Gillian McKnight-Tutein
ITDE 7005/7006: Instructional Media and Technology
Face to Face Lesson Plan
Due: April 19, 2004

Background Information:

Operations at Unicare Corporation cease if an individual does not utilize the phone appropriately. Each phone call the Customer Service Center receives is regarding the determination of eligibility of a client, patient, or health plan member for federal- or state-funded assistance programs. These people depend on us to handle their calls professionally and efficiently. The Televantage phone system plays a big role in those two aspects.

New associates normally utilize the Televantage phone system (software) via the computer desktop to log in to their phones, answer calls, and transfer calls.

There are times when the system may be unavailable because of server or other technical issues. Associates are still required to answer the phones and respond to client and member requests.

Lesson Overview:

This module is designed to teach associates how to use the keypad on the phone (hardware) to manage their calls.

Objectives:

By the end of the lesson students will be able to use the phone keypad to:

- Log into the Televantage phone system
- Change password
- Transfer phone calls
- Forward phone calls
- Record a greeting
- Retrieve voicemails

Topics:

- Televantage Phone System
- Logging into Televantage
- Changing passwords
- Transferring phone calls
- Recording a greeting
• Retrieving voicemails
• Forwarding phone calls
• Summary

**Activities:**

• Transferring a call – Facilitator will call student. Student has to use the keypad to transfer the facilitator to another student’s extension. Each student will have a list of the other extensions.
• Retrieving voicemails – Facilitator will use the message grid to leave a different message for each student in their voice mailbox. Students will retrieve and write their name and their message on a piece of paper to turn in. Students will be “graded” on whether their particular message matches what is on the message matrix.
• Forwarding phone calls – Students will return the message left by the facilitator (currently in their voice mailbox) to the facilitator’s voice mailbox.

**Audience Description and Analysis:**

This module is a primer targeted towards associates who are not familiar with the Televantage telephone system. Participants are at a novice level.

**Evaluation and Assessment Plan:**

Assessment - Each student will demonstrate proficiency through role play performance of activities. Successful completion of each task is considered proficiency. Each student’s performance is marked on an assessment sheet with comments (if necessary).

Evaluation – Each student will have the opportunity to complete a survey, rating the course as well as the facilitator.

**Proposed Media and Rationale:**

• ToolBook is the software that will be used to build this lesson.
• It will be used with a projector and screen
• Presentation will contain audio, video and text
• PowerPoint and MS Word will be used to create documents and handouts for the class.
• Actual phones (hardware) will be used to conduct the activities.
Materials:

- Blank Post-It Note pad
- Assessment sheet
- Facilitator Extension and Message grid
- Student Extension List
- Surveys
- Phone diagram (reference)
- PowerPoint handout (for notes)
- Televantage tip sheet (reference)

Pre-Work:

The **Facilitator Extension and Message grid** and **Student Extension lists** are unique to each class and must be prepared in advance of the class, complete with names, student extension numbers, the extensions calls will be forwarded to, and the messages to be left.

Scripting

Present Slide 1 – What is TeleVantage?

Slide 1 contains video of a Customer Service Representative (Tammy) answering a call on her phone at her desk.

Facilitator starts the video clip.

*Phone rings.*

*Thank you for calling Unicare. This is Tammy. How can I help you?*

Facilitator stops the slide suddenly.

**Facilitator:**

Whoa whoa. I think we’re getting a little ahead of ourselves here. We want you to be as proficient as Tammy when using the phone, but there are a few things you have to learn first.

Welcome to TeleVantage Training

TeleVantage, which is made by Artisoft, is the phone system that Unicare associates use to handle and manage all inbound and outbound calls. Operations at Unicare Corporation cease if an individual does not utilize the
phone appropriately. Each phone call the Customer Service Center receives is regarding the determination of eligibility of a client, patient, or health plan member for federal- or state-funded assistance programs. These people depend on us to handle their calls professionally and efficiently. The Customer Service Representative (CSR) and the Televantage phone system play a big roles in those two aspects.

New associates normally utilize the Televantage phone system (software) via the computer desktop to log in to their phones, answer calls, and transfer calls.

There are times when the system may be unavailable because of server or other technical issues. Associates are still required to answer the phones and respond to client and member requests.

The training that you are about to receive will also show you how to perform the administrative phone functions necessary for you to perform your daily duties, as well as an explanation what situation you will use certain functions.

Present Slide 2 – What Am I Going to Learn?

