

Training content

1. What is IT Services?
2. Technical support/ Non technical support
3. Telemarketing/ Cold calling
4. Support Tools
5. Google office Products
6. Azure cloud services
7. Free Azure account creation
8. Azure Resources Creation/Troubleshooting
9. Upwork Profile creation
10. How to search and send Upwork proposals
11. How to answer common Upwork proposal questions
12. Tools needed for Upwork jobs
13. Support assistance and job recommendations from me
14. Further 1:1
15. Bonus: Free courses recommendation and how to get financial aids for paid courses.
16. Exam dumps and training materials for those that wish to go into Cloud computing (Azure)
17. Monetizing all skills via Fiverr/Upwork and other Remote platforms
18. Quizz

What is IT services?

IT services are technology functions that are offered with support and management. This allows customers to use information technology without managing complexities such as maintenance, security, scalability, and resilience. IT services may be offered by internal teams or external partners. They typically offer help desk for support and an SLA (**service-level agreement**) that defines the quality of the services.

The following are common examples of IT software services.



Knowledge Management.

Software for controlling and sharing knowledge such as document management platform. Here we have Google Drive, Onedrive, Dropbox etc

Media

Software for creating and publishing media such as video publishing platform: Youtube

Communication

Communication tools such as chat, email, voice, messaging, and telepresence. Here we have, Skype, slack, Teams, Hubspot, Zendesk, Intercom, tc

[\(521\) How to use zendesk for customer service! - YouTube](#)

[\(521\) Intercom vs Customer.io vs Zendesk Connect? What's the Best Tool? - YouTube](#)

[\(521\) Hubspot CRM Tutorial for Free Marketing, Sales and Customer Service Tools - YouTube](#)



Business Processes

Technologies for orchestrating and choreographing business process such as workflow engine.

Trello, Monday.com, Zapier, Trackify, Nifty.

End-user Device

Management and support for a fleet of technology devices. For examples, an IT service that manages all the computers and mobiles devices assigned to employees at a firm. Remote tools like Fresdesk, LogMeIn, Team, Google meet, Zoom



Technical Support

Technical support refers to services that entities provide to users of technology products or services. In general, technical support provides help regarding specific problems with a product or service, rather than providing training, provision or customization of the product, or other support services.

The Role of IT Support

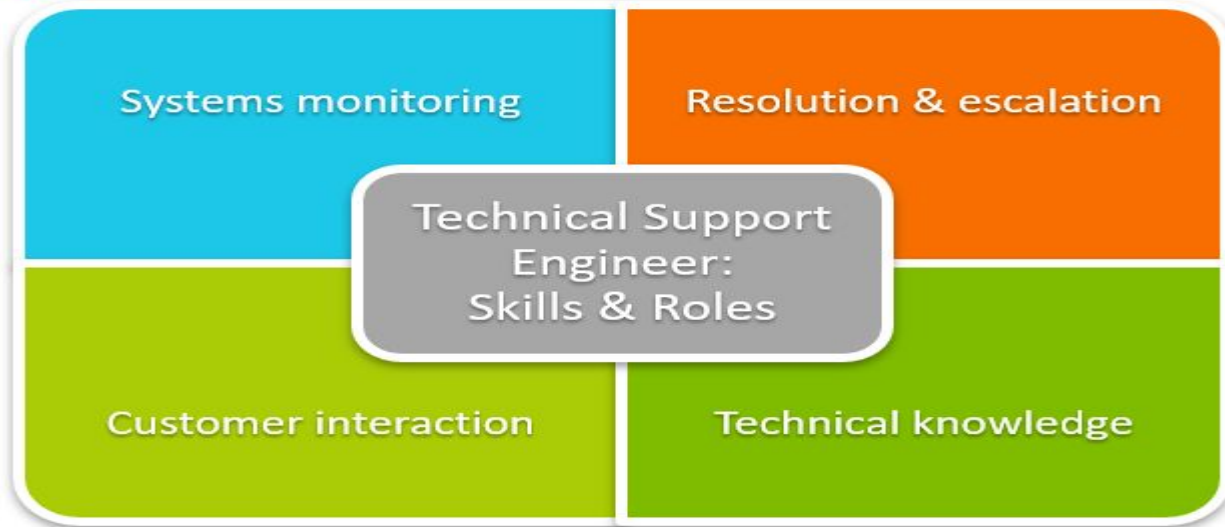
You will diagnose and troubleshoot software and hardware problems and help customers install applications and programs. Technical Support Engineer responsibilities include resolving network issues, configuring operating systems and using remote desktop connections to provide immediate support.

