

TRAINERS NOTES

Session Title: Back Office Induction Classroom Notes		Length of course: 5 Days (Full time hours 9.00 – 16:30)
Trainers Notes		
Day 1	Introduction Context Setting Agenda for the day Objectives	<ul style="list-style-type: none"> ❖ Introduce Session, Domestic ❖ “Big Picture” ❖ Agenda ❖ Cover course aim ❖ Personal Objectives
Day 1	<p>Welcome to Extra Energy</p>	<p>Display Welcome to Extra Energy Slides, go through slides up to and including the Agenda</p> <p>Say: Good Morning congratulations on your new roles, it is an exciting time to join our Company as we are expanding rapidly. The Induction is made up of several different modules which ensure when you leave training you have the additional knowledge and skills to your own experience to provide excellent Customer Service to our customers. Before we start I will take you around the building so you know where the fire assembly point is where the toilets are etc.</p> <p>Take learner’s on tour of the building this shouldn’t take longer than 15 minutes</p> <p>Say: We are going to go through all the paperwork that you need to complete to enable us to process your contracts and ensure you get paid. I will take you through the Company history and structure. We will also go through Data Protection Act standards as this is a legal requirement. We will also cover Equality and Diversity and Health and Safety.</p> <p>Explain: In front of you there are workbooks and some other paperwork, can you select the joiners pack and complete this fully, including the P46 unless you are giving me your P45 today.</p> <p>Let the learner’s complete paperwork.</p> <p>Carry on with Extra Energy Slides up to slide any questions, talk through fire regulations, getting paid, holidays and shift patterns</p>

Trainers Notes

Day 1

Module 1

Welcome to Extra Energy

Say: As with any business you are expected to attend work every contracted day unless you are sick, the process for calling in sick, is to call an hour before your shift start time or as close to as possible. Take out your mobile phones and add into your contacts the numbers on the slides. You need to be aware that if you do not follow the correct procedure for calling in sick, you will be classed as AWOL. You would also need to contact these numbers if you are going to be late for your shift, on time means logged on and ready to work at your start time, not running through the door.

Say: Monday – Thursday our dress code is business dress, that means no jeans, leggings or sportswear. On a Friday and Saturday the dress code is business casual. Think of that as jeans and trainers as you must still look smart.

Continue with slides up to any questions so far.

Ask staff to complete the ISO workbook as required by Teleperformance then mark the answers and record the scores on the assessment spreadsheet

Day 1

Welcome to Extra Energy

Workbook, Page

Talk through Brand Recognition Slide

Say: Our Vision is to be the envy of every energy retailer in the way we manage our customers, employees and business. What does this actually mean?

Response: That we provide excellent customer service, to all who we do business with whether this is a customer, a business contact or an employee. Our prices will be consistently low, so we will compete on price as well as service.

Say: Our Mission is to create the “Big 7” in five years whilst leading with exceptional value and customer services.

Ask: What’s the difference between the Vision and Mission?

Response: Our Vision is what we want to achieve and sustain long term our Mission is more specific of how we will get there

Explain: All companies have a Vision, mission and values and we are no different, we have values which we expect our staff to work by, to ensure that we can achieve our Mission and Vision.

Talk through the Values.

Trainers Notes		
Day 1	Welcome to Extra Energy	<p>Say: Extra Energie was founded in Germany in 2008, in 2009 electricity was supplied nationwide, halfway through 2010 the Gas supply was introduced nationwide. Then in quarter 4 business to business supply was entered into. In Quarter 4 of 2011 Business to business had Combined Heat Production Management started. Then in 2013 the UK market was entered. As you can see at the bottom of the timeline several other companies have been introduced.</p> <ul style="list-style-type: none"> ❖ ExtraEnergie is the fastest growing energy provider in the German market ever. ❖ ExtraEnergie had a market share of 15% of all domestic changing customers in Q4 2010 and is at a level of 18% since the beginning of 2011. ❖ Out of 1,100 energy suppliers in the German market ExtraEnergie is among the top 10 in number of private customers, and is expected to be among the top 3 within the next 12 month. ❖ ExtraEnergie is highly efficient and lean structured. Despite its rapid growth, ExtraEnergie is still considered to be the „leanest“ in the market with headcount of about 500 people, mainly in customer care and sales support centers. ❖ ExtraEnergie has the lowest customer churn rate in the market of 14.1% while the market average is above 28%. <p>Talk through slides about the company and the management team and structure.</p>
Day 1	Health and Safety	Run Health and Safety PowerPoint
Day 1 Module 2	Equality and Diversity	<p>Display Equality and Diversity PowerPoint</p> <p>Activity split learners into two groups one to do Equality one to do Diversity, now ask them to plot their information onto the Iceberg. This is to show about visible differences and invisible differences.</p> <p>Prepared Flipchart D = different, I = Individuals, V = valuing, E= each other, R = Regardless of, S = Skin, I = Intellect, T=Talent or, Y=years.</p> <p>Activity – Statement about Prejudice and Discrimination (Prejudice broadly describes negative feelings and attitudes people have about others that have no rational basis. Discrimination generally describes actions people take on their prejudices)</p> <p>Talk through remainder of power point to ensure, victimisation and harassment are covered.</p>

