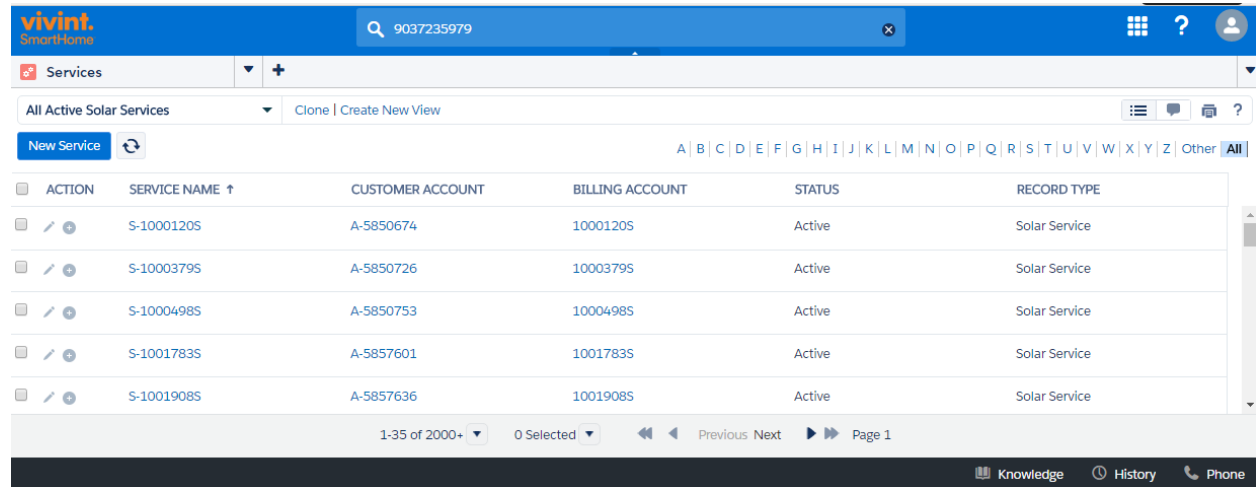
- Symbols/Colors: Most tabs maybe recognized by their symbols and colors.

Workforce Tab Icon	Tab	Description
	Services	Provides the service that the customer has such as security, solar, wireless internet, space monkey, lifelock, etc
	Billing	Provides access to their billing history such as invoices and payments.
	Work Orders	Generates a list of any work orders created on the customer's account.
	Case Comments	A summary of any case comment created on the customer's account.
	Contract Relationships	Anyone associated with the customer's account such as emergency contacts, individuals that have access to the online account center, etc.
	Inventory Deployed	A list of all devices/equipment in the customer's home.
	Subscriptions	Provides the service package the customer had in the past and current, the start and end date of the contract and the amount.

At the end of each call, click the downward arrow in the right hand corner.



Select Close all primary tabs. This clears all tabs and returns to the home page:



Key Learnings

Salesforce is the main system that Customer Care Specialist use to handle live calls. Always ask for the primary telephone number associated with the account. If this does not pull up the account, ask there could be another telephone number. If this does not work, ask for an email address, service address and finally as a last resort the name. When more than one account populates, verify the service address to ensure that the correct account is selected.

A customer may have more than just a security service. If they call with an issue for an account that relates to another service, this call is transferred to the proper department. Always pay close attention to the record type.

Review

1. What is the URL for the Salesforce used for training purposes?
2. Each trainee has a different user name and password for the test account.

TRUE FALSE
3. What is the best way to locate the customer's account?
4. When would the Customer Care Specialist use the customer's name to locate their account?
5. The service and billing address could be different.

TRUE FALSE
6. The primary passcode gives the caller the authority to make account maintenance changes.

TRUE FALSE
7. What is the difference between the account and service number?
8. If a customer has Space Monkey and Security services, how many account appear in the system?