Facilitator:

Our goal is to make you aware of Televantage’s capabilities and to show you how to perform basic functions using your phone. At the conclusion of this training you will be able to:

1. Log into the Televantage phone system
2. Transfer phone calls
3. Forward phone calls
4. Record a greeting
5. Retrieve voicemails

Present Slide 3 – What’s On My Phone?

- Slide 3 includes a digital image of the telephone and is a simulation of the four main parts of the phone that the Customer Service Representatives will have to use to complete their phone tasks. As the facilitator points out each of the four functions, the particular part of the phone diagram will be highlighted.

Facilitator:

The phones have specific features that you will use over and over again to perform basic functions. These features include:

1. The number keys
2. The flash button
3. The asterisk key and the
4. The pound key

Can you find all of these on the phone that is at your desk right now?

Present Slide 4 – How Do I Log In?

**Facilitator:**

Before you can begin to use the phone system to perform any function, you have to login. You login twice during the day: When you begin your shift and as you return from lunch. You also log out twice during your workday: when you leave for lunch and upon leaving work at the end of your shift.

Everyone follow along with me. We’re going to login for the very first time: Pick up the phone receiver and press the pound key. (Pause) Now, enter the four-digit extension number taped to your phone. (Pause) Okay, now that we’ve done that, press the pound key again. Enter 0000.

You will be told your current status and how many voicemail messages you currently have. Since this is your first time logging in, it will be 0. Let’s hang up receiver now.

Present Slide 5 – How Do I Change My Password?

**Facilitator:**

We now have to change your password. Follow along with me:

1. To do this you will first need to follow steps 1-5 to login
2. Press option 6
3. Press option 3
4. Enter your new password

How was that for you? *(Field responses)* Did you find it easy? *(Field responses)* Your password remains the same unless you change it. It will never prompt you to change it, as is the case with your computers every 6 months.

Present Slide 6 – How Do I Record a Greeting?
**Facilitator:**

There are times of course when you will not be available to receive phone calls. It is at those times that you would like the person calling to leave you a message so that their call can be returned.

Let’s use the login steps used previously.

After that press option 4, which will tell you what the active greeting is. Since you don’t have one yet, the voice will tell you that you have no active greetings. Press option 6 to record your new greeting. Let’s make it professional, but friendly. You now have some options:
- To hear greeting again press 1
- To re-record the greeting press 4
- To delete greeting press 7

Press 3 when you are finished recording your greeting. Raise your hand to indicate that you have finished.

Present Slide 7 – How Do I Retrieve a Voicemail?

**Facilitator:**

Well now that people have heard your beautiful and friendly voices, surely they will want to leave a message for you to return their call. This section will cover how to pick up voicemails from your Televantage mailbox.

Pick up the receiver and log in. The voice will tell you the status of your messages (The amount of old, new, and saved). You have a few options here that you would be prompted on how to continue.

* (Give time for them to listen)*

Were you able to hear the options? *(Field responses)* Were they simple to follow? *(Field responses)*

**ACTIVITY #1:**

The facilitator will use the message grid to leave a different message on each extension. Each student (when instructed to do so) has to use the phone keypad to retrieve the voicemail. The student will then record the message on a Post-It Note and have the facilitator check against the grid for accuracy.
**Facilitator:**

I am going to leave a voicemail on each of your voice mail boxes. When the light flashes on your phone indicating that you have a voicemail message, please retrieve the message and write it on the Post-It note next to your phone.

*Proficiency is measured by whether the message on the Post it Note matches the one designated to that extension as stated on the Message Matrix.*

(Facilitator checks Post-It notes. Matrix is marked according to performance. S-Successful, U-Unsuccessful as appropriate. Comments are written if necessary).

Present Slide 8 – How Do I Transfer a Call?

- Slide 8 includes a short video clip of how to properly transfer a call to another associate.

- Slide 8 includes a simulation of the keys on the phonepad used when transferring a call.

**Facilitator:**

Okay. Now that you’ve gotten that under your belt, let’s move on to transferring a call.

Transferring a call to another associate will occur quite often in your day-to-day activities. The first few times may be a bit harrowing, but you’ll get the hang of it.

Transferring a call requires professional and courteous service to both your external and internal customers.

Always transfer a call and acknowledge to the member, patient, or client that you are going to do that.

Facilitator plays simulation video clip

Once you receive the call you want to transfer. Press Flash 1. Enter the extension that you want to transfer the call to. If you don’t know the extension you can dial 411 for a name directory.