Day 1 Module 4	Standards of Conduct	<p>Explain that as a responsible energy company, we have licence conditions that we have to adhere to and one of those is SLC25, which is to ensure that we treat our customer, Fair, honest, transparent, appropriate and professional.</p> <p>Activity In Groups get learners to answer this question “how can we ensure we treat our customers “Fair, honest, transparent, appropriate and professional.</p>
Trainers Notes		
Day 2	<p>Industry Overview</p> <p>Everyone knows something about energy, the industry or the companies involved with it.</p>	<p>Activity – What do you know? Split learners into groups, what do you already know about the industry think about what is in the media, personal experience. (10 minutes)</p> <p>There are lots of suppliers in the market firstly the big six, but also several smaller suppliers. Every supplier is our competitor.</p> <p>Where does Electricity come from? In the UK, our electricity is generated in a number of different ways. It is important to have different fuel sources and technologies to generate electricity so that we have a constant supply and are not overly reliant on one type of power generation. Most of the UK’S electricity is produced by burning fossil fuels.</p> <p>Electricity is made by fast spinning rotation of generators, copper coil, and magnets.</p> <p>First the coal is ground to a fine powder and blown into the boiler, where it is burned, converting its chemical energy into heat energy. Grinding the coal into powder increases its surface area, which helps it to burn faster and hotter, producing as much heat and as little waste as possible.</p> <p>As well as heat, burning coal produces ash and exhaust gases. The ash falls to the bottom of the boiler and is removed by the ash systems. It is usually then sold to the building industry and used as an ingredient in various building materials, like concrete.</p> <p>The gases enter the exhaust stack, which contains equipment that filters out any dust and ash, before venting into the atmosphere. The exhaust stacks of coal power stations are built tall so that the exhaust plume can disperse before it touches the ground. This ensures that it does not affect the quality of the air around the station.</p> <p>Burning the coal heats water in pipes coiled around the boiler, turning it into steam. The hot steam expands in the pipes, so when it emerges it is under high pressure. The pressure drives the steam over the blades of the steam turbine, causing it to spin, converting the heat energy released in the boiler into mechanical energy.</p>

Trainers Notes

A shaft connects the steam turbine to the turbine generator, so when the turbine spins, so does the generator. The generator uses an electromagnetic field to convert this mechanical energy into electrical energy.

After passing through the turbine, the steam comes into contact with pipes full of cold water. In coastal stations this water is pumped straight from the sea. The cold pipes cool the steam so that it condenses back into water. It is then piped back to the boiler, where it can be heated up again, turn into steam again, and keep the turbine turning.

Finally, a transformer converts the electrical energy from the generator to a high voltage. The national grid uses high voltages to transmit electricity efficiently through the power lines to the homes and businesses that need it. Here, other transformers reduce the voltage back down to a usable level.

Electricity

Generation --- Supplier --- Consumer
Power plant (connection use of system code)
Transmission Network
Distribution Network (DCUSA – Distribution
Connection Use of system code this governs who
can distribute electricity)
Overseen by Master Registration Agreement
Metering
Customers

Where does gas come from?

Britain now gets its gas from a wide range of sources to make sure we always have the supply the country needs.

These include:

- ❖ North and Irish Sea production.
- ❖ Pipelines from continental Europe and Norway.
- ❖ Liquefied Natural Gas (LNG) shipped in from around the world.