Knowledge

Overview

This outlines in-depth “How to Articles”. Think of them as job aids with step-by-step instructions to troubleshoot a panel or device or navigate in Salesforce.

Objectives

- Locate Knowledge in Salesforce
- Distinguish the difference between Merlin and Knowledge
- Use key words to locate the correct article
- Refine results by using filters

Training Length

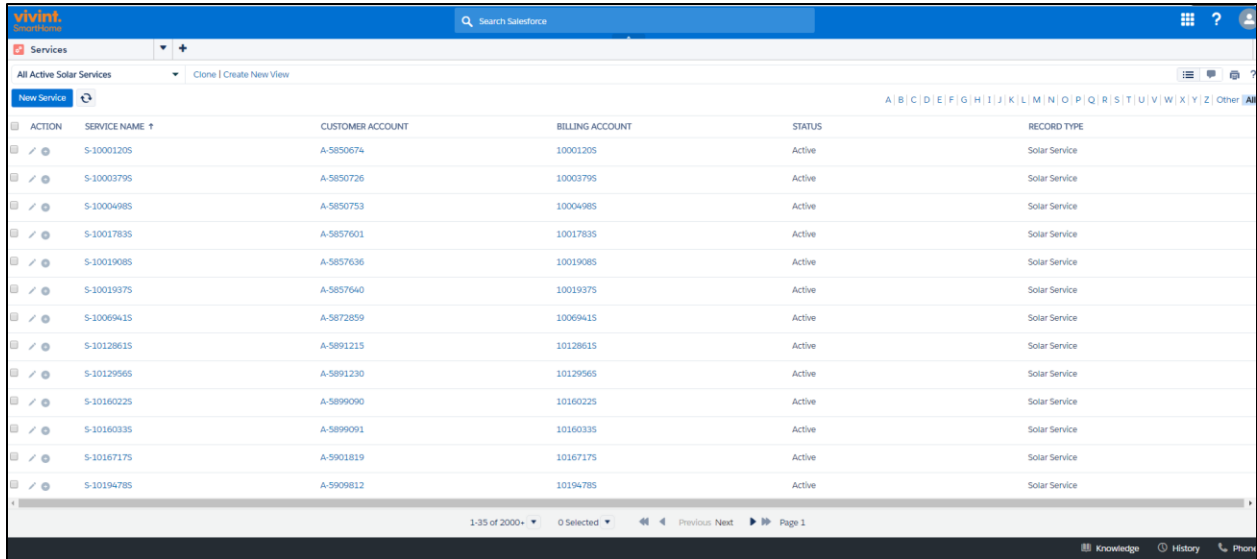
10 mins

Introduction

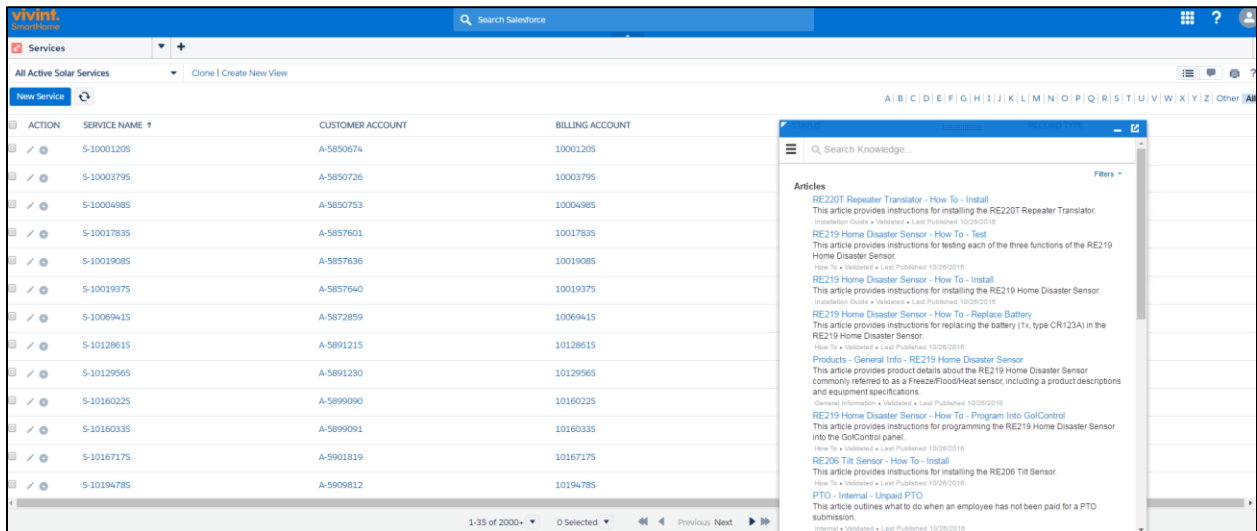
Knowledge is a source of information with instructions, processes, telephone number for all departments, pictures about devices, etc. Knowledge is not used to create cases.

