LAG.

PARTNERS
PREPARING
PEAK
PERFORMERS[SM]

SB100

BILLING AND COLLECTIONS

Small Business - Regional

Learning Advisor Guide

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Common Billing Explanations

Learning Advisor Guide
SB100 - Lesson 1

March 1995

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COMMON BILLING EXPLANATIONS

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COMMON BILLING EXPLANATIONS

GETTING STARTED

ESTIMATED TIME

Class Duration	The estimated time for completion of this lesson is 2 hours.

ADVANCE PREPARATION

Separate Handouts	Two sets of Handouts are provided. The first Handout is for all states **except** Georgia, Kentucky and North Carolina. The second Handout is for Georgia, Kentucky and North Carolina **ONLY**. Remove the slip sheet and inappropriate Handout prior to distributing.
Verify With Local Office	Check with the participants' office and verify: • Guidelines for referring customers with questions handled by a different entity. • BOCRIS Informational Screens most commonly used by the local office.

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Live Accounts	Obtain and make copies of a Live **customer** bill to be used in the "Customer Bill Exercise". Select several "Live" account numbers from a local directory to be used in lesson exercises.
Handbook/ OLD	Determine if Late Payment charges are applicable in the participants' area. If so, review the Handbook pages or OLD.
Overhead	Make an overhead of the objectives from the paper copy following this guide. (OH 1)
Large Sample Bill	Locate a laminated sample bill for use with this lesson. It should be displayed throughout this course and referred to as needed.

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REFERENCE MATERIAL

Available Material	The Regional BOCRIS Reference Guide is available to provide additional information on the individual bill fields. OLD/Operating Standards are available for Late Payment Charges and SCORS.

PREREQUISITES

Prior Knowledge	Participants should have completed prior lessons regarding accessing a BOCRIS bill.

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OBJECTIVES

At the conclusion of this lesson, participants will be able to:

- Identify BOCRIS bill fields and read a BOCRIS bill.
- Identify, enter and remove Account Status Indicators.
- Access BOCRIS Informational Screens.
- Answer frequently asked billing questions.
- Identify a Late Payment Charge and waive or cancel the charge, in states where applicable.
- Understand the purpose of SCORS.

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LESSON

Introduction

Begin this lesson by covering the objectives on the overhead.

Lesson Overview

In this lesson, we will talk about:

- Bill processing.
- Questions customers ask when they receive a South Central/Southern Bell bill.
- BOCRIS bill fields that provide the information necessary for you to answer customer questions.
- Late Payment Charges and the states in which this charge is applicable.
- Methods by which you take credit for the work you have done (SCORS).

Distribute

Provide each Participant with a lesson Handout.

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THE MAKING OF A BILL

Read	Have the participants read The Making Of A Bill pages in their Handouts . This describes how bills are created by Comptrollers, mailed to customers and viewable in BOCRIS.
Address Participants' Questions	Upon completion, answer any questions the participants may have.

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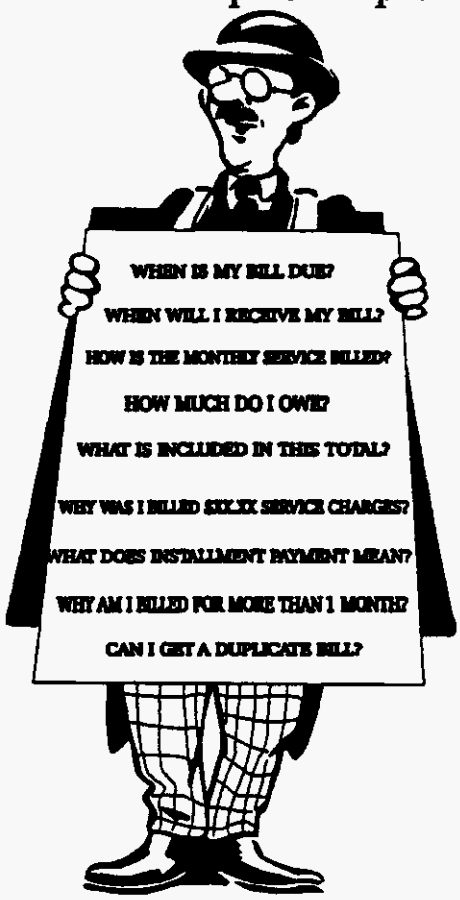
CUSTOMER BILL EXERCISE

Distribute

Provide participants with copies of a Live customer bill.

Instructions

Have participants review the customer bill. Solicit basic questions a customer may call the Customer Support Center/Collection Center to ask. Board each as it is provided. Make sure your list includes only those subjects that your entity will handle. Examples are provided below.



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Note	If questions are asked that will be handled by another entity, advise participants how the referral will be handled.
Debrief	This exercise was done to acclimate the participants to a BellSouth bill from the customer's point of view. In the next section of training, participants will learn how to read the BOCRIS bill fields. These fields will be used to answer many of the customers' questions just listed by the participants.

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BOCRIS BILL FIELDS

Read

Have participants read Handout Pages entitled BOCRIS Bill Fields. Caution participants to take their time in reading the information. A **lot** is covered in these pages.

Exercise

Upon completion of the reading, pair participants. Have them access a Training Data Base account listed below. Each pair is to read each bill field from left to right and explain the information provided.

Spend several minutes with each pair of participants to check for understanding of the fields. Be available to answer questions or correct misunderstandings.

Training Data Base Account Numbers

Account numbers:

- 0062
- 0798
- 1000
- 1009

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ACCOUNT STATUS INDICATORS

Large Sample Bill	Review where the status indicator(s) will populate. This information will be located on the first line of the bill between the Live indicator and the four digit abbreviation for the service exchange.
Introduce Section	Next you will learn how to manually enter an Account Status Indicator. You may want to review the different indicators available. These were previously provided in the bill fields Handout tables.
Read	Have participants read the Handout pages entitled Account Status Indicators. They should also complete the Review/Practice on the next page.
Training Data Base Account Numbers	Account number: - 0758 The account numbers previously listed may also be used.

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BOCRIS INFORMATIONAL SCREENS

Purpose

These screens may provide information which will be useful when answering customers' questions.

Terminal Exercise

Have participants:

- Logon to BOCRIS.
- Access a Live account number.
- Type HELP on the message line.
- Depress PF6.

Help Screen Explanation

Explain the information provided on the Help screen.

The Help Screen provides a list of many of the frequently used informational screens available in BOCRIS. To access any of the screens, type the screen command listed in the first column and then depress PF7. A description of the screen is also provided.

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Accessing Frequently Used Screens

Using the screen types you pre-selected, have the participants practice accessing those screens. Provide them with an explanation of each screen and when it should be used.

NOTE: Also introduce the following screens.

- The CBS, Comptrollers Billing Systems, screen. This screen provides the address to mail a bill payment. To access, enter CBS on the message line and depress PF7.

- The Frequently Called Numbers screen. To access, enter BTN* (* = *first letter of the office's or group's name*) on the message line and depress PF7. BTN stands for Business Telephone Numbers. This screen provides the telephone numbers for company departments and functions. For example, enter BTNR to access the telephone numbers for repair service.

Other Informational Screen

Have the participants access the following screens.

To Access:	Command:	Depress:
Bill Summary Screen	BSUM	PF4
Local Service Itemization Screen	LSI	

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BSUM & LSI Explanation

Explain the two screens using the following information.