Gas from fields in the North and Irish Sea typically provide around 40% of gas supplies. However production from these fields is now in decline and we are importing more and more of our gas from abroad.

Trainers Notes

Day 2

Industry Overview

Gas comes from deep underground to release this gas we have to drill down into the earth once its released it is transported via the UK transportation network.

Gas

Gas Production – Shipper – Supplier – Consumer

Gas Extraction

Port Terminal

Transmission Network

Distribution Network

Customers

Explain:

The cables / pipes are the responsibility of the distributor / transporter (National Grid) the meters are our responsibility, inside the house the wires and pipes are the responsibility of the property owner.

Explain: Up until 1990s people were supplied for their gas by British Gas and for their electricity they were supplied by their public electricity supplier (PES), in the West Midlands this was MEB.

In the late 1990's it was decided to introduce competition in the electricity market to help give customers choice in who supplied their electricity it also meant that prices were driven down. All the local electricity suppliers could now provide power out their "home" area.

To support this change in how customers are supplied the country's 14 public electricity supply areas where changed to distribution areas and referred to by a two digit code called a PES or distributor ID. All customers in that supply area would have this two digit number associated with their property. All homes in the West Midlands are under code 14. This would then help with pricing and power outages.

Because of the industry changing, new processes had to be put in place to support and protect customers when switching supplier. Each property was then allocated with a Meter Point Administration Number, this would be the address of the Supply Point and be a unique 13 digit number, and the first two digits would be the PES ID.

Each distributor had the responsibility of keeping an up to date record of which supplier supplied which property in their area, and also to keep information on what metering equipment is kept on site. This department of the distributor for each area is called MPAS (meter point administration service), all distributors then feed this information into a central database called ECOES).

Trainers Notes

Day 2

Industry Overview
Prepared Flipchart

Explain: For electricity the Meter Point Administration Number makes up part of another set of numbers referred to as the supply number.

Activity – Put together your supply number. (Flipchart)

Profile Class – The load capacity of the meter
Meter Time switch Code – if the meter is E7 and code will inform you if a related meter if between 500 – 799.
Line Loss Factor – The Power lost in transition to supply point
MPAN – Meter Point Administration Number



As well as an MPAN, a customer will have a Meter Serial Number which is a unique number especially for their meter, this will be printed on their meter.

A customer will also have an EAC – Estimated Annual Consumption, this is specific to a customer in the property they occupy, and helps us to predict their usage over the course of 12 months. This will help us forecast electricity to buy how much a customer's direct debit will be. A customer will find this on their latest electricity bill.

Day 2

Gas

Gas works slightly differently to electricity.

The gas industry followed the electricity in 1998 with electricity companys being able to supply gas to if they had a supply licence.

The country was broken down into 12 Local Distribution Zones which are managed by 8 companies.

To assist with locating each gas supply they were given a unique identifier for the supply point. This is known as a Meter Point Reference Number. This is normally 10 digits long. Instead of MPAS looking after each area

AQ – Annual Quantity, works the same as Electricity's EAC

Module Overview – Week One

Independent Gas Transporter

Most customers are on the main grid for gas, but a few customers (under a million) are supplied by an Independent Gas Transporter. These are usually found in new house builds where it is easier for a developer to use an IGT to supply the site.

- ❖ If the MPRN shown begins with 74 or 75, 76, 77 then this customer is supplied by an Independent Gas Transporter.
- ❖ Customers pay an additional charge for this because the gas supplier must pay both Transco and the Independent Gas Transporter to deliver gas through the pipes to your home.

Day 2

Industry Agents

Explain as the supplier we hold a contract with the customer and as we covered earlier we are responsible for billing the customer and providing customer service.

Activity – Match the name of the Agent and their responsibility

Gas	Electricity
<p>Meter Reading Agent – Reads the Gas Meter</p> <p>Meter Asset Manager – Responsible for Installation, Replacement and maintenance of gas meter.</p> <p>Meter Asset Provider – Owns the Meter</p>	<p>Data Retriever – Reads the Electricity Meter</p> <p>Data Collector – Collates all the data and communicates with the supplier via dataflow</p> <p>Data Aggregator – calculates Estimated Annual Consumption and validates all meter readings</p> <p>Meter Operator – Responsible for Installation, Replacement and maintenance of electricity meter.</p>