Tech Support Engineers can:

- Look for causality
- Diagnose the issue
- Resolve it



A technical support engineer might have a variety of responsibilities, requiring a diverse skill set.



Customer service (Non Technical)

Customer service is the provision of service to customers before, during, and after a purchase. The perception of success of such interactions is dependent on employees "who can adjust themselves to the personality of the guest" (customer).

Even today, when much of customer care is handled by automated self-service systems, the option to speak to a human being is seen as necessary to most businesses. It is a key aspect of servant-leader.

[Free Customer Service Tutorial - Customer Support Skills | Udemy](#)


[Free Customer Service Tutorial - Best practices in Customer support | Udemy](#)

[\(142\) Customer Service Skills - Video Training Course | John Academy - YouTube](#)



What is excellent customer service?

What does good customer service look like?

- ask the right questions
 - actively listen to your customer
 - focus on the customer and adapt your approach to different customers
 - treat the customer the way you would like to be treated
 - exercise good judgment
 - have in-depth knowledge of your product or service
 - be helpful even if it is not going to result in a sale
 - do what you say you will
 - view a customer's complaint as an opportunity to gain the customer's respect
 - resolve complaints helpfully and patiently
 - strive for continual improvement by gathering valid data regularly about your customers and what they want from you
- 

Customer Service Role list:

- Manage large amounts of incoming phone calls
- Generate sales leads
- Identify and assess customers' needs to achieve satisfaction
- Build sustainable relationships and trust with customer accounts through open and interactive communication
- Provide accurate, valid and complete information by using the right methods/tools
- Meet personal/customer service team sales targets and call handling quotas
- Handle customer complaints, provide appropriate solutions and alternatives within the time limits; follow up to ensure resolution
- Keep records of customer interactions, process customer accounts and file documents
- Follow communication procedures, guidelines and policies
- Take the extra mile to engage customers

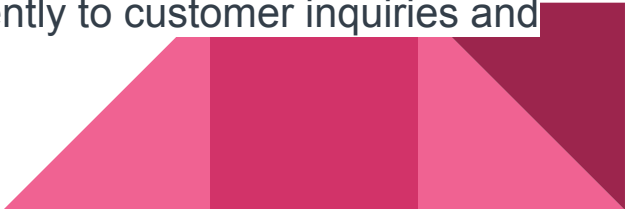


What does a Customer Service Representative do?

A Customer Service Representative, or CSR, will act as a liaison, provide product/services information, answer questions, and resolve any emerging problems that our customer accounts might face with accuracy and efficiency.

The best CSRs are genuinely excited to help customers. They're patient, empathetic, and passionately communicative. They love to talk and understand the value of good communication skills. Customer service representatives can put themselves in their customers' shoes and advocate for them when necessary. Customer feedback is priceless, and these CSRs can gather that for you. Problem-solving also comes naturally to customer care specialists. They are confident at troubleshooting and investigate if they don't have enough information to answer customer questions or resolve complaints.

The target is to ensure excellent service standards, respond efficiently to customer inquiries and maintain high customer satisfaction.



5 Things Your Customers Expect from you.


Meeting Customer Expectations is a top priority for many companies. According to research by Forrester published on [Fonolo](#), nearly 95% of business leaders say that providing a customer experience is a top strategic priority and 75% want to use customer experience as a competitive advantage.

For you to satisfy the needs of your Customers you must know what it is they want.

Here are 5 things your Customers expect from you.

Customers want you to understand their needs

A Customer is likely to be frustrated and offended if a product delivered or services rendered do not solve the current need. Customers want you to first, understand their needs and expectations. The business should be able to meet what the customer hopes to obtain and also what they would find acceptable.

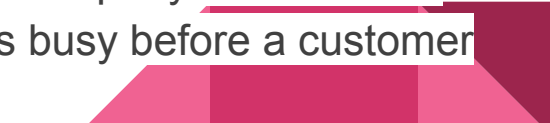


Customers want to reach you in multiple ways

Many customers may prefer one channel over another. Some of them may want to reach you via email while others would prefer a phone call. The millennials may want to interact with your business via social media channels. Your business should position itself in all digital channels and be open to entertain inquiries and converse Swifty with existing and prospective clients.