When coded information is provided on the BSUM line of the BOCRIS bill, the BSUM screen can be accessed for a full explanation.

For example, if IB is displayed, the BSUM screen provides information on the total amount of an installment billing arrangement, the original number of months for the installment billing and the number of months remaining.

Access the LSI screen while viewing a customer's account. This screen provides an itemization of services to which the customer currently subscribes.

The LSI screen groups like USOCs on a current CSR, the total monthly charge for the grouped USOCs, the USOC and an English definition for the USOC. A USOC is a code that represents items of service we provide, such as, 1FB means an individual business line. The USOC's monthly charges are then totaled.

NOTE: Since the information shown on these screens is for a specific customer, the PF4 key is used to access them while viewing the specific customer's account.

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Another Helpful Tool

When handling inquires, it will help identify which charge is in question if you will ask for the item number. Remember, charges on a customer's bill are numbered. Each charge has an item number. By identifying which item, you can directly view that item without paging through the bill.

Ask the customer:

Each charge on your bill is numbered. To which item are you referring?

Accessing By Item Number

While viewing a customer's account:

Type IT# on the message line
(# = *item number*)
Depress PF2

For example: to access item number 35, enter IT35 on the message line of the customer's account and depress PF2.

This command can be combined with the command to access a prior or current month's bill.

For example: to access item number 115 on last month's bill, enter PR1,IT115 on the message line of the customer's account and depress PF2.

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UNREGULATED CHARGES

Purpose

In this part of the Handout, participants will be shown where unregulated charges appear on the bill and memo screens. These pages demonstrate how unregulated charges are separated on the Bill and Memo screens and give a brief explanation. Participants will be asked to locate a list of products and services whose billing will be in this category.

Read

Have participants read Handout pages entitled Unregulated Charges.

Stress

Upon completion, make sure the participants understand how vital it is that unregulated charges be handled correctly.

There are **STRINGENT LEGAL REQUIREMENTS** and guidelines that must be followed to the letter when discussing, treating, or adjusting any item that is an unregulated charge. Products or services classified as unregulated charges are covered by Operating Standards which give specific guidelines for handling customer inquiries.

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Handbook/ OLD	Refer participants to their Handbook /OLD to the Enhanced Service Provider (ESP) information. Have participants read the information provided.
Discuss ESPs	• Enhanced Service Providers are companies we have agreements with to bill and collect for their services or products. • We handle limited types of inquires for these customers. • ESP charges will appear on the customer's bill under the heading of Other Service Provider immediately after Carrier charges.
Ask	Ask the participants for their questions. Answer any basic questions at this time. Let the participants know we will be discussing unregulated products and services as they progress through their training.

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LATE PAYMENT CHARGES

Note

Have participants skip this material in Georgia, Kentucky and Tennessee **unless** they will be handling accounts covered by a tariff where Late Payment Charges (LPC) are billed.

Special codesets are applicable in North Carolina. All other states should skip the North Carolina specific information.

Purpose

Late Payment Charges are billed when a bill is not paid in full by the next bill date or 10 days after the payment due date in North Carolina. This material covers when and where LPCs are billed, percentages charged, waive commands and practice with commands.

Read

Have participants read Handout pages entitled Late Payment Charges and complete the Review/Practice that follows, skipping any inappropriate pages.

Training Data Base Account Numbers

Account numbers:

- 0521
- 0533
- 0658
- 0662

REVIEW/PRACTICE

Purpose

This exercise is designed to use the previously boarded "customer" questions and the lesson information regarding a BOCRIS bill. Participants should apply what has been taught to answer the customer's questions.

Training Data Base Account Number

Use the TDB account number below for this exercise.

- 7048

Exercise

Using the "customer" questions boarded at the beginning of this lesson, have participants:

- Locate the appropriate field or Item Number to answer each question.
- Answer the "customer's" questions.

Continue until all questions that can be answered by information in this lesson are answered. All other questions should be placed in a "Parking Lot" until future lessons cover the information.

The participants may use their Handouts as reference. If additional practice is needed, use the Live accounts.

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SCORS

Purpose	SCORS is a work measurement system which is used to make a record of all work you do each day. These Handout pages describe SCORS, SCORS entries and categories, TELSAM and how to exclude a contact from TELSAM.
Read	Have participants read Handout pages entitled SCORS and complete the exercise that follows.
Ask	Answer questions the participants may have.

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SUMMARY

Discuss

Display the lesson objectives and review each.

Review

Review the following:

- The process of creating a monthly bill.
- The information provided in the BOCRIS bill fields. *This should be a high-level review.*
- The importance of adding Account Status Indicators when an appropriate situation arises.
- Unregulated charges are not governed by the PSC. Service **cannot** be denied for non-payment of these charges.
- Late Payment Charges, where applicable.
- SCORS and TELSAM.

Issues

Cover any outstanding issues or concerns. Assure participants that the questions on the "Parking Lot" will be covered later in training.

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PRESENTATION MASTER

OVERHEAD

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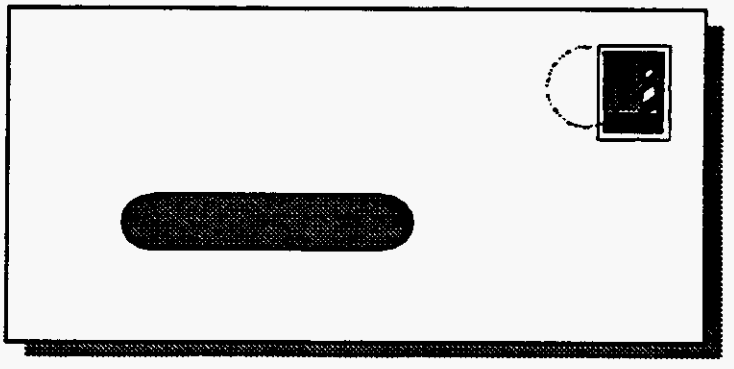
Common Billing Explanations

- ✓ Identify BOCRIS bill fields and read a BOCRIS bill.
- ✓ Identify, enter and remove Account Status Indicators.
- ✓ Access BOCRIS Informational screens.
- ✓ Answer frequently asked billing questions.
- ✓ Identify a Late Payment Charge and waive or cancel the charge, where applicable.
- ✓ Understand the purpose of SCORS.



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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 1 - Common Billing Explanations

Date of Course/Lesson 03/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating**:

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

_____

_____

_____

_____

What information are you getting in this course/lesson that you don't need?

_____

_____

_____

_____

_____

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Are you able to teach this course/lesson in the sequence in which it is written? If not, explain how it works best for you.

Was the material easy to understand?

Please circle: Yes or No

If no, please explain:

One of our goals in training is to keep material brief, to the point and yet cover all topics adequately. Did this training meet that goal?

Please circle: Yes or No

If no, please explain:

How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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Vickie Capuzzo
Room 202
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BILLING AND COLLECTIONS
SB100 - SMALL BUSINESS - REGIONAL

TRANSMITTAL

File Code	470.0600
Date	July 21, 1995
Attached	Course SB100, Lesson 2 - Payments LAG - In its entirety (Dated 07/95) Handout - In its entirety (Dated 07/95) PMTS CBT Screens - Updated as needed (Dated 07/95)
Cancels	Course SB100, Lesson 2 - Payments LAG - In its entirety (Dated 03/95) Handout - In its entirety (Dated 03/95)
Includes	• Added information regarding telephone payments. NOTE: Incorporates all information available through July 15, 1995.
Effective Date	Upon receipt.
Respondent	Vickie Capuzzo, 205 945-2031

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Payments

Learning Advisor Guide
SB100 - Lesson 2

July 1995

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PAYMENTS

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PAYMENTS

GETTING STARTED

ESTIMATED TIME

Class Duration	The estimated time for completion of this lesson is 2 hours, including terminal practice.

