

FedPack CRM Training Script

Title of Module: FedPack CRM Training

Objectives

By the end of this module, learners will be able to:

1. Effectively open and close customer calls using scripts to ensure a friendly and professional experience.
2. Analyze CRM data and delivery maps to identify the root cause of shipment issues accurately.
3. Formulate and use open- and closed-ended questions to efficiently gather necessary details from customers.
4. Navigate the CRM system proficiently to retrieve and share accurate shipment information with customers.
5. Apply empathetic communication techniques to address customer frustrations and demonstrate FedPack's commitment to finding solutions.

Audience

- FedPak Customer Care Team members who interact with customers regarding lost, delayed, or damaged holiday orders.

Authoring Tool: Storyline 360 and Synthesia

Duration: 10 minutes

Screen ID #	On-Screen Text	Design Notes	VO/CC
1.0	FedPak [Title]	• Bright holiday visuals with cheerful background music. • The FedPak logo is prominently displayed. • Background: Use the primary brand color with the FedPak pattern overlay.	Welcome to FedPak's Customer Care training! This course will equip you with the skills to handle challenging situations and ensure every customer interaction is positive and productive. Please type in your first and last name then select the start course button to begin.

1.2	Customer Information Panel		Let's start by learning how to navigate the CRM, your primary tool for resolving customer issues. We'll explore its main sections with examples. Pay close attention, you'll soon get the chance to interact with the CRM interface yourself. In this section, you'll enter the customer's name, phone number, and tracking number. For example: - Name: Jane Doe - Phone Number: (123) 456-7890 - Tracking Number: FP484766352637 Once completed, click the 'Next' button to proceed to the complaint details panel.
1.4	Complaint Details Panel		In this section, you will record the customer's complaint to facilitate efficient tracking and categorization of issues, ensuring prompt resolution and improved service. Keeping a clear record of complaints allows you to address concerns effectively, identify recurring issues, and implement improvements to

			enhance customer satisfaction. Before documenting the Complaint Type, click on the Delivery Details Map to review the shipping details and track the package's journey.
1.5	• Delivery Details Map		Once reviewed, click next to proceed and enter the Complaint Type.
1.6	• Complaint Details Panel		Now you can identify the Complaint Type. The Delivery Map indicates a weather delay, with the delivery date marked as N/A. In this example, the Complaint Type is: "Package delivery was delayed due to severe weather conditions." The next step is to click on Root Cause and, based on the Delivery Map indicating a weather delay, select Weather. Once this step is complete, click Next to proceed to the solution section.
1.7	• Solution		In this section, you will record the solution to the customer's complaint. This step ensures the resolution process is clearly documented,

			follow-up actions are tracked, and improvements are effectively implemented. Providing detailed solution notes enhances accountability and supports maintaining high service standards. The Complaint Type, which in this example is "Package delivery was delayed due to severe weather conditions." has already been filled out. If new information becomes available and the complaint type needs to be updated, click the Edit button to make the necessary changes. If no updates are needed, proceed to enter the solution notes. In this example, the solution notes will be to notify the customer of the delay via email and confirm that a refund will be issued to their original payment method. Next, select the Solution for the complaint, in this instance, Refund. Finally, click the Next button to proceed to Step Four.
1.8	Follow-up		In this section, you will complete and document the follow-up action. Select Message, Phone Call, or

			Send Email to record the action in the system. Use the same option to communicate directly with the client. Once the follow-up action is completed, close the complaint in the system. Now it's time to navigate the CRM interface. Before proceeding, click the Close Complaint button to begin a quick Knowledge Check!
1.9	Knowledge Check [Title] Question: What is the correct sequence of steps to handle a customer complaint in the CRM? <i>Select the best answer.</i> A. Record the complaint, identify the root cause, document the solution, follow up with the customer, and close the complaint. B. Identify the root cause, follow up with the customer, record the complaint, document the solution, and close the complaint. C. Document the solution, follow up with the customer, record the complaint, identify the root cause, and close the complaint. D. Record the complaint, follow up with the customer, identify the root cause, document the solution, and close the complaint.	Correct Answer: A	What is the correct sequence of steps to handle a customer complaint in the CRM? <i>Select the best answer.</i>