Customers want quick responses

Your customers want you to respond to their requests as soon as possible. One study shows that on Twitter, about 53% of customers expect a brand to respond to them in under an hour. Of course, if your business can respond in a few minutes, the customers would be happy to do business with you and this leads to customer retention. Every company should make good use of technology to reduce wait times and keep customers busy before a customer care agent picks the request up.

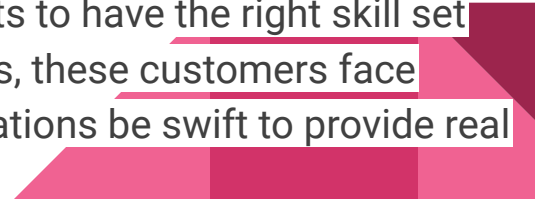


Your Customers want a personalized experience, not generic responses.

Sales is emotional. Customer service should be made as personal as possible. Each Customer is different and unique. What works for one Customer may not work for another. Communications should be personalized to each Customer. Try to use their personal names, titles and remember some details about them. It shows you are really interested in them and this makes their heart glad.

Your Customers expect you to solve their problems

You are in business to solve problems and get rewarded financially because of this. So when your customers come to you, they expect your product or service would solve their problems. When they make an inquiry, it is because they are interested in your brand and the business and may likely do business. These customers at times want a quick resolution to what they struggle with. Every business should do its best to equip front-line Customer service agents to have the right skill set and tools that would help them resolve Customers' issues. Sometimes, these customers face challenges using the product or service you sold to them, in such situations be swift to provide real support to them.



What Is Telemarketing/Cold calling

Telemarketing is the direct Marketing of goods or services to potential customers over the telephone, Internet, or fax. Telemarketing may either be carried out by telemarketers or increasingly, by automated telephone calls or "robocalls." The intrusive nature of telemarketing, as well as reports of scams and fraud perpetrated over the telephone, has spurred a growing backlash against this direct Marketing practice. Telemarketing may also be referred to as "telesales" or "inside sale."



How Telemarketing Works

Telemarketing involves the practice of contacting, vetting, and approaching potential customers. It does not include the use of direct emails marketing methods. The term was first used in the 1970s with the advent of a new, cheaper class of outbound long-distance telephone services and inbound toll-free services. The practice of telemarketing take may take place from a call center, an office, or, increasingly, a home. Many times, telemarketing can involve a single call to assess interest or suitability, and then follow-up calls to pursue a sale. Various data may be used to narrow down large databases of names to a small number of higher-probability customer prospects.

Telemarketing is used by for-profit businesses, non-profit charities, political groups and candidates, surveying, donation solicitation, marketing research, and other kinds of organizations.



Telemarketing Activities

The act of telemarketing can be divided into four subcategories:

- Outbound: Customer prospects and existing customers are actively reached out to via outbound telemarketing calls, also known as "cold" calls.
- Inbound: These telemarketing calls are based on inbound inquiries about products or services as prompted by advertising or sales efforts. These are considered "warm" calls as customers will typically have submitted an interest form online or already be familiar with the company.
- Lead generation: The collection of intelligence about the profiles, interests, and demographic data of potential customers.
- Sales: The persuasive activity engaged in by salespeople, in which telemarketers are trained and aim to close a deal on the phone.

Telemarketing may entail a variety of activities, such as surveying, appointment-setting, telesales, database maintenance and cleaning, and providing a call to action.

[\(142\) Cold Calling Basics - YouTube](#)

[\(142\) How to Write Cold Emails That Always Get Read - YouTube](#)



Support Processes.

Phone Support: [\(142\) Customer Connections: Phone Skills for Outstanding Service - YouTube](#)

[\(142\) How to Communicate Successfully Using Email: Customer Service Training - YouTube](#)

Email Support: [\(142\) Writing emails in customer support: 6 tips you can use \(ACTIONABLE\) | Freshworks Academy - YouTube](#)

Live Chat: [\(142\) 13 tips how to improve your customer support - YouTube](#) [\(142\) Live Chat Customer Service Tips - YouTube](#)



What is Google suite?

Formerly it was known as Google Apps for Work and Google Apps for Your Domain, G Suite is a brand of cloud computing, productivity, collaboration and communication tools developed by Google.

Businesses worldwide are becoming competitive day by day.

For succeeding in such a competitive environment, businesses require tools that foster communication and collaboration between employees.

This demands more efficient workplace solutions that can enhance the workflow and improve communication between the employees.