ADVANCE PREPARATION

CBT Lesson	Complete the **PMTS** lesson and obtain answers to any questions you may have.
Register Participants	Register the participants using their Social Security Numbers. The CBT course name is **PMTS**.
Select Accounts For Review/Practice	Select accounts appropriate for the participants to review after completing this lesson. You may find it helpful to access the USER ID Productivity Report Screen to locate accounts.

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Overhead

Make an overhead of the Objectives from the paper copy following this guide. (OH 1)

Accessing The USER ID Productivity Report Screen

Obtain the password for this screen from the local office and an USERID of one or more experienced Collection Representatives, then:

- Logon BOCRIS and enter the Area Code.
- Type USER on the message line and depress PF7.
- Enter the Password from the local office and a Collection Representative's USERID.
- Enter an X in the field beside TREATMENT ACTIVITY ONLY (ALL).
- Depress PF7.

An example of this screen follows on the next page.

The system will respond with a list of accounts the Collection Rep has handled that day.

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USER ID Productivity Report Screen Exhibit

Below is an example of a USERID Productivity Report Screen.

```
205

                USER ID PRODUCTIVITY SUB-MENU REPORT SCREEN

PASSWORD: xxxx                                          USER ID: ydejutg

SELECT ONE:

     x  ALL ACTIVITY (DEFAULT)
     _  SELECT TYPE CODE  ____ (ENTER APPROPRIATE TYPE CODE)
     _  TREATMENT ACTIVITY ONLY (ALL)
     _  SELECT TREATMENT COMMAND OR ACT/REFERRAL CODE
           _____ ACT CODE OR REFERRAL TYPE

                                (OR)

           _____ OLT COMMAND (N, D, R, ETC)



DATE: __ - __ - 95 (OPTIONAL)
START TIME: __ . __ . __ (OPTIONAL)   END TIME: __ . __ . __ (OPTIONAL)
ROUTE TO PRINTER LTERM: ________ (OPTIONAL)
```


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REFERENCE MATERIAL

Handbook/ OLD	Information regarding payment locations is provided in the participant's Handbook and OLD.

PREREQUISITES

Prior Knowledge	Participants should have completed prior lessons concerning taking a lesson in CBT, accessing a BOCRIS bill and reading the BOCRIS bill fields.

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OBJECTIVES

At the conclusion of this lesson, participants will be able to determine:

- Which payment options are available to customers.
- How mail and Payment Agency payments are processed and posted to the Bill screen.
- How Tellers process payments made in the Customer Payment Centers and Depositories, and how they appear on the records.
- How any "expected payment" will affect the account until it actually posts to the Payment & Adjustment field.
- How to access and read the Comptroller Billing System (CBS) Screen.

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LESSON

Introduction

Begin by covering the objectives overhead you previously made.

Overview

Provide a brief overview of the CBT lesson.

- It is a regional lesson which introduces the various payment methods available to customers, how payments are processed, and how to determine the amount the customer owes. (The Automatic Funds Transfer Plan is taught in another lesson.)

- You will learn how to access the NXX , CBS, Job Aid (Payment Agencies) and Payment & Adjustment Screens.

- Instructions for providing a +RD (Return Document) and entering an expected payment are demonstrated.

- Expected Payments cause bill fields to change to the EMT DUE, ERB, and EDN fields. These changes are explained.

- The NO DOC Form and Check Digit field with Mechanized Payment Agencies is explained. A copy of this form is provided in the Handouts.

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Distribute	Provide each participant with a Handout. Ask them to let you know when they are ready to start the review of Live accounts. This is to be done as a class.
Logon to PMTS	Have participants logon and take the lesson PMTS.
Note	On the following pages are the review questions and situations which the participants will encounter in the CBT lesson.

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CBT REVIEW/PRACTICES

OBJECTIVE 1

Which of the following is the preferred method of payment?

A) At Customer Payment Center
B) By mail to PRO/CMR (Mail It!)
C) At payment agency

The correct answer is B.

Match the following:

1. Payment option available to all customers
2. Where customers pay the bill in person directly to South Central/Southern Bell
3. Payment drop off locations
4. Where customers pay a bill with a local merchant
5. Option customers may choose to use after making arrangements with their bank

A. Payment Agency
B. CPC
C. Mail to PRO/CMR
D. Telephone Payment
E. Depository

The correct answers are 1 - C, 2 - B, 3 - E, 4 - A, 5-D.

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OBJECTIVE 2

Which of the following do you think would be processed faster?
1) Payment which is sent in with the Return Document
2) Payment without the Return Document

The correct answer is 1.

Use your Handbook to locate the answer. A payment posted to a customer's account as a payment made with a payment document will have the code _____ between the payment date and payment amount on the face of the Bill.

The correct answer is A.

Which of the following ways to pay the bill is best for our customers and our Company?
A) Unauthorized agency
B) CPC Depository
C) Mail to PRO/CMR

The correct answer is C.

Payments that have been processed by PRO/CMR to an account are reflected in the:
A) Notations Field
B) Payments and Adjustments Field
C) CMR Payments Field

The correct answer is B.

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OBJECTIVE 3

What is the Type Code for a TIPS payment?

The correct answer is TIPS.

How can you determine who processed a TIPS payment?

The correct answer is by the Teller's USERID.

TIPS payments are posted to the Notations Field.....
A) By tomorrow
B) Within hours
C) Within seconds

The correct answer is C.

OBJECTIVE 4

A screen will display a Bill/Memo, the participants will be asked to determine how much is currently owed or when the bill was paid.

Bill for Jerry Dabney Attorney, 555-9363.
How much does Mr. Dabney currently owe? *The correct answer is $5.20.*

Bill for Wylie Agriculture, 555-4748.
When was the last payment received? *The correct answer is 101299.*

Bill for Marie Osmond Recording, 555-0228.
How much is currently owed on this account?
The correct answer is $23.17.

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REVIEW/PRACTICE

Student Terminal Practice	The participants' Handouts provide them with Training Data Base accounts to practice accessing the NXX and Job Aid Screens and determining check digits and RAO codes.
Live Accounts	Provide participants with preselected Live account numbers. Have participants review the first two accounts together and determine what amount is due on the accounts. This activity should then continue in Learning Partners. Be available to answer all questions and spot check for understanding and accuracy.

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SUMMARY

Discuss

Have the participants turn back to the objectives in their Handouts and review each objective.

Review

Review the following concerning customer payments:

- Name the ways a customer may pay a telephone bill.
- Describe the effect expected payments have on bill fields.
- Explain why a mail payment is the preferred method of payment.

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PRESENTATION MASTER

OVERHEAD

BLANK

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Are you able to teach this course/lesson in the sequence in which it is written? If not, explain how it works best for you.

Was the material easy to understand?

Please circle: Yes or No

If no, please explain:

One of our goals in training is to keep material brief, to the point and yet cover all topics adequately. Did this training meet that goal?