Trainers Notes		
Day 2 PM	Other parties	<p>Response: to revoke our licence to supply gas and electricity – which would result in all of us being out of work.</p> <p>Explain: their purpose is to protect consumers, protect competition and regulate monopoly companies – as well as ensuring adequate investment on the network. They do not deal with complaints that is the role of the energy ombudsman.</p> <p>The Ombudsman are an impartial firm who look into complaints on behalf of consumers. For every complaint that the Ombudsman receive and uphold about an energy company that company pays a fee. There are several other parties who can assist energy consumers</p> <ul style="list-style-type: none"> • Consumer Futures • Citizens Advice Bureau • National Debt line • Business Debt line
Day 3	Customer Journey	<p>Explain: We supply three types of customer a Small Medium Enterprise (upto 250 employees) turnover less than 50 million euros, Domestic and Micro Business (upto 10 employees), turnover of less than 2 million euros.</p> <p>Activity – With the knowledge you already have of the industry, what is the switching process?</p> <p>Customer signs Contract 14 day cooling off period (unless SME) Request supply Objection period closes Appoint Agents Confirmation of Appointments Supply goes live</p> <p>How long does switching take? 28 days for electricity, 30 days for gas.</p> <p>Objections – Why can a current supplier object?</p> <ul style="list-style-type: none"> ❖ Debt on a customer's account ❖ Customer raised objection ❖ Fixed Term Contract

Trainers Notes

Gains Dataflows Electricity

Explain: The electricity industry communicates through electronic dataflows, this allows bulks of information to be passed from supplier to supplier in a short space of time.

Explain: On Day 15 for domestic customers or day 2 for SME customers we contact MPAS asking to take the customers supply, we also ask to appoint meter reading agents and meter operators we do this by sending a dataflow this dataflow is called an AREGI.

We then receive response dataflows saying yes to us taking supply, we may also receive details with any problem we need to fix before taking supply.. the response dataflows are called an S0004 – we will go into more detail with these dataflows later on.

Once the agents have accepted the contract with us to support this property, we then receive a dataflow with all the meter technical information on it. This is called an S0015.

Once we have the meter technical information we then can obtain meter readings to do this we employ a meter reading agent we know when they are going out based on a walk order or meter reading schedule date this comes to us via a D0012 dataflow.

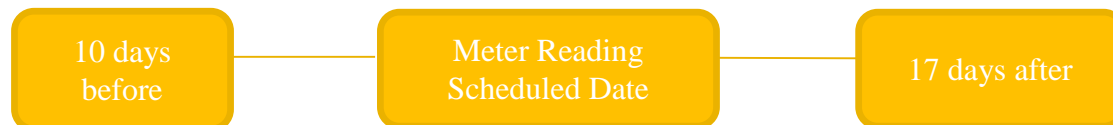
We ask the customer to provide us with a meter reading 5 days before supply start date or 5 days after supply start date once we receive this we send it out on a dataflow called an S0003.

Trainers Notes		
	Gains Dataflows Electricity	<p>Explain: MPAS validate this reading for us and send this back as a D10 dataflow.</p> <p>We will then also receive this reading on a change of supply dataflow called a D86, this will then be used to open the customer's account.</p> <p>We then receive the CREGI as confirmation of registration.</p> <p>Finally we expect to receive a D19 which tells us the Estimated Annual Consumption, this is what MPAS expects the customer to use within the next 12 months based on what they have used before.</p> <p>Give the learners some time to take notes and reflect on the information given</p>
	S0004 – Response Flow	<p>Explain: We are now going to look in more detail at one dataflow in particular the S0004.</p> <p>Im going to split you into pairs and handout paper copies of a real S0004, this is to help you get used to looking at this dataflow so that you gain confidence locating the statuses and recognising any errors.</p> <p>Run Exercise – S0004 Recognising Rejections and Objections</p> <p>Activity - Refer learners to the rejection statuses in their workbooks and ask them to present back as a group their understanding of these statuses in a format of their choice</p>
	<i>Gains Dataflow Gas</i>	<p>Explain: Like the electricity industry the gas industry communicates through electronic dataflows, this allows bulks of information to be passed from supplier to supplier in a short space of time. However the flows have different names in gas, you will find with experience that gas flows take longer to come through to us.</p> <p>Explain: On Day 15 for domestic customers or day 2 for SME customers we contact XOSERVE asking to take the customers supply, we also ask to appoint meter operators we do this by sending a dataflow this dataflow is called an AREGI.</p> <p>We then receive response dataflows saying yes to us taking supply, we may also receive details with any problem we need to fix before taking supply. The response dataflows are called an UT004 – we will go into more detail with these dataflows later on.</p>