Knowledge is accessible at anytime (whether or not the Customer Care Specialist is on a call). However, it can only be accessed after logging into VM Ware from Salesforce. Use this steps:

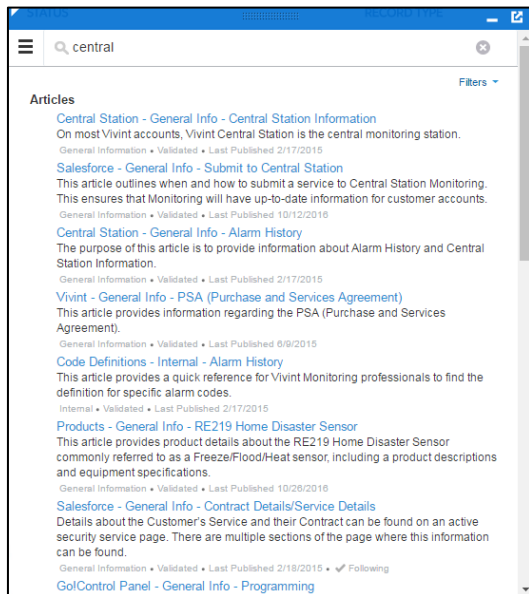
1. Click **Knowledge** in the lower right corner.



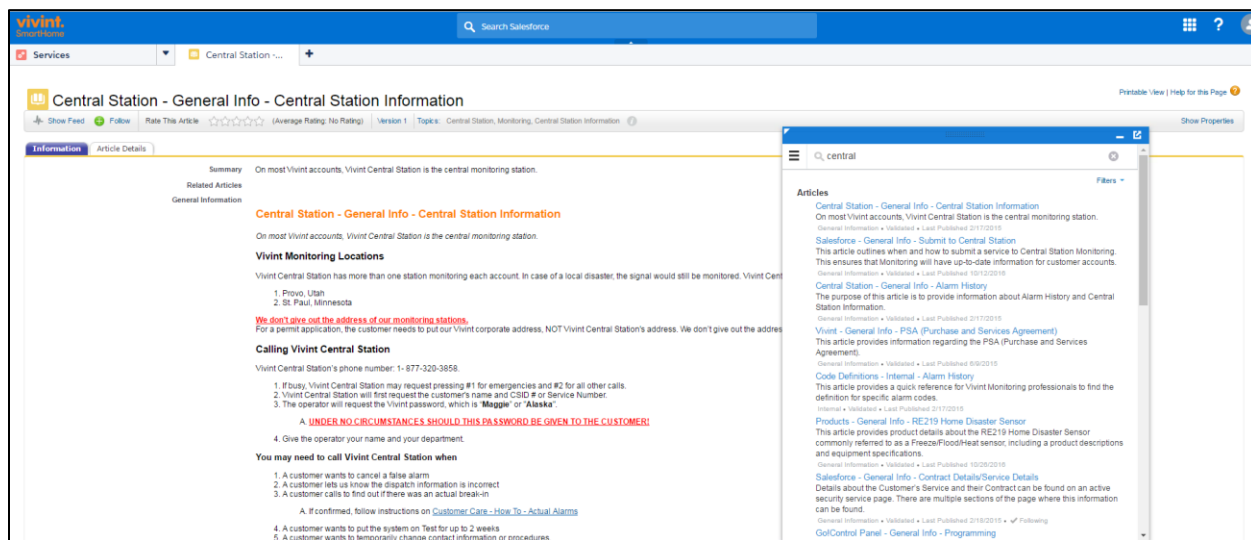
The following appears:



- Type in a key word(s) into the search box and press Enter. Less is best! Any article with the word(s) included in the search field populates in the search results. In the example below, the key word “central” was entered.

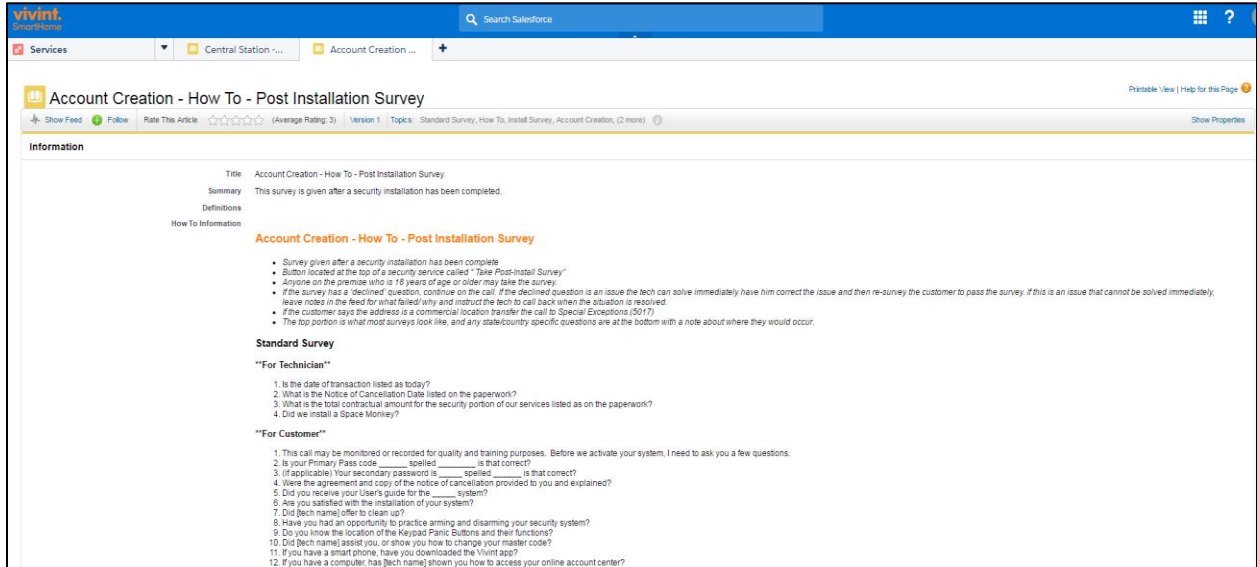


- Review the list for the desired article. It may not always be at the top of the list. Upon locating the article needed, click the title. The article appears as a tab in Salesforce.