Please circle: Yes or No

If no, please explain:

How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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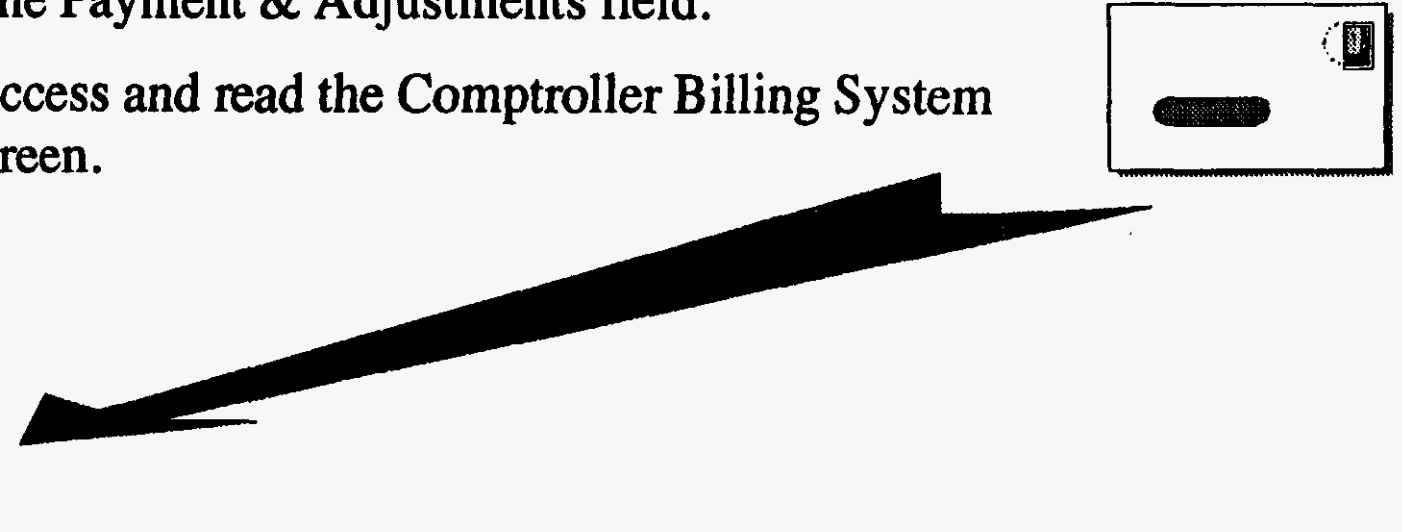
Payments

You will be able to determine:

- Which payment options are available to customers.
- How mail and agency payments are processed and posted to the Bill screen.
- How Tellers process payments made in the Customer Payment Centers and Depositories and how these payments appear on the customer's records.
- How an "expected payment" will affect the account until it actually posts to the Payment & Adjustments field.
- How to access and read the Comptroller Billing System (CBS) screen.



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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 2 - Payments

Date of Course/Lesson 07/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating**:

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

_____

_____

_____

_____

What information are you getting in this course/lesson that you don't need?

_____

_____

_____

_____

_____

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TRANSMITTAL

File Code 470.0600

Date April 14, 1995

Attached
Course SB100, Lesson 3 - Automatic Funds Transfer
LAG - In its entirety (Dated 04/95)
Handout - In its entirety (Dated 04/95)

Cancels
Course SB100, Lesson 3 - Automatic Funds Transfer
LAG - In its entirety (Dated 10/94)
Handout - In its entirety (Dated 10/94)

Includes

- Corrected the number of days after the Bill Date in which a bill payment will be transferred from a customer's bank account.
- Updated bill confirmation statement.
- Corrected SCORS information.
- Added retention information on completed AFT authorization forms.
- Added the telephone number for Jonesboro Clerical Center.
- Added information regarding the effect of AFT on T & F orders with and without a number change.(*For Specialists Only*)
- Added information regarding changing accounts with the same bank.
- Clarified information regarding the posting of adjustments and the AFT account.

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- Added information regarding a stop payment on an AFT payment.
- Added objectives overhead.
- Added reference to OLD.

NOTE: Incorporates all information available through March 15, 1995.

Effective Date Upon receipt.

Respondent Vickie Capuzzo, 205 945-2031

TRANSMITTAL

File Code 470.0600

Date April 28, 1995

Attached
Course SB100, Lesson 4 - Assorted Contacts
LAG - In its entirety (Dated 04/95)
Handout - In its entirety (Dated 04/95)

Cancels
Course SB100, Lesson 4 - Assorted Contacts
LAG - In its entirety (Dated 11/94)
Handout - In its entirety (Dated 11/94)

Includes

- Update the DDA Screen.
- Added information regarding ordering local directories within an extended local calling area.
- Added new information regarding the printing of specific pages in MOBI.
- Added new information regarding the viewing of Carrier pages in MOBI.
- Added information regarding Duplicate Bill Charges for Florida, Georgia and South Carolina.
- Updated information regarding automatic MOOSA adjustments.

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- Changed reference to Business Repair Center.
- Added objectives overhead.
- Added reference to OLD.

NOTE: Incorporates all information available through April 15, 1995.

Effective Date Upon receipt.

Respondent Vickie Capuzzo, 205 945-2031

Automatic Funds Transfer

Learning Advisor Guide
SB100 - Lesson 3

April 1995

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Throughout this material, personal pronouns are used to refer to customers, trainees and other individuals. This was done to improve readability and is in no way intended to discriminate against persons of either sex. Nothing in this material should be construed to indicate a discrimination because of race, color, religion, sex, age or national origin.

How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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Vickie Capuzzo
Room 202
65 Bagby Drive
Birmingham, Alabama 35209
205 945 - 2031

Are you able to teach this course/lesson in the sequence in which it is written? If not, explain how it works best for you.

Was the material easy to understand?

Please circle: Yes or No

If no, please explain:

One of our goals in training is to keep material brief, to the point and yet cover all topics adequately. Did this training meet that goal?

Please circle: Yes or No

If no, please explain:

How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 3 - Automatic Funds Transfer

Date of Course/Lesson 04/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating**:

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

_____

_____

_____

_____

What information are you getting in this course/lesson that you don't need?

_____

_____

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_____

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Are you able to teach this course/lesson in the sequence in which it is written? If not, explain how it works best for you.

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If no, please explain:

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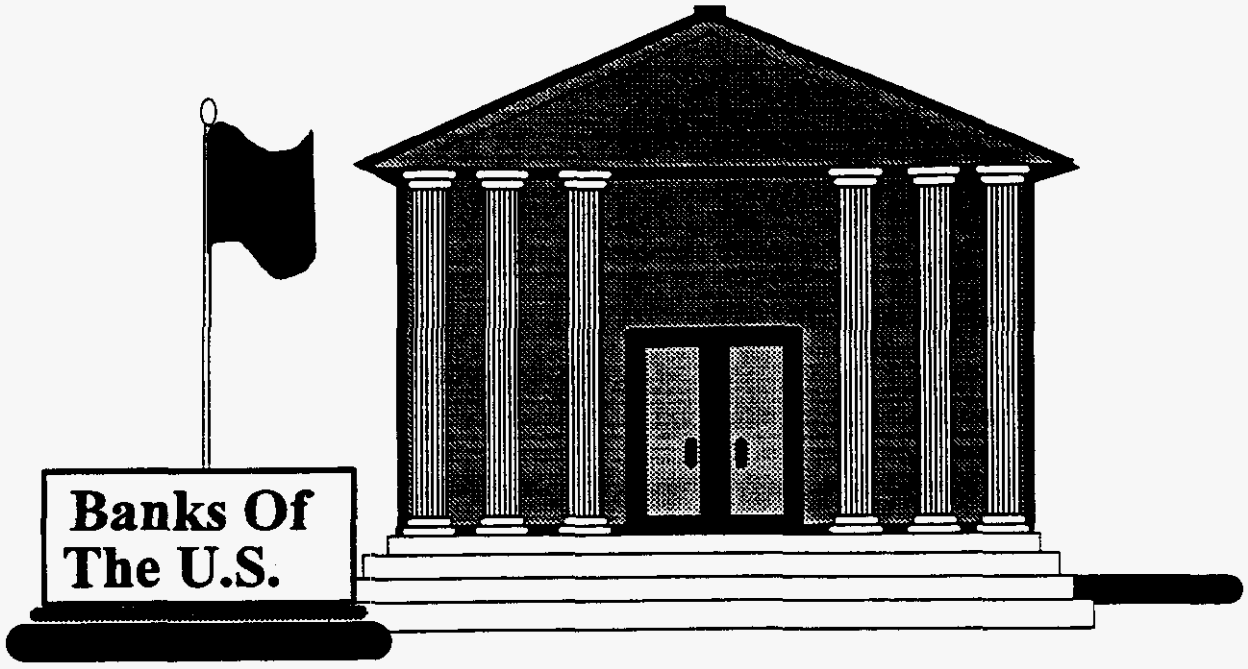
Please circle: Yes or No

If no, please explain:



Automatic Funds Transfer

At the conclusion of this lesson, you will be able to:

- Access and use the Mechanized Customer Correspondence Job Aids.
- Promote Automatic Funds Transfer (AFT) on appropriate contacts.
- Take appropriate action when a customer accepts AFT.
- Recognize AFT once it is established.
- Discontinue AFT.
- Remove AFT and arrange for enrollment with another financial institution or on another account within the same institution.

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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 3 - Automatic Funds Transfer

Date of Course/Lesson 04/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

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What information do you need in this course/lesson that is not provided?

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What information are you getting in this course/lesson that you don't need?

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AUTOMATIC FUNDS TRANSFER

GETTING STARTED

ESTIMATED TIME

Class Duration	The estimated time for completion of this lesson is 1.0 hour.

ADVANCED PREPARATION

Make Overhead	Make an overhead of the objectives from the paper copy following this guide. (OH 1)
Large Sample Bill	Locate a laminated sample bill for use with this lesson.

REFERENCE MATERIAL

Available Material	OLD/Operating Standards are available on Automatic Funds Transfer.

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PREREQUISITES

Prior Knowledge

Participants should have completed prior lessons regarding payment options available to customers.

OBJECTIVES

At the conclusion of this lesson, participants will be able to:

- Access and use the Mechanized Customer Correspondence Job Aids.
- Promote Automatic Funds Transfer (AFT) on appropriate contacts.
- Take appropriate action when a customer accepts AFT.
- Recognize AFT once it is established.
- Discontinue AFT.
- Remove AFT and arrange for enrollment with another financial institution or on another account within the same institution.

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LESSON

INTRODUCTION

Display Overhead

Begin this lesson by covering the objectives on the overhead.

Lesson Overview

In this lesson, you will discover:

- Two online Job Aids that will help you send correspondence to customers.
- Customers' needs for which Automatic Funds Transfer is a solution.
- AFT is a free service.
- The correct way to offer, establish, change and discontinue AFT for a customer.
- The effect AFT has on a customer's bill and the BOCRIS bill.
- Your responsibilities regarding AFT.

Distribute

Provide each Participant with a lesson Handout.

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DESCRIPTION OF AFT

Read

Have the participants read the Handout pages entitled Description Of AFT.

Review

From the information covered, review the following:

- AFT is a free service, no monthly rate or non-recurring charge.
- Money will be transferred from the customer's bank account on or after a specific date stated on the customer's telephone bill.
- AFT is available to most customers having a checking or saving account with a U. S. bank, credit union or savings and loan. (Each financial institution decides if electronic transfer of funds will be available to their customers. Assume the customer's bank participates. The bank will notify us if they do not.)

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BENEFITS and PROMOTION OF AFT

Read

Have participants read Handout pages entitled Benefits Of AFT and Promotion Of AFT.

Review

Check for understanding of the material by asking the following questions:

- Why does AFT benefit both the customer and BellSouth?
  It reduces expenses for both the customer and the company.

- What is one strong indicator AFT should not be offered to a customer?
  A customer with a history of returned checks is not a good candidate for AFT.

- What is a good indicator that AFT would be a solution for a customer who pays a bill late?
  AFT could benefit a customer who pays on approximately the same day each month after a treatment notice is sent and before the notice expires on the RB Date.

- What is the advantage of providing the date "on or after" which the money will be transferred from his/her bank account?
  This allows a customer time, after receipt of the bill, to ensure a sufficient amount of money is in the account for payment of the bill.

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- What does a "voided" check or deposit slip mean?
  *The **customer** should write VOID in large letters across the front of the check. This voids the check so it cannot be filled in and presented for payment.*

- What is the charge for establishing, changing or removing AFT on an account?
  There is no monthly or non-recurring charge for establishing, changing or removing AFT. NOTE: If the funds in the account are insufficient to cover the amount of the bill when the transfer is made, a charge will be billed. This is the same charge that will be billed when a check is returned for insufficient funds.

- If an AFT account has a Bill Date of the 10th, approximately what day will the funds be transferred from the customer's bank account?
  The funds will be transferred from the customer's bank account to BellSouth's on the 28th.

- Why is the customer's name included in the notation once AFT has been accepted?
  The customer's name is included to be sure AFT is being negotiated with a responsible party and if questions arise later any Representative or Specialist can determine by whom AFT was requested.

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MECHANIZED CUSTOMER CORRESPONDENCE and ENROLLMENT

Read

Have participants read Handout pages entitled Mechanized Customer Correspondence and Enrollment.

NOTE: Participants will be asked to access the two Mechanized Customer Correspondence Job Aids in BOCRIS. Be available to aid as needed.

Demonstrate

Using the sample bill, demonstrate the Message Line entry used to send an AFT letter.
Enter +AFA on the Message Line and depress PF6. This notes the account and gives SCORS credit.

If available, have each student view a deposit slip. Point out the bank transit number and account number printed on the lower left corner.

Review

Review the following information covered in the material:

- Mechanized Customer Correspondence Job Aids have all mechanized correspondence listed.

- The second sheet of the authorization form is provided for the customer's records. The first sheet is returned to the Jonesboro Clerical Center.

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ESTABLISHMENT OF AFT

Read

Have participants read Handout pages entitled Establishment Of AFT.

Review

Upon completion of the reading, review the following;

- Collection Representatives and Specialists are responsible for **sending** the AFT information to a customer. The Jonesboro Clerical Center is responsible for actual **establishment** of AFT.

- The notation created by the AFT input can be viewed by any Representative or Specialist accessing the customer's account. (*This notation will age off BOCRIS in approximately three months.*)

- The PPD field will change to the AFT field and be populated each month with the approximate date the money will be transferred from the customer's bank account.

- The account is made TNT and Late Payment Charges are waived in states where appropriate.

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CANCELING AFT and CHANGING FINANCIAL INSTITUTIONS

Read

Advise participants to read the Handout pages entitled Canceling AFT and Changing Financial Institutions.