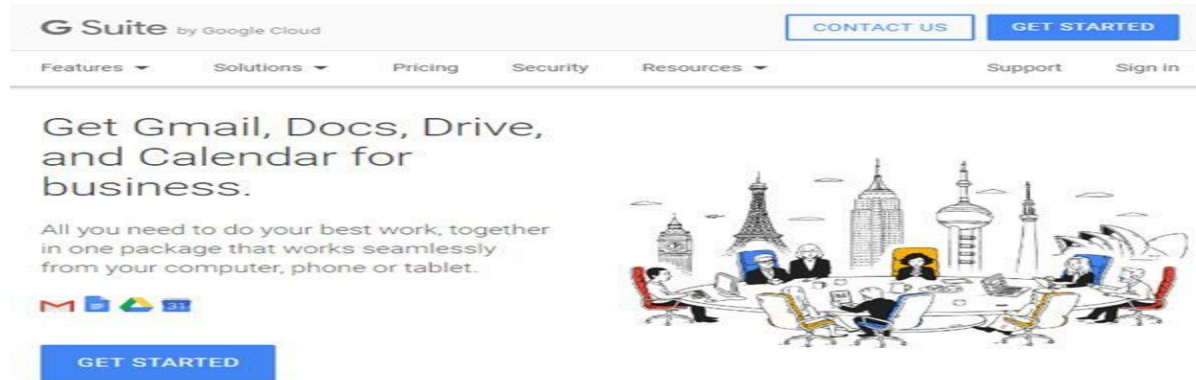
So, if “performance” matters to you, then your business needs to use tools that go on to streamline communication and collaboration between your employees.



Google G Suite is one of the most affordable, scalable, and professional solutions for businesses (and even for individuals) looking to meet their sophisticated email, collaboration, storage, and other digital communication needs.

G Suite offers a set of tools to boost productivity, enhance workflow, and improve communication and collaboration between your employees.

G Suite is a complete package of powerful tools for managing all of your business tasks online. It is an intuitive set of applications that are not only easy to set up but also simple to work with.



Benefits of using G Suite

Here, we list out the reasons why you should move your business from free Gmail to G Suite. So, here are the benefits of using G Suite.


Custom Business Email Addresses

With G Suite, you can have custom business email addresses (like @yourcompany.com) and get the same Gmail user experience that you and your staff is used to work with. Furthermore, no training is required for current Gmail users. Plus, you need to go through straightforward one-time setup procedure for using your domain for the G Suite email addresses.

Email Account Ownership

If you use G Suite, then all your employee email accounts are owned by your company. So, your employees don't own them. When someone leaves your company, the G Suite administration panel allows you to change that person's password immediately.

You can forward any emails which are sent to their address to someone else. Furthermore, you are allowed to access all the email history of that person.



File Ownership

Another big benefit of using G Suite is that all Google Docs, Sheets, Slides that are created by any employees are owned by the company. You can come up with a company policy that mandates employees to back up their local PC or Mac work folders & files to the Google Drive of your company.

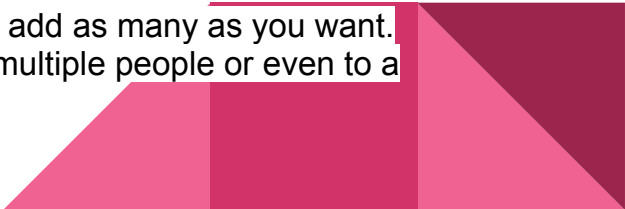
So, if any employee leaves your company or decides to terminate an employee, you would still have full access to all of their business files.

Document Sharing

G Suite makes it easier to share documents with your team when you all are using the same G Suite account. For instance, you can easily give all employees view-only access for a Google Doc using G Suite with just a few clicks.

Group Email Addresses


With G Suite, you can create group email addresses at no additional cost. You can add as many as you want. Furthermore, you can easily route emails sent to (support@yourcompany.com) to multiple people or even to a customer service system like Zendesk, Salesforce, or Freshdesk.



More File Storage

For free Gmail accounts, the default storage provided is 15GB. However, with G Suite Basic it is 30GB per user. G Suite also provides options for increasing the storage beyond the 30GB per user.

