Basic Customer Calls

Salesforce Practice Activity **Facilitator Overview**

Description of Activity

- ❒ Locate four existing customers in Salesforce by case number.
- ❒ Identify each customer's issue.
- ❒ Use TurboTax.com, the Agent Portal and other Salesforce tools to find a resolution.
- ❒ Document the outcome of the case through "Add Notes" option
- ❒ Use the "Close case" option to close case and end call.

Preparation for Activity

- ❒ Review the Activity Instructions completely before beginning the activity.
- ❒ Ensure all agents have access to the Salesforce Training website.
- ❒ Ensure agents are set up on IC Client phone for the test environment.
- ❒ Provide Agent Instruction Sheet and Contact Resolution Sheet to agents.
- ❒ Divide group into customers and agents to complete the activity.

Possible Roadblocks

- ❒ Agent cannot find resolution to customer questions.
- ❒ Agent can't navigate to "Add Notes" or "Close case" option.

Basic Customer Calls

Salesforce Practice Activity **Agent Instruction Sheet**

Overview of Activity

You will take four practice calls where you will locate customers in Salesforce by case number, identify their issue and provide them a resolution. The activities will require you to navigate TurboTax.com, utilize the Agent Portal and other Salesforce tools. You will document the outcome of the case by entering a note and then closing the case.

Instructions

Agents will take turns playing the role of a Customer or responding as an Agent:

Caller:

- ❒ Using Contact Resolution Sheet, create a case based on the question.
- ❒ Provide case number to Agent during practice call.
- ❒ If necessary, use Suggested Steps under the question to assist the Agent.

Agent:

- ❒ Log into Salesforce Training, IC Client phone and have TurboTax.com open.
- ❒ Greet the customer and located them in Salesforce by case number.
- ❒ Identified the customer's issue.
- ❒ Guide the customer through TTO or provide the correct answer to them.
- ❒ Ensured the customer is satisfied with the resolution and end the call.
- ☐ Document the case through "Add Notes" and Close the case.

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Salesforce Practice Activity

Contact Resolution Sheet

Question 1

Customer Contact Information:

Name: Jordan Appleburger

Email: Appleburger@testmail.XYZ

Phone: (308) 555-0000

Customer Question

How do I start my tax return?

Suggested Steps:

- ☐ Customer guided to Turbotax.com website
- ☐ Customer directed to "Start for Free" in center of page
- ☐ Confirmed with customer that they are "New or Returning"

Question 2

Customer Contact Information:

Name: Andy Raynott

Email: Raynott@testmail.XYZ

Phone: (808) 555-0000

Customer Question

What product would I use for my multi-member LLC?

Suggested Steps:

- ☐ Customer guided to AnswerXchange
    - Turbotax.com website
    - "Help" menu
    - "Get Answers 24/7"
- ☐ Customer types "LLC"
- ☐ Selects "Which TurboTax do I need to file as an LLC?"

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Contact Resolution Sheet

Question 3

Customer Contact Information:

Name: Max Southwark

Email: Southwark@testmail.XYZ

Phone: (999) 555-0000

Customer Question

I'm trying to login, but I forgot my password?

Suggested Steps:

- ☐ Customer guided to login screen fromTurbotax.com website
- ☐ Agent goes to "Login" Widget in Agent Portal
- ☐ Agent guides customer through process based on steps in widget.

Question 4

Customer Contact Information:

Name: Pat Hatman

Email: Hatman@testmail.XYZ

Phone: (000) 555-0000

Customer Question

How do I update my phone number in my online account?

Suggested Steps:

- ☐ Customer instructed to log into their TurboTax account
- ☐ Select "My Account"
- ☐ Select "Account Settings"
- ☐ Under "Security" tab, select "Edit" to update phone number