

# Virtual Video Sessions Workflow

**Content Type:** Internal KB

**Category:** Procedures

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## Background

We are always looking for ways to improve the experience of our Members. With virtual video sessions, we can address Member issues faster by walking them through the steps to resolve various issues and help them resume their workouts as soon as possible.

## Roles & Responsibilities

<b>Toronto Team</b>	Scheduling and conducting virtual video sessions with the Members
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## Tools Needed

- SFDC
- Amazon Connect
- Google Calendar: *Virtual Help Session*
- Zoom

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## Setting Up a Virtual Video Session with the Member

Once we have identified a case where a virtual video session will help us provide the Member with the best troubleshooting experience, follow these steps:

1. Open the case in SFDC.
2. Perform an outbound call to the Member and let them know you would like to schedule a virtual video session. Make sure you follow the [outbound policy](#).
3. Inform them of the virtual video session requirements:
  - Their video must be on and facing the trainer so we can verify each step.

- They need Wifi access and their Tonal account information so they can log in.
  - Their session will be recorded for quality assurance purposes. You can use the language from the **Macro:** [Initial Outreach for Virtual Session](#).
4. If the Member wants to do a virtual video session, update the following fields for the case in SFDC using the values in the table:

**Note:** This will only be done for virtual video sessions.


Field	Value
<b>Scheduled Install Date</b>	Populate with the date of the scheduled virtual video session.
<b>Related Jira (Backup)</b> <b>Note:</b> There are three <i>Related Jira (Backup)</i> fields. Use the last one.	Populate with the Zoom link for the virtual video session.

Product Information

Order ID


Device ID

SFDC Order

Search Orders... 


Serial Number

Purchase Date




Related Jira (Default)

Scheduled Install Date

11/15/2021 

Related Jira (Backup)

Related Jira (Backup)

https://tonal.zoom.us/j/98614121304 

- If you are unable to reach the Member:
  1. Send an email using the **Macro:** [Initial Outreach for Virtual Session](#).
  2. Update the case notes.

- If you spoke with the Member and they want to do the virtual video session right away:
  1. [Update the Virtual Help Session calendar](#) and send the invite to the Member.
  2. At the time of the virtual video session, follow the steps for [Running a Virtual Video Session](#).
- If you spoke with the Member and have confirmed a virtual video session for a later date:
  - Confirm the virtual session by sending an email to the Member using the **Macro:** [Virtual Session Appointment Confirmation](#).

**Remember:** Add the date and time of the virtual video session to the macro before sending it. Here's where you can enter it:

The screenshot shows the Tonal Care email composition window. The header includes the Tonal Care logo, a 'Cases' dropdown, and a case ID '00637653'. The email is addressed to 'Katie Hargis' and is from 'Support <support@tonal.com>'. The Bcc field contains 'megha@tonal.com'. The subject line is 'Enter Subject...'. The email body contains the following text:

Hi Katie,

This email confirms your virtual troubleshooting session for 11/15/2021 at 12pm PST. Please use this link to enter the virtual session: <https://tonal.zoom.us/j/98614121304>

Here are some points to keep in mind before your appointment:

1. We will need a stable WiFi connection throughout the session to make sure we can communicate clearly while performing the troubleshooting steps.
2. Please keep any Tonal logins needed accessible for the session! We want to make sure you're all set so we can help resolve your issue in a timely manner. Our team will never ask for your login details.

The email body text is enclosed in a red rectangular box. At the bottom right of the email body, there are 'Saved' and 'Send' buttons.

5. Add case notes using the **Quick Text:** [Virtual Session Appointment Fixed](#).
6. [Update the Virtual Help Session calendar](#) and send the invite to the Member.
7. At the time of the virtual video session, follow the steps for [Running a Virtual Video Session](#).

**This workflow is complete!**

## Updating the Virtual Help Session Calendar

1. Open Google Calendar.
2. Click on the date and time block for the scheduled virtual video session.
3. Give the event a title. Please use “VTS session for” and the type of issue, for example, “VTS session for Apple Music”.