Trainers Notes		
Day 3 am	Credit Checks	<p>Why are we performing a credit check?</p> <p>All contracts offered to our customers are subject to a credit check and we carefully follow Ofgem guidelines when we receive information about the customer's ability to pay for products and services.</p> <ul style="list-style-type: none"> ❖ The process confirms to Extra Energy that the customer is identified as who they say they are and lives at the property they are hoping to switch to Extra Energy. ❖ Customers that fail a credit check can still become customers of Extra Energy. We will take a deposit from them prior to them coming onto supply. ❖ Deposits will be 50% of the EAC for the customer. As a result there is not a set figure for the amount each person will need to pay to come onto supply. ❖ We decided on the 50% figure using guidelines provided by Ofgem and the Citizens' Advice Bureau. <p>Why does the customer need to pay a deposit?</p> <ul style="list-style-type: none"> ❖ In some situations, we might insist that the customer has to put down a deposit before agreeing to supply them with gas or electricity. ❖ This might apply if they are a new customer and cannot provide proof of their identity, or if they have a poor credit history. ❖ We will review deposits after one year. If the bills have been paid in full, the deposit will be returned within two months of the end of the year.
Day 3 PM	Metering Workbook page	<p>When taking customer calls there will be a time when you have to talk a customer through reading their meter, the purpose of the next activity is to get you looking at different types of meter.</p> <p>Activity (meters displayed around the room) - Go be a meter reader, I want serial number, if it's a gas or electricity meter, if its standard or prepayment and what the reading is, if you can't see the reading how would you get the reading displayed. (answers in Trainer workbook).</p> <p>Related Meters: Two MPANs, with 1 meter attached to each MPAN. One meter will register one rate of electricity and the other meter will register electricity used at a different tariff rate. You can tell if a meter is related as it will show in the MTC code within the supply number.</p> <p>Submitting a meter reading (we will do this within Account Plus when we do system training)</p>

Trainers Notes		
	Billing	<p>Extra Energy is a business that needs to ensure that it runs its accounts accurately and that all services provided are paid for in a timely manner.</p> <p>When a customer comes onto supply with us, from the supply start date we are providing them with gas and or electricity on demand, we are also paying Lowri Beck for any services they will provide on our behalf such as gaining meter readings, or if there is a problem with the metering equipment. Therefore when we bill the customer we need to ensure it is as accurate as possible so that the customer is happy with the amount so they will pay but also so that our settlements process is smooth.</p>
	Settlements	<p>Ask: Do you know what I mean by the settlements process?</p> <p>If someone can explain this – brilliant if not see below May need to write this on flipchart or whiteboard to highlight point</p> <p>Explain: The settlement process settles discrepancies, for each half hour trading period, between:</p> <ul style="list-style-type: none"> ❖ The amount of electricity that a company has contracted to generate or consumer (adjusted for any accepted Bids and Offers in the Balancing Mechanism); and ❖ The amount of electricity which the company actually generated or consumed <p>Ask: How can we possibly know what has been consumed?</p> <p>Prompt: What do we ask customers to provide us with?</p> <p>Expected Response: Meter Readings</p> <p>Explain: Accurate meter readings are extremely important to our business to ensure the accurate settling of what has been bought and sold, this process is governed by a company called BSc Elexon. Therefore any big difference between purchase and usage is watched by Elexon if we have too many they can clamp down and fine us. So it is in our best interest to manage meter readings on accounts to ensure there are no gaps between what we have contracted to generate what has been used.</p> <p>This is why smart meters will help our business greatly as they will take meter readings every half hour remotely from the meter with as long as we have the customers express permission.</p>