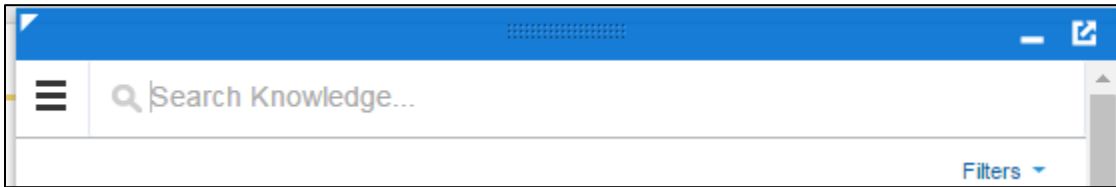


Key points about Knowledge:

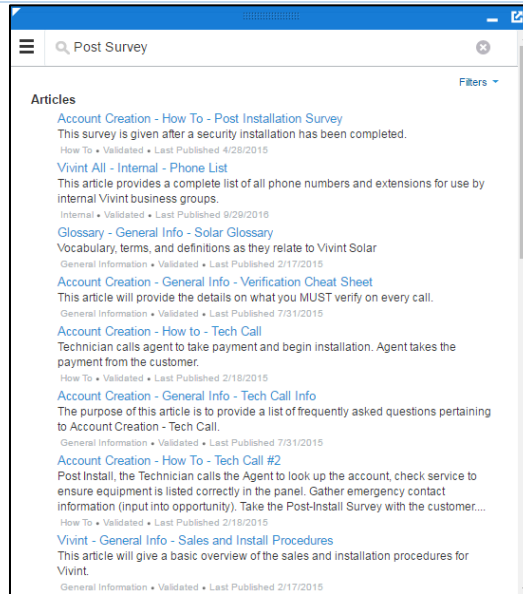
- More than one article can be displayed at one time.



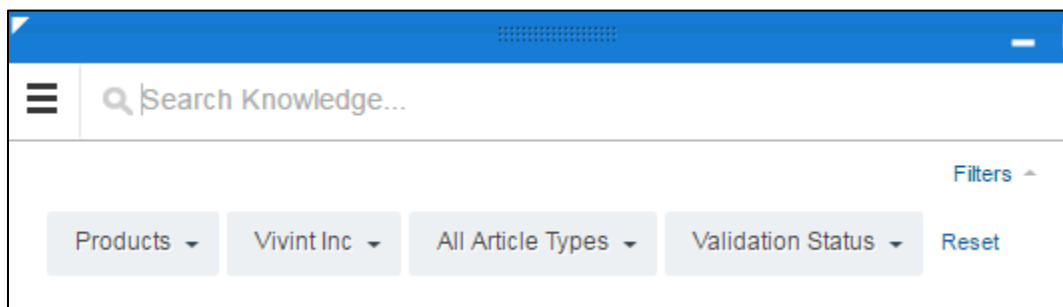
- To remove Knowledge, click the minimize button.



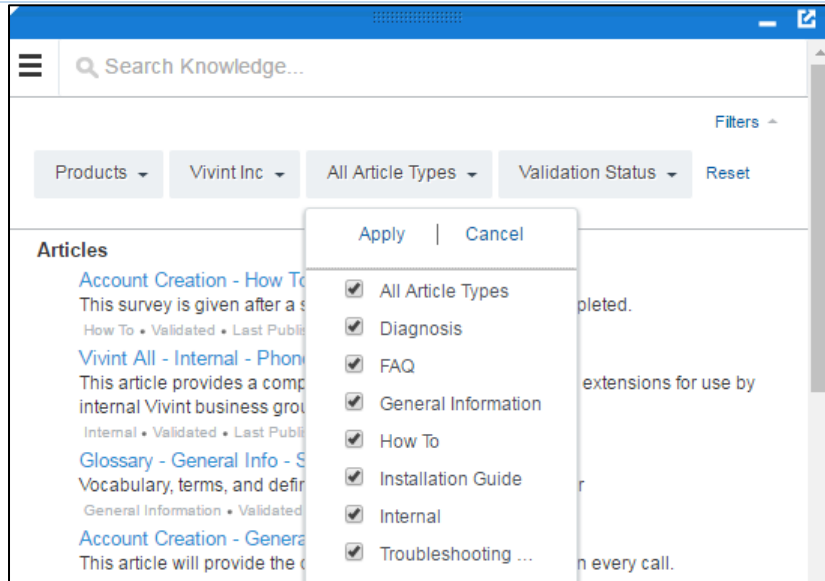
- All departments at Vivint use the Knowledge. Keep in mind that articles may appear in the search results that do not pertain to customer care. In the example below, the title of many articles start with Account Creation. These articles are specific to their department and not Customer Care.