Demonstrate

Using the sample bill, demonstrate the Message Line entry used to cancel/remove AFT.
*Enter *OAFT on the Message Line and depress PF6. This notes the account but* ***does NOT*** *give SCORS credit. A notation must be made to include the customer's name who requested cancellation using the Type Code BLG.*

Advise

Advise the participants:

- To change financial institutions, the same process is followed as canceling AFT and establishing AFT.

- The IAFT and OAFT commands (and/or order activity) are not allowed on the same day. If a error message is received when removing AFT, check the Memo notations for another AFT entry with the current date. If the request is still to be completed, it must be held and entered the next business day.

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Order Issuance And AFT

Discuss with Specialists only. (T & F orders are issued when an existing customer wishes to move his/her service from one location to another. T & F stands for **T**o and **F**rom. An N order is issued for **N**ew service. A D order is issued to completely **D**isconnect existing service.)

- When T & F orders are issued and a customer subscribes to AFT, the information will automatically transfer to the T order. If the customer wishes to discontinue AFT, enter OAFT on the T order.

- When T & F orders are issued and the AFT customer's number changes, the AFT information automatically transfers to the T order. However, there will be a two billing cycle delay before the bills are paid by the bank. The number change is treated like an N and a D order by the system. The customer must make arrangements to pay his/her bill each month until the AFT is re-established.

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CREDITS ON AFT ACCOUNTS and FINAL BILLS

Read

Have participants read the pages of their Handouts entitled Credits On AFT Accounts and Final Bills.

Advise

Upon completion of the reading, let the participants know:

- They are not expected to understand how to deal with an adjustment, only how an adjustment affects the AFT account. How to actually make adjustments will be taught in a later lesson.

- The credit is applied to the customer's next month's bill, when an adjustment posts to an account AFTER the bill payment has been transferred from the bank account. However, refunding the money is an option we can offer if this will cause the customer a problem.

- A stop payment on an AFT payment is only effective BEFORE the AFT payment has been transferred. Use this option as a last alternative. How to make an adjustment for the stop payment charges will be taught in a later lesson.

Ask

Answer any questions the participants have.

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REVIEW/PRACTICE

Terminal Practice

Have participants complete the terminal practice described in their Handouts on the Review/Practice page. Be available to assist.

Participants are to:

- Enter a notation as if a customer has accepted AFT. (*An example is provided in the Handout.*)
- Send an AFT authorization form. (*+AFA and depress PF6*)
- Enter a notation as if a customer has canceled AFT. (*An example is provided in the Handout.*)
- Send a confirming AFT cancellation letter. (*+47,MMDD and depress PF6*)

Learning Advisor Role Plays

Demonstrate, by role playing with a participant, how an incoming customer call should be handled to establish and discontinue AFT. Give the participants a Training Data Base account to view during the role play. *Training Data Base account numbers follow.*

During the role play, all participants should practice making appropriate notations and sending the +AFA and +47 letters on the accounts.

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They may practice entering the ***OAFT** command; however, BOCRIS will respond saying it's not allowed in this state. This reference is to the 101 Area Code used in the TDB.

Remind participants that their response should mirror the customer's request.

Learning Partners

Assign participants Learning Partners. Using the same Training Data Base accounts, have them role play AFT contacts.

Training Data Base Accounts

Use the following account numbers for the role plays.

- 0521
- 0658
- 0533

SUMMARY

OLD/ Handbook

Direct participants to the OLD/Handbook for AFT information. Have them read the information and discuss as appropriate.

Be sure the participants understand they ***do not*** have to input the information to establish AFT. The input of the enrollment information is a function performed by the Jonesboro Clerical Center.

Review

Review the following:

- The purpose of the MCCI and individual MCC letters online Job Aids.
- Automatic Funds Transfer is a solution to a customer need that will help a customer conveniently pay his/her bill on time.
- Participants can offer, send the authorization to establish or change and discontinue AFT for a customer. Jonesboro clerks actually establish AFT on a customer's account.
- Once established, AFT is shown on the BOCRIS bill and CSR.

Issues

Display the overhead objectives. Review each and cover any outstanding issues/concerns.

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PRESENTATION MASTERS

OVERHEAD

BLANK

AUTΩMATIC FUNDS TRANSFER

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PRESENTATION MASTER

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SUMMARY

Discuss

Display the lesson objectives and review each.

Review

Review the following:

- Verify the DDA address every time the BNA is updated.
- Verify the DDA address every time replacement or additional directories are ordered.
- Order all local directories from the DDA Screen.
- Request duplicate bills using the appropriate command.
- Meet all commitments!
- Handle the complaints of annoying calls when the calls are misdirected, solicitation or debt collection. Other types of calls are handled by the Annoyance Call Center.

Issues

Cover any outstanding issues or concerns.

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ANNOYANCE CALL HANDLING

Introduction

An annoyance call is any call a customer would rather not receive. As a Company, we have procedures and/or services to help customer's deal with these calls.

Read

Have participants read the Handout pages entitled Annoyance Calls.

Handbooks/ OLD

Refer participants to their Handbooks or OLD, Annoyance Calls. Review the information provided.

Notations

If the Rep/Specialist transfers a call to the Annoyance Call Center and provides information to the Center, the Type Code **MIS** should be used to note the account.

If the call is on-line transferred and no information is provided to the Annoyance Call Center, the Type Code **NWC** should be used.

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REVIEW/PRACTICE

Exercise

Have participants work together to practice updating the BNA & DDA Screens and ordering additional directories. (Include updating the standing delivery quantity and sending duplicate Bills in the various ways, BOCRIS and MOBI.)

They should also practice making and noting commitments. Point out the Message Line response after the transactions have been entered and the automatic Memo and CSR notations created. Have them enter a manual notation if required locally.

Be available to answer questions as they arise.

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PRESENTATION MASTER

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- How MOBI is used. Be prepared to discuss the differences in a BOCRIS Bill and a MOBI Bill.
- How microfiche copies of bills are requested from the Consolidated Customer Microfiche Group (CCMG).

Locate

The following items and charges will be discussed and provided during the lesson to the participants.

- Copies of the correspondence form.
- *Florida, Georgia and South Carolina* -- The duplicate Bill charge amount found in the GSST.
- Returned Bills to be handled in class.
- The LTERM address that should be entered on the MOBI Screen for printing.
- Local directory Call Guide Pages.

Make Overhead

Make an overhead from the paper copy at the end of this guide. (OH 1)

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TRANSMITTAL

File Code 470.0600

Date May 10, 1995

Attached
Course SB100, Lesson 5 - What The Computer Does For You
LAG - In its entirety (Dated 05/95)
Handout - In its entirety (Dated 05/95)

Cancels
Course SB100, Lesson 5 - What The Computer Does For You
LAG - In its entirety (Dated 11/94)
Handout - In its entirety (Dated 11/94)

Includes

- Re-formatted lesson.
- Added objectives and other miscellaneous overheads.

NOTE: Incorporates all information available through May 1, 1995.

Effective Date Upon receipt.

Respondent Vickie Capuzzo, 205 945-2031

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OBJECTIVES

At the conclusion of this lesson, participants will be able to:

- Update the Bill Name and Address and the Directory Delivery Address Screens.
- Handle requests for directories.
- Send duplicate Bills.
- Understand how to handle commitments.
- Understand how correspondence is handled in their area.
- Handle referrals to Repair Service.
- Know how to use LMOS/MOOSA interfaces and the guidelines for credit allowances due to out of service conditions.