VTS Session for Testing Purposes

Event Focus time Out of office Task Reminder Appointment slots

Tuesday, March 22 10:00am – 11:00am  
Time zone · Does not repeat

[Find a time](#)

Add guests

Add video conferencing

Add rooms or location

Add description or attachments

Ken Pink ●  
Busy · Default visibility · Notify 10 minutes before

Availability might be shown in other Google apps ?

More options Save

4. Click **Add Video Conferencing** to add a Zoom meeting link.

## VTs Session for Testing Purposes

Event

Focus time

Out of office

Task

Reminder

Appointment slots

Tuesday, March 22 10:00am – 11:00am  
Time zone · Does not repeat

Find a time

Add guests

Add video conferencing

Add rooms or location

Add description or attachments

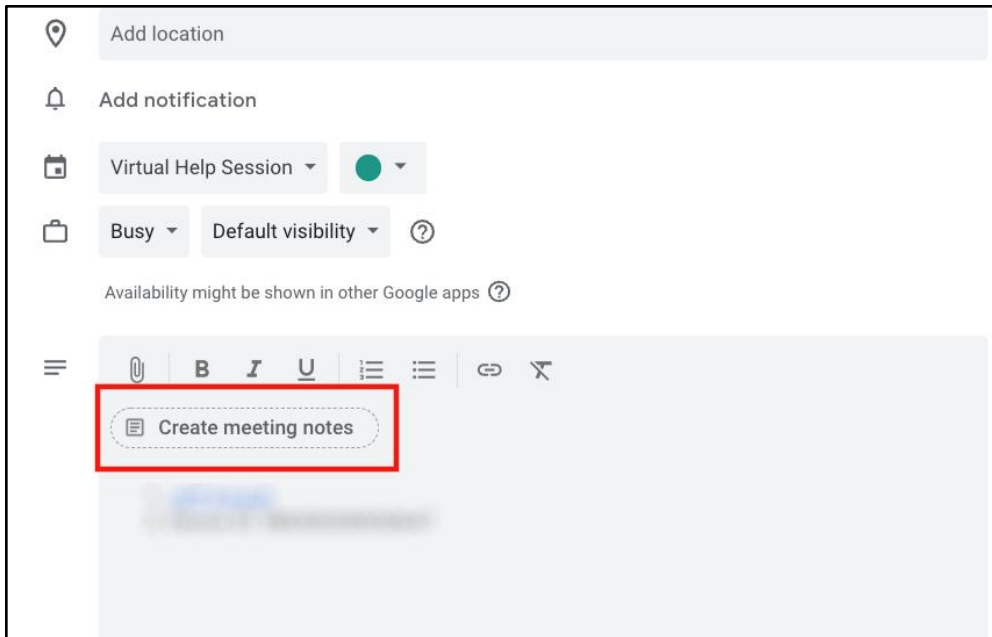
Ken Pink ●  
Busy · Default visibility · Notify 10 minutes before

Availability might be shown in other Google apps ?

More options

Save

5. Click **Add Description or Attachments** and add the following:
- a. The Member's name with a link to their Person Account page in SFDC.
  - b. The case number.
  - c. The Device ID for the trainer being serviced.



The screenshot shows a meeting creation interface. At the top, there are four rows of controls: a location field with a location pin icon and the text 'Add location'; a notification field with a bell icon and the text 'Add notification'; a session type field with a calendar icon, a dropdown menu showing 'Virtual Help Session', and a green status indicator; and a status field with a briefcase icon, a dropdown menu showing 'Busy', a 'Default visibility' dropdown, and a help icon. Below these is a note: 'Availability might be shown in other Google apps' with a help icon. The main editing area has a menu icon on the left and a toolbar with icons for attachments, bold, italic, underline, bulleted list, numbered list, link, and unlink. A red rectangular box highlights a button with a notepad icon and the text 'Create meeting notes'.

6. Click on the dropdown menu button beside your name and select the “Virtual Help Session” calendar.

**Note:** This adds the event to the shared Virtual Help Session calendar. If the event is only on your calendar, no one else will be able to see it. We want everyone to be able to see when virtual video sessions are scheduled.