Other Benefits Include:


- With G Suite, you have 24/7 phone, email, and chat customer support.
 - You can display your company's logo within all of G Suite.
 - Comes with CRM Integration.
 - Extra Security with 2-Step Verification
 - Single Sign-On To Other Business Applications such as DocuSign, Marketo, Salesforce, and Slack.
 - G Suite offers a new online meeting experience with Hangouts Meet.
 - Cost effective
- 

Cloud Computing: Azure

Microsoft Azure, formerly known as Windows Azure, is Microsoft's public cloud computing platform. It provides a range of cloud services, including compute, analytics, storage and networking. Users can pick and choose from these services to develop and scale new applications, or run existing applications in the public cloud.

The Azure platform aims to help businesses manage challenges and meet their organizational goals. It offers tools that support all industries -- including e-commerce, finance and a variety of Fortune 500 companies -- and is compatible with open source technologies. This provides users with the flexibility to use their preferred tools and technologies. In addition, Azure offers 4 different forms of cloud computing: infrastructure as a service (IaaS), platform as a service (PaaS), software as a service (SaaS) and serverless.

Once customers subscribe to Azure, they have access to all the services included in the Azure portal. Subscribers can use these services to create cloud-based resources, such as virtual machines (VM) and databases.



Account Creation

Offer Details: [Offer Details | Microsoft Azure](#)

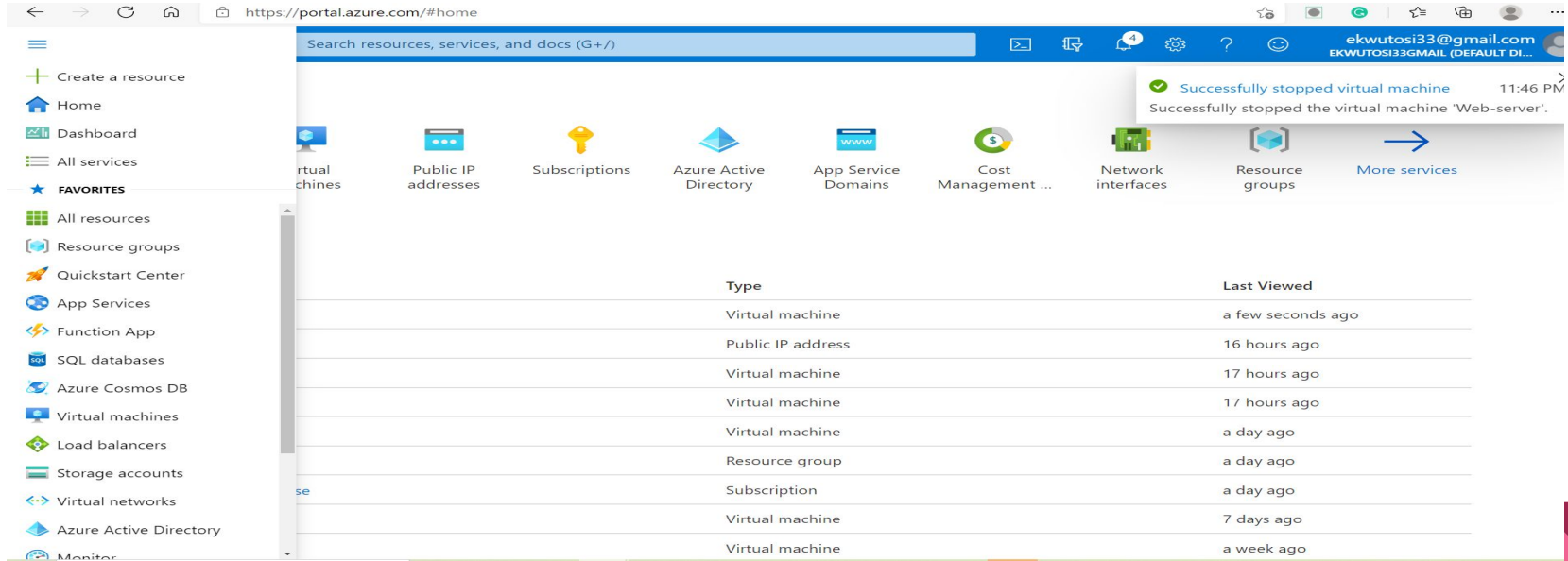
Here is where we have all offers and subscriptions being offered by Microsoft azure.

However, for the purpose of this class, you all can create a free trial account.

