

TRAINING MANUAL: NEW AGENT ONBOARDING

Organization: NA Telecommunications & Internet Services

Department: Training & Development

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Welcome to the Team

Welcome to [Company Name]! Over the next four weeks, you will undergo a comprehensive training program designed to equip you with the technical knowledge, soft skills, and system expertise needed to deliver world-class support to our broadband and mobile customers.

WEEK 1: System, Culture & VocalMind AI

Objective: Understand our company values and master the VocalMind Quality Assurance interface.

1.1 Company Overview

- **Mission:** Connecting our community with speed, reliability, and care.
- **Core Values:** Transparency, Customer-First Problem Solving, and Technical Excellence.

1.2 Introduction to VocalMind AI

We utilize **VocalMind**, an advanced AI-powered Quality Assurance system. VocalMind records, transcribes, and analyzes 100% of your calls in real-time. It is not just a grading tool; it is your personal automated coach.

How it Works:

1. **Recording:** Every interaction is captured securely.
2. **Transcription:** Speech-to-Text engines convert audio to a searchable script.
3. **Analysis:** The AI evaluates sentiment, keywords, and tone against our standards.

1.3 Your Agent Dashboard

You will log in to the VocalMind Dashboard daily to track:

- **Calls Handled:** Total volume of inbound/outbound calls.
- **Average Score:** Your running quality average (Target: >4.0).
- **Active Time:** Time spent talking vs. hold time.
- **First Contact Resolution (FCR):** Percentage of calls that do not result in a callback within 7 days.

1.4 AI Scoring Metrics

VocalMind assigns three primary scores to every call:

| Metric | Range | Definition |
|-------------------------|-----------------|---|
| Overall Score | 0 – 5.0 | The aggregate quality of the interaction. (Passing: 3.5+) |
| Compliance Score | 0 – 100% | Did you follow mandatory laws? (Target: 100%) |
| Sentiment Score | 0 – 100% | Did the customer end the call happier than they started? |

1.5 Skill Evaluation Categories

The AI grades five specific competencies on a 5-point scale:

1. **Empathy:** Acknowledging emotion (e.g., "I understand your frustration").
2. **Clarity:** Speaking pace, lack of filler words ("um," "uh"), and clear explanations.
3. **Problem Solving:** Did you find the root cause effectively?
4. **Product Knowledge:** Accuracy of technical information provided.
5. **Policy Adherence:** Following authentication and privacy rules.

1.6 Reading AI Coaching Tips

- **Automated Feedback:** After every call, VocalMind generates a "Coaching Tip."
 - *Example:* "You interrupted the customer 3 times. Try to pause for 2 seconds after they finish speaking."
- **Action:** Review your lowest-scored calls daily and read the AI's suggestions to improve for the next shift.

WEEK 2: Products, Systems & Troubleshooting

Objective: Master the Telecom product suite and CRM navigation.

2.1 Product Portfolio

- **Mobile:** Prepaid vs. Postpaid, Data Caps, International Roaming, eSIM activation.
- **Home Internet:** Fiber vs. DSL speeds, Router capabilities, Mesh WiFi systems.
- **Bundles:** Family Plans and "Quad-Play" discounts (Mobile + Internet + TV + Landline).

2.2 CRM System Navigation

- **Oracle/Salesforce Interface:** How to locate a Customer Profile.
- **Identity Verification (ID&V):** The mandatory 3-point check (Name + PIN/Account Number/Last 4 of SSN).
- **Note Taking:** Standard notation format (Issue -> Action -> Resolution).

2.3 Common Troubleshooting Scenarios

You will roleplay these scenarios using the Knowledge Base scripts:

- **"No Signal" (Mobile):** Reseating SIM cards, checking airplane mode.
 - **"Slow WiFi" (Internet):** Speed testing, router channel optimization.
 - **"Bill Shock" (Billing):** Explaining prorated charges and taxes.
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WEEK 3: Policy, Compliance & Authority

Objective: Learn the legal boundaries and operational rules.

3.1 Call Opening & Closing

- **Mandatory Opening:** "Thank you for calling [Company]. My name is [Name]. This call may be recorded for quality and training purposes."
- **Critical Flag:** VocalMind will auto-fail any call where the **Recording Notification** is missed.

3.2 Privacy & Data Handling

- **GDPR/CCPA:** How to handle "Right to be Forgotten" requests.
- **PCI-DSS:** Never repeat credit card numbers out loud. Pause recording during payment entry (if applicable).

3.3 Escalation Procedures

- **Trigger:** Customer requests supervisor OR "Angry" sentiment > 2 minutes.
- **Process:** Warm Transfer to Tier 2 or Team Lead.

- **De-escalation:** Use the A-E-S method (Acknowledge, Empathize, Solve).

3.4 Refund Authority Levels

- **Agent (You):** Up to **\$25.00** (One-time courtesy).
 - **Senior Agent:** Up to **\$75.00**.
 - **Team Lead:** Up to **\$200.00**.
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WEEK 4: Shadowing & Assessment

Objective: Transition from theory to live practice ("Nesting").

4.1 Model Call Listening

- **Assignment:** Listen to 20 "Golden Tapes" selected by VocalMind. These are calls that scored 5.0/5.0 in Empathy and Problem Solving.

4.2 Supervised Calling (Nesting)

- **Requirement:** Handle 10 live calls with a Team Lead plugged in (listening only).
- **Feedback:** Immediate debrief after every call.

4.3 Final Assessment

1. **Compliance Quiz:** Must score **90% or higher** to pass.
 2. **VocalMind Review:** Your first 10 calls must average a score of **3.0 or higher**.
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5.0 Ongoing Training & Resources

5.1 Continuous Learning Modules

Available in the Learning Management System (LMS):

- *Module A:* Customer Empathy & Active Listening.
- *Module B:* Privacy Policy Updates (Annual).
- *Module C:* Handling Difficult/Abusive Customers.
- *Module D:* Advanced Technical Troubleshooting (Tier 2 Prep).
- *Module E:* De-escalation Techniques.

5.2 Monthly Refresher Quizzes

- Short, 5-question quizzes delivered via email to ensure retention of product changes.

5.3 Performance Improvement Plans (PIP)

- **Trigger:** If an agent's VocalMind Overall Score falls below **3.5** for **2 consecutive weeks**.
 - **Action:** Mandatory coaching session with Team Lead and reassignment of LMS Module A & D.
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APPENDIX A: FIRST CALL CHECKLIST

Print this page and keep it at your desk for your first week.

PHASE 1: THE OPENING

- [] **Greeting:** "Thank you for calling [Company]. My name is [Name]."
- [] **Recording Notice:** "This call may be recorded for quality assurance."
- [] **Identity Verification:** "May I have your full name and Account PIN?"

PHASE 2: THE DISCOVERY

- [] **Listen:** Let the customer speak without interrupting.
- [] **Acknowledge:** "I understand you are calling about [Issue]. I can help with that."
- [] **Empathize:** "I know how frustrating it is to be without internet."

PHASE 3: THE SOLUTION

- [] **Troubleshoot:** Use the Knowledge Base scripts.
- [] **Hold Time:** "May I place you on a brief hold for 2 minutes while I check the line?" (Check back if longer!)
- [] **Explain:** Tell the customer *what* you are fixing and *why* it happened.

PHASE 4: THE CLOSING

- [] **Recap:** "To summarize, we reset your router and speeds are back to normal."
 - [] **Offer Help:** "Is there anything else I can help you with today?"
 - [] **Notes:** Enter case notes into CRM within 5 minutes.
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Approved by: Director of Training

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