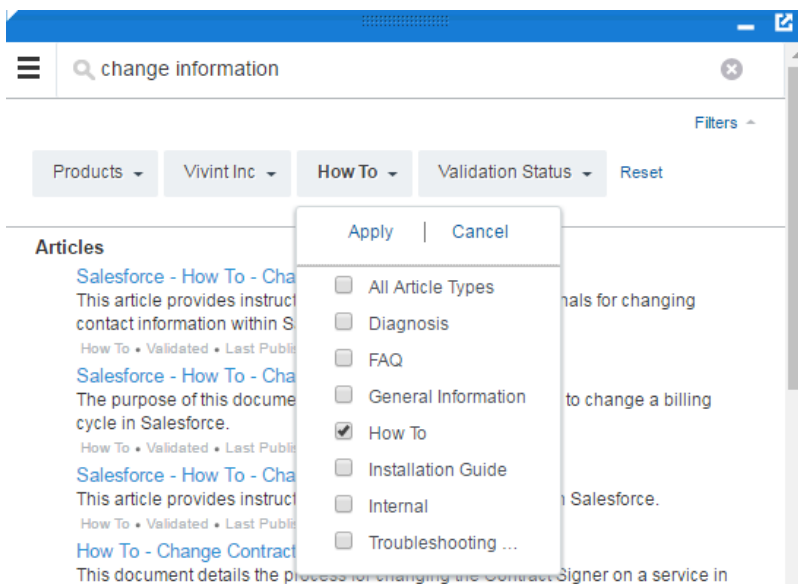
- Use the filters to refine the search results. Click Filters to display the following options:



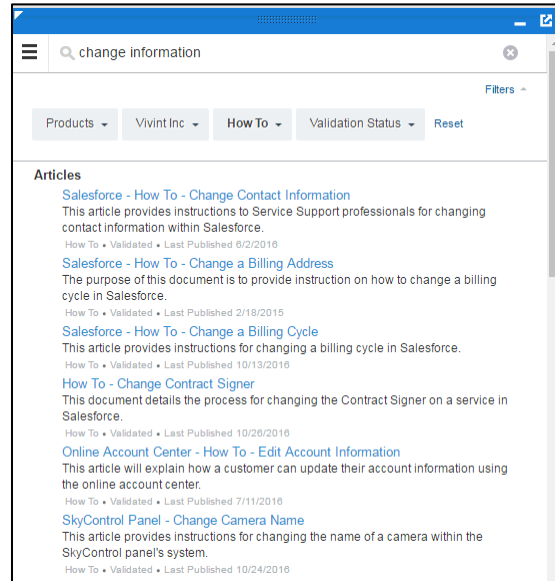
- Click the down arrow to unselect a specific type of article and click apply.



Let’s say that instructions are needed to change the customer’s telephone number. Type the key words “Change Information”, click filters, only check How To as shown below:



Click Apply and the following results appear:



The filters are optional. They can be used to eliminate certain articles from populating in the search results.

Key Learnings

Knowledge is the system used to locate policies, procedures on how a situation should be handled. Vivint has numerous department that have different functions and responsibilities. Knowledge is used by all departments. It is essential to only use articles that are applicable for handling Customer Care Tier 1 call types.

Review

1. Describe one reason to use Knowledge.
2. Where is Knowledge located?
3. Customer Care Specialists can access Knowledge without logging into Salesforce.

TRUE FALSE

4. Multiple articles display in separate tabs.

TRUE FALSE

5. Articles in Knowledge are only for Customer Care.

TRUE FALSE