[Create your Azure free account today | Microsoft Azure](#)



Azure Resources Creation/Troubleshooting



The screenshot shows the Azure portal home page. The left sidebar contains navigation links: 'Create a resource', 'Home', 'Dashboard', 'All services', 'FAVORITES', 'All resources', 'Resource groups', 'Quickstart Center', 'App Services', 'Function App', 'SQL databases', 'Azure Cosmos DB', 'Virtual machines', 'Load balancers', 'Storage accounts', 'Virtual networks', 'Azure Active Directory', and 'Monitor'. The main area displays a search bar and a row of resource icons: Virtual machines, Public IP addresses, Subscriptions, Azure Active Directory, App Service Domains, Cost Management, Network interfaces, Resource groups, and More services. Below this is a table of resources.

Type	Last Viewed
Virtual machine	a few seconds ago
Public IP address	16 hours ago
Virtual machine	17 hours ago
Virtual machine	17 hours ago
Virtual machine	a day ago
Resource group	a day ago
Subscription	a day ago
Virtual machine	7 days ago
Virtual machine	a week ago

A notification banner at the top right states: 'Successfully stopped virtual machine' at 11:46 PM, with the message 'Successfully stopped the virtual machine "Web-server".'


Upwork Profile creation

Upwork is a global freelancing platform where businesses connect with freelance professionals so as to connect and collaborate remotely for work.

Found in 2015, when Elance-Desk rebranded to Upwork Global Inc., the company is based out of San Francisco, California, and has over twelve million registered freelancers and over five million registered clients. Upwork features jobs for millions of freelancers around the world be it as a web developer, a writer, or an accountant.

To create an Upwork account one needs to create a detailed profile which would include a link to your accounts, a profile photo, your title, an introduction video, a list of all your professional skills, an assessment of your English skills, your employment history, and details about your education. While these are the basic requirements to create an Upwork profile, it doesn't guarantee an approval, nor does it make sure that you get high paying projects. In order to get your Upwork profile approved one needs to make sure that all the provided information is correct and up-to-date.

Nonetheless, the response at Upwork is not always ten on ten. There are indeed a few things you need to keep in check or you can do to ensure that your Upwork profile gets approved.



1. Make sure you are providing authentic personal data
2. Your Upwork profile needs to be 100% complete
3. Make sure that you have taken Upwork's readiness test
4. Take skill tests that are relevant to your job profile
5. Make sure you have only one Upwork profile
6. Find a client to hire you via Upwork
7. Join an Upwork agency
8. Build your profile around skills in demand

[How to Create an Upwork Profile \(with Pictures\) - wikiHow](#)

[How To Get Work On Upwork With No Experience \[Freelancer Guide\] \(myhq.in\)](#)

[9 Tips to Help You Create a Freelancer Profile That Stands Out | Upwork](#)

<https://digest.myhq.in/importance-of-networking-freelancers/>

[12 Best Apps For Freelancers To Stay Productive And Organised \(myhq.in\)](#)

[Stay Safe By Including These 9 Things In Your Freelance Contract \(myhq.in\)](#)

How to search and send upwork proposals

once you find a project you're interested in, you can use your Connects balance to submit a proposal. Most freelancers take this opportunity to introduce themselves and tell the client why they'd be a good fit for the role.

To submit a proposal

1. Click the **Submit a Proposal** button on the job post page
2. Set your **Hourly Rate** or **Bid** on fixed-priced projects
3. Write an introductory **Cover Letter** for the project
4. Answer any screening questions the client may ask
5. Add attachments, such as work samples, to your proposal
6. Click the **Submit a Proposal** button.

[Submitting a Winning Proposal on Upwork](#)

[How to Create a Proposal that Wins Jobs](#)




How to answer common upwork proposal questions

1. Restate their core problem.

In this example, after a quick “Hello!” I restate the customer’s problem to them using their own words. “I see that you need help offloading and upgrading some of your financial processes in your growing business.” There are a couple reasons why it’s important that this be first, and I’ll cover this in more detail subsequent blogs, but for now, trust me on this, it’s important.

2. Tell them you can help solve their problem, and that you can start right away.

This is the only section of my proposal that I rarely change. I literally tell them “I can help you with that, and can start right away”. The key here is that the client is looking for someone to help with a problem they’re having. They want a solution, and they want it fast. By telling them you want to help them and that you can get started right away, you’re providing a vision of a solution on the horizon, and that’s what they want.