You should always announce the call and the nature of the call to the CSR and ask them if they can take the call.
If the person that you are trying to transfer the call to picks up, you can speak to them without the caller hearing you. Announce the caller. Then hang up or press flash 2 to connect the caller and complete the transfer.

We would then reconnect with the person calling to say that we have or have not connected and give them options such as, being transferred, being forwarded to the person’s voicemail or having them call back later.

If you would like to cancel the transfer (if you get the person’s voicemail or it is a wrong extension, you can reconnect to the caller by pressing Flash 1.

Facilitator stops video clip

Let’s see how Tammy does it.

Facilitator plays transfer video clip.

Tammy picks up the receiver.

Miss Tolbert? I’d be happy to transfer you to Ginger. Hold on one moment. (punches keys).

Hi Ginger. I have Miss Tolbert on the line and she’s calling to find out if her Medicaid application was approved. Would you like me to transfer her? Ok just a minute.

Miss Tolbert, are you still there? Great. I have Ginger on the line for you. Ok. Have a great day.

Facilitator stops video clip.

Facilitator:

As you can tell by Tammy’s example, transferring calls is more than pressing a few buttons.
Why do you think it was important to let Miss Tolbert know what she was doing? (Field responses) Why do you think it was important to inform Ginger about the nature of the call? (Field responses) Tammy did one more thing that showed her Customer Service savvy. Does anyone know what that it? (Field responses)

So now you’re going to try to transfer a call. I will call your extension and I will pretend to be a member. I will ask you to speak to a specific associate and you are to transfer me to that person. I am looking for you to be able to transfer the call completely to the correct associate within 5-10 seconds.

We ready?

**ACTIVITY #2:**

(*Hand out student extension list and directions for transferring*). The facilitator will call each extension and request to be transferred to another student. The student has to use the phone keypad to transfer the facilitator.

(*Calls are made to each student. Matrix is marked according to performance. S-Successful, U-Unsuccessful as appropriate. Comments are written if necessary*).

Present Slide 8 – How Do I Forward Phone Calls?

**Facilitator:**

Does anyone know the difference between forwarding calls and transferring a call? (Field responses). That’s right. When transferring a call, there is a person on the line that needs to speak to another person. When forwarding calls, you are either at another extension or away from work but still would like to receive your phone calls. Here’s what you do to forward your calls:

1. Login using previous steps
2. Press 5 to forward calls
3. To forward your calls to the number you are currently calling from, press 1 – your calls will be forwarded
4. To forward your calls to another extension, press 2 - enter the ext number. If correct press 1
5. To forward your calls to an external number, press 3 – enter access code (9), 1 (if long distance), phone number and # key
6. To cancel call forwarding press

**ACTIVITY #3:**
Each student will be assigned an extension to forward their calls to. Using the steps discussed earlier and following Televantage prompts, each student will forward their calls to the designated extension. The facilitator will then call each student. The expectation is that the student marked in the forwarding column of the matrix answers the call.

Proficiency is measured by whether the facilitator’s call goes to an extension other than that of the student forwarding the call, and the call is answered by the designated student at the extension.

(*Matrix is marked according to performance. S-Successful, U-Unsuccessful as appropriate. Comments are written if necessary*).

**Facilitator:**

We’re going to test your skills at forwarding calls this time. I will assign each of you the person to whom you must forward your calls. When you are done forwarding your calls, raise your hand and I will test to see if you were able to satisfactorily complete the task.

(*Call each person’s name and let them know the name of the individual that they should transfer their calls to. When they have indicated that they are done. Call the student’s extension, the designated person should answer.*)

Present Slide 9 – What Have We Learned?

**Facilitator:**

Let’s summarize what we’ve learned.

1. Have we learned how to log into the Televantage phone system? (*Field Responses*)
2. How about transferring phone calls? (*Field Responses*)
3. Do we know how to forward phone calls? (*Field Responses*)
4. And recording a greeting? (*Field Responses*)
5. Do we feel comfortable retrieving voicemails? (*Field Responses*)

Most of what you learned today will eventually become second nature, but in the meantime, here is some reference material that you can put up at your desk so that you don’t have to memorize. *Hand out reference material.*

Are there any more questions before we end the session? (*Field questions*).
If you all could take just a few more moments and give me some feedback on the training session so that I can make it better for future sessions. Here is a short survey that will only take a few minutes for you to fill out. After you have completed, you are free to leave. Thank you for your time today.

(Hand out evaluation sheets to students. Have students turn face down on the desk after they have completed)