1.10	Great job! Following this sequence ensures customer complaints are resolved efficiently and recorded accurately.	Correct Feedback Layer	Great job! Following this sequence ensures customer complaints are resolved efficiently and recorded accurately.
1.11	Not quite. The correct sequence starts with recording the complaint, followed by identifying the root cause, documenting the solution, following up with the customer, and finally closing the complaint.	Incorrect Feedback Layer	Not quite. The correct sequence starts with recording the complaint, followed by identifying the root cause, documenting the solution, following up with the customer, and finally closing the complaint.
1.12	As a FedPak representative, you are receiving a call from a customer. Listen carefully to their complaint and accurately fill out the interface fields based on the information they provide.		As a FedPak representative, you are receiving a call from a customer. Listen carefully to their complaint and accurately fill out the interface fields based on the information they provide.
1.13			Agent: Hi, this is your customer support representative from Fedpak. How can I assist you today?
1.14			Caller: Hi, I'm calling about a package that hasn't arrived. It was supposed to be delivered yesterday. Can you help me understand what's happening?

1.15			Agent: Absolutely! Let me look into that for you. Could you please provide your order details or tracking information?
1.16	Please input your details into the fields provided on your screen. This information is for practice only and will not be stored or shared.		Please input your details into the fields provided on your screen. This information is for practice only and will not be stored or shared.
	Please review the delivery map. Use this information to communicate with the customer about their package status.		Please review the delivery map. Use this information to communicate with the customer about their package status.
1.17	Thank you for providing that information. After reviewing the details, it appears that your package was lost in transit. I sincerely apologize for the inconvenience this has caused. Would you like me to process a refund for you?		Agent: Thank you for providing that information. After reviewing the details, it appears that your package was lost in transit. I sincerely apologize for the inconvenience this has caused. Would you like me to process a refund for you?
1.18			Caller: This is really frustrating! I absolutely needed the package today. I'll accept the refund and place a re-order. Thank you for your help.
			Agent: I completely understand your frustration, and I'm very sorry for the inconvenience this has caused. I'll

			process the refund for you right away.
1.19			Caller: Thank you!
1.20	Complete the interface using the details of the customer's complaint. After entering the complaint, identify and mark the root cause.		Complete the interface using the details of the customer's complaint. After entering the complaint, identify and mark the root cause.
1.21	Complete the solution notes using the customer's complaint and the delivery map details. Before proceeding, select the appropriate solution button to match the solution notes. Once done, click 'Next' to continue.		Complete the solution notes using the customer's complaint and the delivery map details. Before proceeding, select the appropriate solution button to match the solution notes. Once done, click 'Next' to continue.
1.22	Complete the follow-up section by specifying the mode of contact used to communicate with the customer. Then, click 'Close Complaint' to finalize the process.		Complete the follow-up section by specifying the mode of contact used to communicate with the customer. Then, click 'Close Complaint' to finalize the process.
1.23	Congratulations on completing this training! You now have the Let's review the key skills you've developed.		Congratulations on completing this training! You now possess the skills to: • Effectively open and close customer calls using scripts to ensure a friendly and professional experience. • Analyze CRM data and delivery maps to accurately identify the root cause of

			shipment issues. • Formulate and use open- and closed-ended questions to efficiently gather necessary details from customers. • Navigate the CRM system proficiently to retrieve and share accurate shipment information with customers. • Apply empathetic communication techniques to address customer frustrations and demonstrate FedPack's commitment to finding solutions. By applying these skills, you'll enhance customer satisfaction and professionalism in every call. Here is your certification as a testament to your successful completion of this course. Keep up the great work!
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