3. Tell them why you're a good fit

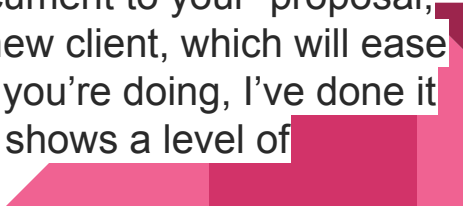
Next, I write two or three sentences on why you're a good fit. It doesn't need to be lengthy for the sake of being lengthy. Concisely tell them why you're the best fit.

4. Describe the process you'll guide them through

This is the section that ranges the most for me. Depending on how specific the requirements were in the job posting, I will spend anywhere from two sentences to two paragraphs explaining the path I'll guide them down. Give them a glimpse into the process that you're going to walk them through. If you're going to elaborate on any of the sections of your proposal, I think this is where you can get away with a little bulk. Tell them the first few steps you'd go through with them.

5. Attachments


A well designed and well documented onboarding process, or example will go a long way in building your credibility. By attaching your cv or any other relevant document to your proposal, they can see that you have a structure and process to bringing on a new client, which will ease their mind about working with you. It shows them that you know what you're doing, I've done it before, and I've got a clear process that will make it easier on them. It shows a level of professionalism that puts me at the top of the pile.



10 Ways to Improve Client Communication Skills

Communication is one of the keys to building a successful business partnership with your clients.


Effective communication leads to a longer and stronger relationship with your clients and more revenue for your business. Your clients choose to work with you because they believe you can help them solve a problem. But it's important to remember that if your communication style causes new problems, you may lose that client's trust and that business relationship could come to an abrupt end. Strong client communication offers many benefits for your business:

- Provides project direction and purpose
 - Builds client trust
 - Increases understanding of the client's perspective
 - Creates accountability
 - Aligns expectations, budgets, and deliverables
 - Avoids confusion
- 

communication is crucial at every stage of a client relationship:

- When you first pitch your services, you need to align your services with their goals and sell the client on how you can help them.
- As you **prepare a project proposal** or work contract, you need to be clear about the project's deliverables, budgets, and expectations.
- Once the engagement begins, you need to keep the client informed on progress to build trust and ensure that the client is comfortable with the process.
- As you finish your first project, your communication skills will be vital to extending that relationship and continuing to work together in the future.
- Communication during long-term client relationships helps to provide direction for future projects and encourages your clients to refer others to your business.

Because communication plays such a crucial role at every step of the client journey, it's essential to improve your client communication skills. Below are ten ways to do this successfully.




1) Establish a human connection

Don't think of your client as a faceless company. Business is about people and relationships. The more you can connect with your client personally, the stronger your relationship will be. Creating a shared connection with your client will make your client feel understood and appreciated. Understanding who you're working with allows you to put yourself in their shoes and empathize with them.

You don't have to be best friends with your point of contact, but they should never dread an upcoming conversation with you. Regardless of your personality type, you can build a bond with your clients. This bond starts with being friendly, approachable, and having a positive attitude. Even on the busiest days, treat your client like their needs are a priority and give them your full attention during meetings.

Creating this human connection plays a crucial role in ensuring that you are consistently aligned with the client's goals and needs.




2) Understand your client's communication channels

Learn how your client's point of contact likes to communicate. Do they prefer a phone call, email, or face-to-face meetings? If your client hates checking their email and prefers to conduct business face-to-face, sending email updates will not be sufficient. Communication is only successful when both parties receive and understand the message. Being flexible and matching your client's preferred communication method will make it easier for them to understand your intended message. If possible, select a specific point of contact, and communication should primarily flow through them rather than have many communication streams with a client.

3) Schedule consistent communication

Set a consistent schedule for correspondence and maintain it. The frequency should reflect your client's preference, whether daily, weekly, bi-weekly, or quarterly. Having this consistent and reliable planned communication will make the client feel more comfortable that your business is taking care of their needs and not being forgotten.

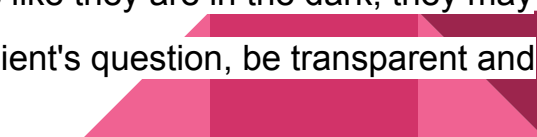


4) Respect the client's time

Time is precious, so don't make your client feel like you are wasting theirs. Show up to meetings on time. If a client calls, answer it if possible, rather than just calling them back later. If a client emails you a question, it is vital to respond to it quickly. If you cannot fully respond to an email at that moment, even a simple acknowledgment that you have seen it can be reassuring. Just make sure to follow up promptly with a full answer to their question.