Trainers Notes		
	EAC / AQ	<p>Ask: <i>So how do we know what to buy?</i></p> <p>Expected Response: <i>Estimated Annual Consumption, Annualised Advance and Annual Quantity</i></p>
	<i>EAC / AQ Purchasing</i>	<p>Ask: <i>What is this?</i></p> <p>Expected Response: This is a calculation for the next 12 monthly period based on what the customer has used in the last 12 months for that particular supply point (property).</p> <p>Explain: The EAC is calculated on our behalf by the Data Aggregator (Lowry Beck), this is sent to us on a D19 flow after every meter reading is submitted by us from the customer or from the meter reader, therefore the most recent D19 in Account Plus. The gas is only updated once a year by XOSERVE, you will find this in the CREGL.</p> <p>Purchasing in Extra Energy is completed by our Purchasing Team, within that team they will use the EAC / AQ for all of our customers. For electricity we buy in half hourly periods for gas we can purchase and store well in advance. However we need to estimate the best we can to ensure that we don't lose money, as gas and electricity is volatile the price goes up and down. We would not want to buy at a peak price and then be unable to sell it on. Later in the journey our Settlements Team would analyse what we contracted to generate or buy based on our EAC's / AQ's and based on meter readings what we sold on. Here is where there can be gaps of difference, they are known in the industry as settlement gaps. The bottom-line is if there are gaps we lose money. If there are gaps all the time and flags exceptions to Elexon they will investigate.</p> <p>So to link it to your role on a day to day basis, if the customer's bill is incorrect it will affect our bottom-line.</p>

Trainers Notes		
	<p>Once on Supply What we need to produce an invoice</p>	<p>No customer can be billed until 42 days after the supply start date has passed, therefore if the customers meter reading schedule date falls within that time, the customer will not receive a statement / bill until the next billing window.</p> <div data-bbox="792 312 1901 437">  <pre> graph LR A[10 days before] --- B[Meter Reading Scheduled Date] B --- C[17 days after] </pre> </div> <p>The meter reading schedule date has 10 days before and 17 days after (a total of 27 days) for an actual meter reading to be provided. This can be by the meter reader or from the customer. The bill is then produced to an accurate meter reading. If no meter reading is provided within this time period the reading is estimated and the bill is produced.</p> <p>If we have to use a reading estimate to bill this is created by the system based on the customer Estimated Annual Consumption for electricity and Annual Quantity for gas.</p> <p><i>Add in consolidation activity of choice</i></p>
	<p>Once on Supply The Billing Cycle</p>	<p>Once the customer is on supply and using gas and electricity we need to bill them for what they have used. Dependant on the contract the customer has agreed to will depend on how frequently we will bill them. Domestic customers are billed 6 monthly SME customers are billed either monthly or quarterly dependant on their contract.</p> <p><i>Using whiteboard / flipchart run through Meter Reading Schedule date examples to work out when bills are due</i></p> <p>Talk through bill cycle, MRSD, Invoice produced, checked by billing if any errors picked up by the system, then DD payment collected if SME.</p> <p>This will continue for however long the customer remains supplied by extra energy. However customers do move suppliers or even move house which will end their contract with us.</p>

Trainers Notes

Exceptions

Activity - In pairs from your experience can you name some of those reasons

Incorrect Start Reading
 Incorrect Bill to Reading
 Customer got it wrong
 Routine Reader got it wrong
 Customer or Customer Service Advisor added check digits - this then triggered system to alter dials for billing
 Change of Tenancy
 High Value Amount
 Meter Exchange
 No Consumption
 Incorrect Final Reading

Activity – In pairs from your experience how would you rectify the error so that we can release an accurate bill

Incorrect Start Read – Raise to disputed readings – delete incorrect bill
 Incorrect bill to reading – Cancel Invoice – Produce replacement
 Customer got it wrong – Cancel Invoice – Produce replacement
 Routine reader got it wrong – Cancel Invoice – Produce replacement
 Customer or customer service advisor added check digits

Trainers Notes		
Day	Payments	<p>Explain: As a business we need to collect money for the energy we have supplied to ensure that we balance what we buy and what we sell accurately. We offer Monthly Direct Debit to our Domestic customers and Variable Quarterly direct debit to our business customers. SME will receive the bill then if they pay by direct debit the money will be debited 14 days following the invoice date. If they do not pay by direct debit the payment is due 14 days following the invoice date.</p> <p>Domestic customers either pay by fixed monthly direct debit or on receipt of the bill. Meaning the customers due date is 14 days following the invoice date for receipt of bill.</p> <p>Customers will have their DD recalculated around the 6 month anniversary of the account, this is to check they are not overpaying or underpaying.</p> <p>Ask: What if a DD is returned?</p> <p>Response: Unpaid incorrect bank details, stopped at the customer's request, letter will be sent to the customer advising of ROB pricing and that they will be moved due to DD failure. 1st time fails we do not charge the customer. 2nd failure incurs a charge of £25.</p> <p>Ask: How is the DD Calculated?</p> <p>Response: EAC / AQ</p> <p>Explain: During a reassessment of Direct Debit we may find that the customer is in credit to us. If this is the case there are two possible options for us to take:</p> <p>Less than £70 credit – no refund will be provided but the Direct Debit will take the credit into consideration when the reassessment of the amount takes place. The customer can request a refund of this amount if they do want this option.</p> <p>More than £70 credit – refund will be provided to the customer and the account balance is brought back to £0. The reassessment doesn't take any credit into account.</p>

