Course Name: Onboarding Boot Camp – Customer Service	**Course Description:** This second session introduces the participants to customer service tools to support field managers with resolutions to payroll issues using MyRequests, and documenting interactions using Remedy.
Audience: All payroll new hires for Payroll Operations Team	**Prerequisites:** Onboarding Boot Camp - Day One
Session Timing: 5.16 hours (310 minutes), 15 minute break (2)	**Delivery:** PowerPoint slides, Handouts, Lecture, Discussion, Practice exercises
Lead Developer: Adrienne Thomas	**Assigned SMEs:** Betsy Brown/Talisa McDowell

Learning Objectives
After completing this course, learners will be able to:

- Identify the location of MyRequests
- Describe the purpose of MyRequests and how field managers need it
- Describe how the payroll support team support the field manager in using MyRequests
- Explain what Remedy is and why we use it
- Describe steps to read a work order
- Describe steps to create a work order
- Practice creating work orders
- Practicing sending an email in a work order
- Practice receiving an email in a work order
- Practice closing a work order
- Understand when to change a work order status to pending
- Identify where to find CTI's
- Explain the purpose of CTI's
- Define service level agreement
- Define the escalation process
- Understand why empathy is important when answering calls from field managers
- Explain how to set up email templates
- Explain how to use communication templates
- Explain why you should plan your work before keying information
- Understand the objective for task
- Understand the tools and systems needed to complete task
- Understand why the task is to be completed
- Understand what pieces of information are needed to complete the task
- Explain the timetable for this task
- Describe the part of the systems to used to complete tasks
- Describe the actions to be completed after the task has been completed in the system
- Describe the process of logging into the Cisco Phone System

Note: These objective are included, where they are covered, in the first column of the design outline below.

Section/Learning Objectives	Time	Topics	Methods, Resources, and Requirements
Recap from the previous lesson - *answer any questions about job observations and set the expectations for the session*	15	**Recap of previous session information** • Q&A for Job observations • Ice breaker – Game to review previous session information • Training housekeeping Schedule Breaks The parking lot for unanswered questions	**Methods:** • Lecture • Discussion • Training game **Resources and Requirements:** • Training Agenda • Jeopardy game, etc. • The parking lot may be used to answer questions where the information not readily available to the Instructor
Getting to know MyRequests • Identify the location of MyRequests • Describe the purpose of MyRequests and how field managers use it • Describe how the payroll support team support the field manager in using MyRequests	20	**Introduction to MyRequests** • Location • Features and benefits • Navigation for managers	**Methods:** • Lecture • Discussion • Slides **Resources and Requirements:** • MyRequests Training Guide • MyRequests questions activity – reviewing Knowledgebase Articles
Practice – MyRequests Activity • Reinforce previous topic with hands-on practice activity • Submit case with form completed • Navigation Role Play with practice call	30	**Present Activity** • Scavenger Hunt • Complete forms for Tasks in MyRequests	**Methods** • Scavenger Hunt • Role Play **Resources and Requirement** • Scavenger Hunt Activity • Complete form Activity
Getting to Know Remedy • Explain what Remedy is and why Payroll Customer Service uses it	35	**Introduction to Remedy** • Explain components of Remedy • Explain how to read a Remedy work order	**Methods:** • Lecture • Discussion

Section/Learning Objectives	Time	Topics	Methods, Resources, and Requirements
• Describe steps to read a work order • Describe steps to create a work order • Understand when to change a work order status to pending • Identify where to find CTI's • Explain the purpose of CTI's		• Demonstrate how to understand and interpret manager instructions in a Remedy work order ○ Explain how to find pertinent information in Remedy ○ Demonstrate how to find pertinent information in Remedy ○ Explain steps to create a Remedy work ○ Demonstrate creating a Remedy work order ○ Demonstrate when to ask for additional information ○ Explain when to change a work order status to pending ○ Demonstrate how to change a work order status to pending ○ Explain how to send an email in Remedy ○ Demonstrate sending an email in Remedy ○ Explain how to resolve a Remedy work order ○ Demonstrate how to resolve a Remedy work order	• Demonstration **Resources and Requirements:** • Remedy questions activity • Sample work orders to read • Work order diagram • Work order Etiquette • Common CTI Quick Reference • Do's and Don'ts **Activity** ○ Create 2 work orders ○ Send an email to instructor from Remedy work order ○ Change the status of the work order to pending ○ Resolve the work order
Remedy Practice Activity: • Reinforce previous topic with hands-on practice activity • Practice creating work orders • Practicing sending an email in a work order	30	**Provide exercises for practice** • Practice how to read a Remedy work order • Practice setting work orders to Pending status • Practice resolving work orders • Practice finding pertinent information in a Remedy work order	**Methods** • Scavenger Hunt/Practice activity **Resources and Requirements** • Personnel number and check date to review • Remedy

Section/Learning Objectives	Time	Topics	Methods, Resources, and Requirements
• Practice receiving an email in a work order • Practice closing a work order		• Practice keying Remedy work orders • Practice replying to Remedy work orders • Practice sending emails in Remedy work orders • Allow time for participants to complete activity • Debrief on the activity	
Break	15	• 15 minute break	
Empathy as a Call Handling Strategy	60	**Facilitate Activity Listening**	**Methods** • Active Listening PowerPoint • Video • Listening exercise **Resources and Requirements** • Video • Active Listening exercise • Active Listening Handouts
Desktop organization • Define service level agreement • Define the escalation process • Understand why empathy is important when answer calls from field managers • Explain how to set up email templates • Explain how to use communication templates	30	Demonstrate best practices for desktop organization • Review Guidelines and Escalations • Discuss the use of templates • Demonstration of setting up email template using instructions • Review communications templates and when to use • Demonstrate how to use communication templates	**Methods:** • Discussion • Demonstration **Resources and Requirements** • Email template instructions • Communications template • Payroll Guidelines and Escalations **Homework** • Set up 3 email templates in Outlook ○ Hire date change ○ Pay card link ○ Pay card reverse
Time Management	60		

Section/Learning Objectives	Time	Topics	Methods, Resources, and Requirements
Planning your work • Understand what the manager's request in every payroll issue • Determine systems and tools needed to resolve payroll issue • Understand the timeline of the payroll issue • Understand what pieces of information is needed to resolve a payroll issue • Understand what systems and tools to use • Understand what actions should be taken after the system tasks are completed	30	• Discuss preparation needed to create a plan to resolve the payroll issues • Review planning your work document	**Methods** • Lecture • Discussion **Resources and Requirements** • Planning your work document
Break	15	• 15 minute break	
Cisco Phone System • Describe steps needed to login to Cisco Phone system	30	**Demonstrate login to Cisco Phone System**	**Methods:** • Demonstration **Resources and Requirements** • Instructions to login Cisco phone system
Wrap up	10	• Review Topics and Answer questions	
Assessment *Ten questions to allow learners to demonstrate their understanding of these topics. Learners must get 80% or better to receive their login credentials and continue to the next module.*	20	• Questions will be multiple choice/single answer, multiple-choice/multiple answer, and true or false. • There will be at least one question from each section.	**Methods:** • Assessment • Participants grade their neighbor's quizzes **Resources and Requirements** • Paper and pencil quiz
Total Session Time	340		