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ASSORTED CONTACTS

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BILL NAME AND ADDRESS (BNA) SCREEN

Introduction

The first type of contact you will learn is how to handle changing the address to which a bill is mailed. How can we expect a customer to pay his/her Bill if we don't get a copy of it to him/her?

Think about the expense we incur re-mailing bills. You actually save company money and customer frustration when a Bill goes to the customer the first time it's mailed. This is one way for you to show your focus is on the customer.

Read

Have the participate read the Bill Name And Address (BNA) Screen pages in their Handouts. This section describes the BNA Screen, how it is accessed, the rules for entering address information, how it is updated and the effect these actions have on SCORS and TELSAM.

Address Participants' Questions

Upon completion, answer any questions the participants may have.

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ASSORTED CONTACTS

ESTIMATED TIME

Class Duration

The estimated time for completion of this material is 3 hours.

ADVANCE PREPARATION

Verify Local Guidelines

Check with the local office and determine the following:

- When it is necessary to note the bill on duplicate bill requests.
- How or if accounts are noted when customers are referred to other departments.
- How correspondence is closed and filed.
- Which form is used in your participant's area for noting commitments. Be prepared to advise participants commitment intervals for their area. Determine how closed key time is obtained to meet commitments.
- *COLLECTION CENTER CLASS* -- How listed address and/or service address correction orders are passed to the Customer Support office.

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DIRECTORY DELIVERY ADDRESS (DNA) SCREEN and DIRECTORY INFORMATION (DIR) SCREEN

Introduction

What happens if a customer needs to locate a local telephone number and he/she doesn't have a directory? You can save a customer from becoming frustrated by ensuring the directory goes to the customer when requested. The company also saves money when it is mailed to a correct address. This is another way for you to show your focus is on the customer.

Read

Have the participants read the section entitled Directory Delivery Address (DDA) Screen and Directory Information (DIR) Screen.

If teaching a Collection Center Class, have the participants skip the information regarding ordering directories.

Review

Upon completion, review the items below with the participants:

- How to make a change on the DDA Screen. *Enter an X in the IDDA field and type over or space out information. After completing the changes, depress the PF6 function key. The system automatically gives SCORS credit and makes a Memo notation.*

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REFERENCE MATERIAL

Available Material

An Operating Standard and OLD is available for the following subjects:

- Annoyance Calls
- TouchStar®
- MOBI
- MOOSA

The Regional BOCRIS Users Guide provides information on the BNA, DDA and DIR Screens.

PREREQUISITES

Prior Knowledge

Participants should have completed the prior lesson concerning the BOCRIS bill.

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DUPLICATE BILLS and MECHANIZED ONLINE BILL INQUIRY SYSTEM (MOBI)

Introduction

Customers request copies of bills for many reasons. Some bills get lost in the mail, some are lost after received and others are paid then misplaced when needed for recording purposes. Customers will call your office and request copies of bills when needed.

Read

Have participants read the Handout pages entitled Duplicate Bill and Mechanized Online Bill Inquiry System (MOBI).

Review

Upon completion, review and discuss both systems.

- Access MOBI and demonstrate using the PF10 and PF9 keys in MOBI. Ask the participants to point out the similarities of the first Bill Screen in MOBI versus the Bill Screen in BOCRIS.

- Provide the participants with the LTERM address for printing from MOBI. Print a bill from both systems. Have the participants spend several minutes comparing the two bills. Stress the importance of printing bills without Credit Information when sending bills to customers.

- Provide the duplicate bill charge for participants in Florida, Georgia and South Carolina.

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LESSON

INTRODUCTION

Overhead

Begin this lesson by covering the objectives on the overhead.

Lesson Overview

In this lesson, we will talk about:

- Updating the address to which a bill is sent and sending customer's duplicate bills when needed.
- Updating the address to which directories are sent and send additional books when needed.
- Handling commitments and correspondence.
- Handling situations where a customer is receiving annoying calls.
- Handling situations where a customer's telephone is out of order.

Distribute

Provide each participant with a lesson Handout.

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HANDLING COMMITMENTS

Introduction

Sometimes when customers call, we are unable to handle their requests on the original call. When this happens, a commitment is made to re-contact the customer.

Read

Have participants read the Handout pages entitled Handling Commitments.

Stress

When a commitment is made to a customer, the Company's reputation is at stake. You must ALWAYS meet your commitments by the time agreed upon with the customer.

Advise participants the appropriate commitment interval for their area and appropriate letters.

Demonstration

With you acting as the Rep/Specialist and participants acting as the customer, demonstrate the proper way to make a commitment with a customer, note the Bill, and note the commitment form. To ensure the correct SCORS credit is taken, stress the importance of noting the account with the correct Type Code for the nature of the call.

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Review

Upon completion, review the items below with the participants:

- The command used to access the BNA (Bill Name and Address) Screen and where it is entered. *Type *BNA on the Message Line and depress PF6.*

- The BNA Screen is used to correct or change and address to which a bill is mailed. *Type over or space out information. After completing the necessary changes, depress the PF6 function key. Once the PF6 key is depressed, the system automatically takes you to the DDA Screen, gives SCORS credit and makes a Memo notation.*

Advise

The BNA Screen prompts to **"VERIFY CSR LA/SA WITH CUSTOMER"** each time it is accessed. Reps/Specialists should access the CSR and verify the listed and/or service address is correct.

This information feeds the 911 database. If the address is incorrect, a service order **MUST** be issued. A Customer Support Specialist should handle accordingly. Advise the Specialist they will learn how to issue the correction order in a later lesson. If teaching Collection Center Reps, advise them how to pass the correct information to a Customer Support Specialist.

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CORRESPONDENCE

Introduction

Customers send us ALL types of correspondence.

Correspondence is a customer contact! It should be handled with the same high standards and professionalism as a call from a customer.

Read

Have the participants read the Handout pages entitled Correspondence.

Advise

Tell the participants how correspondence is attached to a file sheet and the procedures for collection of closed out correspondence. Discuss where closed out correspondence is filed and how it is retrieved when necessary.

Provide participants with any local practices for noting accounts. Demonstrate the notation on the Large Sample Bill or a TDB account. The note should include the date of the bill that is being re-mailed. Have participants TNT the account when appropriate.

Exercise

Distribute actual returned bills. Have participants work in groups, decide what action needs to be taken, call the customer if necessary, make all appropriate notations and re-mail the bill.

Remind participants to always verify the DDA and update when appropriate.

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- How and when to use the DDA (Directory Delivery Address) command and where it is entered. *Type *DDA on the Message Line and depress PF6. This command is used when the BNA does not need to be updated.*

- How to order replacement **local** directories. *Enter the number of additional directories the customer wants in the CUR DEL column beside the appropriate directory name and depress PF6. Only local directories can be ordered from this screen. Before ordering directories within the extended local calling area, the CSR should be accessed and reviewed for an applicable extended local calling area plan.*

- How to change the number of local directories delivered yearly. *Enter the total number of directories the customer wants in the IDEL column beside the appropriate directory name and depress PF6.*

- How to order directories not listed on the DDA Screen. *Advise the customer to call toll free 1-800-682-4000.*

Stress

Each time the BNA Screen is updated, the Rep/Specialist MUST verify the Directory Delivery Address with the customer. Any changes and/or corrections must be made at that time to ensure proper delivery of the telephone directory.