Event Focus time Out of office Task Reminder Appointment slots

Wednesday, February 23 1:30pm – 2:30pm  
Time zone · Does not repeat

[Find a time](#)

Add guests

Add video conferencing

Add rooms or location

Add description or attachments

Ken Pink

Virtual Help Session

Default visibility ?

10 minutes before

Add notification

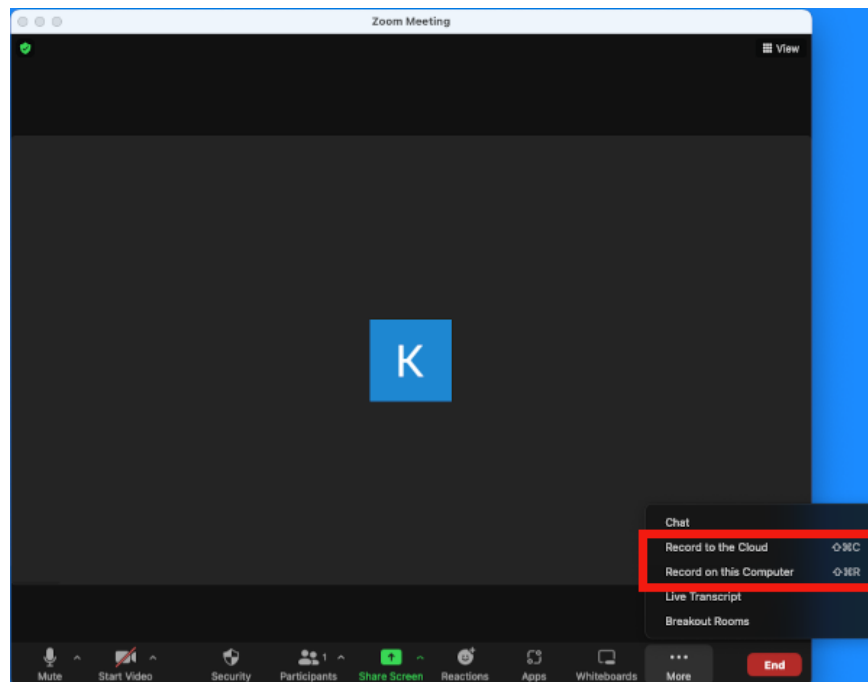
Availability might be shown in other Google apps ?

More options Save

**This workflow is now complete!**

## Running a Virtual Video Session

1. Log in to the Zoom video 5 minutes before the scheduled time.
2. Ensure your video and microphone are working.
3. Remember to:
  - Apply a Tonal virtual background to your Zoom video ([see recommendations](#)).
  - Wear a Tonal branded t-shirt.
4. When the Member joins the Zoom meeting, greet them and remind them that the session will be recorded. Manually start recording.



5. Request the Member to focus their camera on the trainer.
  6. Guide them through the necessary steps to resolve their issue.
  7. If applicable, do a test to confirm that the issue has been resolved.
  8. End the Zoom call.
  9. After the Zoom call, Zoom will process the call recording. Copy and paste this recording as an attachment to the SFDC case.
- If the issue was resolved
    - Update the **Case Origin** field to **Virtual Session**.



- Send an email using the **Macro:** [Virtual Session: Follow Up](#).
- Update the **Resolution Category** to **Troubleshooting Resolved**.
- Add case notes using **Quick Text:** [Issue resolved with Virtual Session](#).
- If the issue was not resolved
  - Update the **Case Origin** field to **Virtual Session**.
  - Send an email using the **Macro:** [Virtual Session Follow-up: Issue not resolved](#).
  - Update the case notes.

**The workflow is completed!**

#### **Additional Resources**

<b>Macro</b>	<a href="#">Virtual Troubleshooting Initial Outreach</a>
<b>Macro</b>	<a href="#">Virtual Video Session Appointment Confirmation</a>
<b>Quick Text</b>	<a href="#">Virtual Session Appointment Fixed</a>
<b>Macro</b>	<a href="#">Virtual Video Session Follow-up: Issue Resolved</a>
<b>Quick Text</b>	<a href="#">Virtual Video Session: Issue Resolved</a>
<b>Macro</b>	<a href="#">Virtual Video Session Follow-up: Issue Not Resolved</a>