Trainers Notes

Day

Telephone Communications

Explain: We are going to go through a communication module, this is to use the knowledge and experience you all have already and expanding on it where needed, or you may find it is a refresher of information you have covered with previous employers.

Explain: we all create an image of ourselves by choice or ignorance, As a company we have an image to portray. Image behaviour and an excellent standard of performance should create an impression that will tell people that they are dealing with a professional company.

You have heard that saying “birds of a feather flock together”, people like people who are like themselves.

Therefore when talking to customers it is essential to build rapport with them.

Ask: What would be the benefits to you, the benefits to extra energy and the benefits to the customer of building rapport?

Benefits to you	Benefits to extra energy	Benefits to the customer
Get the details of the query from the customer easily	Customer Satisfaction is high	Feel as though they are being listened to
Is a pleasant call	Happy staff	Do not feel like a number
Job satisfaction	Customer retention is high	No stress
	Word of mouth advertising increases	Peace of mind
	Customer portfolio grows	Query dealt with quickly and effectively

How do we develop customer relationships?

By being open and honest, we are using the phone or email and therefore must make sure the tone and the words we use are appropriate to convey the right message.

What tools do we have available?

Words, tone, listening skills, assertive, experience of dealing with customers.

Trainers Notes

Day

Telephone Communications

When talking face to face to someone how you communicate is split into 3, Non-verbal (body language, facial expression), Tone and words used

Body language 55%

38 % tone of Voice

7% words we use

When talking face to face		When on the phone
Body Language	55%	n/a
Tone of Voice	38%	93%
Words we use	7%	7%

So when communicating with customers we can use positive language rather than what is perceived as negative language take five minutes to adapt the words on page 35 of your workbook for more positive words.

Activity – listening skills – run activity of choice

Activity – Open / Closed Questions – put learners into pairs and hand each person a picture, explain to them that there will be two rounds to this, they are to only asked closed questions to find out what the picture is of. Round 2 mix up pictures, now explain that open questions can be asked to determine what the picture is remember to use What, When, Where, Why, Who and How.

Discuss the benefits of each type of questions.

Trainers Notes		
Day	Assertive / Aggressive / Passive	<p>Explain: When talking to customers it is helpful to be aware of your natural style.</p> <p>Draw on flipchart or white board a triangle with a description of each style</p> <p>Ask: Are you a naturally assertive person?</p> <p>Activity – hand-out assertiveness quiz. Say: don't ponder too long take your first reaction to the question. (10 minutes)</p> <p>Ask: How can you be more assertive if it is possible? Discuss ways to improve Assertiveness</p> <p>Activity – Person to sit on chair, they can only move off the chair if the person asking is being assertive rather than passive or aggressive.</p>
Day	Power of Communication	Activity - Ask the learners in groups to define Excellent Customer Service and Bad Customer
Day 6	System Navigation - Account Plus	<p>Hand-out the Account Plus workbook, explain to the group you will show them how to download Account Plus and then you want them to do the same.</p> <p>Demonstrate how to download and install Account Plus, facilitate learners to do the same.</p> <p>Demonstrate how to search for an account, ask all learners to search for an account. (Take from data sheet)</p>
	System Navigation - Ecoes	❖
	System Navigation - Complaints	❖

	Defects / Account Fix	<p>Trainer to talk group through what a defect is and what an Account Fix is</p> <p>A defect is – When the system is doing something different to what has been specified. Example. We have given EG factory a BRS and the system does something different or doesn't do it at all.</p> <p>An Account fix – This is when we need long term development and as a solution EG factory do one off account fixes for us. No process has been specified.</p>
--	-----------------------	---