5) Be transparent

Transparency is critical to successful client communication. Being clear and honest throughout your relationship makes it easier to build and keep your client's trust. Whether you are delivering good news, bad news, or no news, it is necessary to be straightforward with your clients. If your client feels like they are in the dark, they may assume the worst. If a project is delayed, or you don't know the answer to a client's question, be transparent and communicate it to the client.




6) Use a collaboration tool

The rise of online collaboration tools makes working with clients easier and faster. Giving your client access to your project management software will provide them a way to collaborate, provide feedback, and monitor project progress. **Collaboration and productivity tools** can also be paired with a CRM (customer relationship management) system to help you manage and organize internal and external communication all in one place.

7) Set expectations and boundaries


While you want to be there for your clients at all times, it isn't always realistic. Know your limitations and boundaries so that you can communicate them to your client in advance. For example, if you take a month's vacation every year and can't be reached during that time, your clients should know about it. This allows you the opportunity to set expectations in advance and to develop a game plan. Setting proper expectations will make your client feel more informed and prepared.



8) Set an agenda and send a recap

Be purposeful when it comes to meetings with clients. Set an agenda and outline what you intend to discuss. When you are meeting with a client, it's essential to understand how they best absorb information. Does the client prefer back-and-forth discussions, visual presentations, reviewing data, or short updates? Tailor your meeting plan accordingly and use your client's natural communication style so that the client is more receptive to the information.

Then, once the meeting is over, send the client a recap of your discussion. A meeting recap creates a record that can be referenced later to see what was covered, what everyone is accountable for, and any upcoming to-dos.



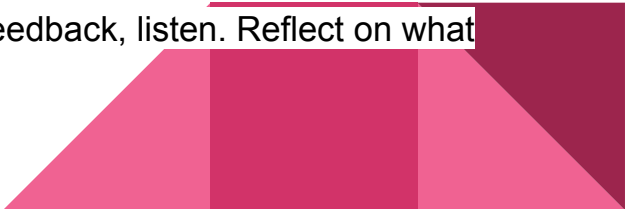
9) Ask questions as needed

Questions play an important role in communication. They help you clarify understanding and make sure that you are on the same page as your client. Plus, asking questions shows the client that you are engaged and interested in the conversation.

If you're unsure about any details for a project, don't make assumptions. Instead, ask the client. It's better to ask a lot of questions rather than waste your time delivering something the client doesn't want.

10) Ask for feedback

The best way to improve is to ask your clients for feedback. Asking your client about specific ways to be a better partner will make you a better partner. If a client takes the time to provide you feedback, listen. Reflect on what they're saying, and then try to incorporate it.



Tools needed for upwork Jobs

skype for Business: This is where your employers are mostly likely to communicate and interview you from. [Skype | Communication tool for free calls and chat](#)

Slack: is a channel-based messaging platform. With Slack, people can work together more effectively, connect all their software tools and services, and find the information they need to do their best work — all within a secure, enterprise-grade environment. This is more like a your company whatsapp group but on a higher integration level. [Create a Workspace | Slack](#)


Intercom: As a customer support person, this is one of the most important tools, you will be using to communicate with your customers. It does live chat, but there's also bots, apps, product tours, and more—like email, messages, and a help center—that help you build relationships with your customers. [Conversational Relationship Platform | Intercom](#)



GoHighLevel: is an all-in-one sales and marketing platform for marketing agencies. Here are some of its main features: 1. Sales funnel creation – **GoHighLevel** will help you build forms or landing pages and generate new leads. [GoHighLevel - It's time to take your Agency to the Next Level](#)

Clockify: Clockify is the only truly free time tracking software. It's a simple time tracker and timesheet app that lets you and your team track work hours across projects. Unlimited users, free forever. Get Started — It's Free! Track productivity, attendance, and billable hours with a simple time tracker and timesheet. Clockify works across devices. [Clockify - 100% Free Time Tracking Software](#)

Trello: The **Trello** is defined as project management tools that is used to plan the project activities or can be used to track the project activities' progress. The **Trello** tool is compatible with all types of platforms. The tool can be accessed through a computer system, mobile phones, or laptops. [Trello](#)



CRM Tools

For those of you that might need to work with some CRM tools like Zendesk, here are videos for you.

[\(142\) What is CRM? \(Customer Relationship Management\) - YouTube](#)

[\(142\) What is CRM? | A guide to CRM software by Zoho CRM - YouTube](#)

[\(142\) Zendesk product demo - YouTube](#)



Quiz

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