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BUSINESS REPAIR CENTER

Distribute	Provide a local directory to each participant. During their reading, they will be instructed to locate the information provided regarding the Repair Center.
Read	Have participants read Handout pages entitled Business Repair Center. Upon completion, answer any questions the participants may have.
Advise	Participants are to access the customer's records when a call is received concerning a repair problem before referring them to the Repair Center. Don't overlook the possibility the reason the customer is having a problem could be due to denial or cancellation of the service. The status indicator will be a **D** when the service is denied.
Exercise	If practice of handling Repair calls is needed, have participants pair, select LIVE accounts, and rehearse typical Repair calls.

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Stress

When the CB or PO command is used and the printed screens/pages are no longer needed, these screens/pages MUST be shred. Do **NOT** place them in the trash can. Remember, they contain proprietary information!

Duplicate Bills should only be sent to the Billing Address on the account. Requests to mail duplicate Bills to an address other than the Billing Address should be referred to their Team Manager for assistance.

Advise

Describe the local procedures for requesting duplicate Bills that are not available in MOBI and can be obtained from microfiche. These copies should be requested from the CCMG.

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PRESENTATION MASTERS

OVERHEAD

ACCOUNT ANALYSIS

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Account Analysis

Learning Advisor Guide
SB100 - Lesson 6

May 1995

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Throughout this material, personal pronouns are used to refer to customers, trainees and other individuals. This was done to improve readability and is in no way intended to discriminate against persons of either sex. Nothing in this material should be construed to indicate a discrimination because of race, color, religion, sex, age or national origin.

TRANSMITTAL

File Code	470.0600
Date	May 15, 1995
Attached	Course SB100, Lesson 6 - Account Analysis LAG - In its entirety (Dated 05/95) Handout - In its entirety (Dated 05/95)
Cancels	Course SB100, Lesson 6 - Account Analysis LAG - In its entirety (Dated 11/94) Handout - In its entirety (Dated 11/94)
Includes	• Re-formatted lesson. • Added objectives overhead. NOTE: Incorporates all information available through May 1, 1995.
Effective Date	Upon receipt.
Respondent	Vickie Capuzzo, 205 945-2031

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Vickie Capuzzo
Room 202
65 Bagby Drive
Birmingham, Alabama 35209
205 945 - 2031

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How can we improve the material?

Additional comments:

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Was the material easy to understand?

Please circle: Yes or No

If no, please explain:

One of our goals in training is to keep material brief, to the point and yet cover all topics adequately. Did this training meet that goal?

Please circle: Yes or No

If no, please explain:

FEEDBACK FORM

Course & Lesson Number SB100, Lesson 5 - What The Computer Does For You

Date of Course/Lesson 05/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating**:

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

_____

_____

_____

_____

What information are you getting in this course/lesson that you don't need?

_____

_____

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_____

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CREDIT INFORMATION

INTRODUCTION

ESTIMATED TIME

Class Duration

The estimated time for completion of this material is 3.0 hours.

ADVANCE PREPARATION

Make Overhead

Make an overhead from the paper copy at the end of this guide. (OH 1)

Review Handbook

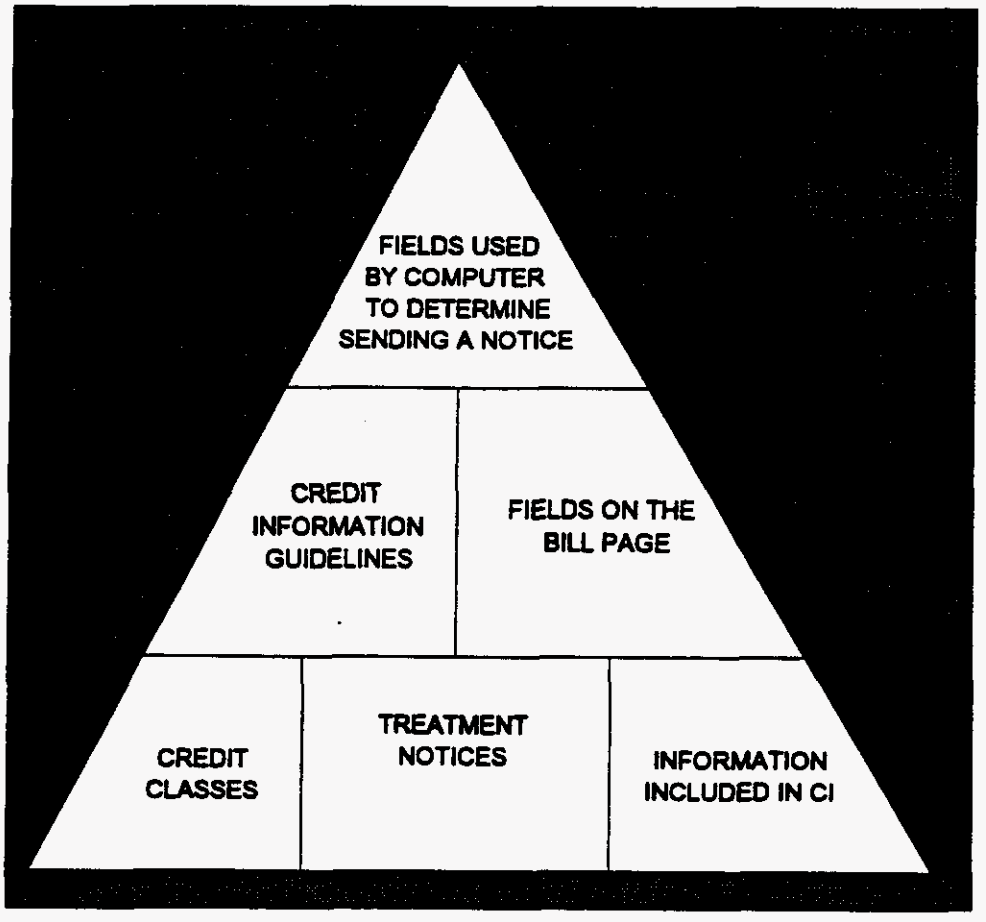
Locate and review, in the Handbook, information relating to Credit Information. (This information is available in some states and not in others.)

Check With Local Office

Determine how Social Security Number Consent is handled locally when two or more Social Security Numbers appear on the records.

Prepare For Optional Activity

Prepare the pyramid for the $100,000 Pyramid activity in this lesson. Draw the pyramid on an easel sheet in bright colors. (*An example is provided below.*) Cover each category with a Post-It Note or construction paper. ("Hold-It" works well.) Prepare 4 - 5 questions for each category and assign an equal point value on each question within a category. This review covers all information in Lesson 1 - 7 of SB100.



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Materials /Supplies

Locate the following for use with this lesson:

- Large Sample Bill
- Easel/paper
- Small minute timer or stop watch for the "Pyramid"activity (Optional)

REFERENCE MATERIAL

Available Material

An Operating Standard regarding Credit Information is available.

PREREQUISITES

Prior Knowledge

Participants should have completed prior lessons in this course.

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OBJECTIVES

At the conclusion of this lesson, students will be able to:

- Identify and explain the Credit Information field.
- Update Credit Information, when appropriate.
- Ask appropriate questions to update Credit Information.
- Enter new Credit Information in BOCRIS.
- Ask questions to determine if a customer's Social Security Number can be provided to his/her Long Distance Carrier.
- Update the Social Security Number field to indicate a customer's response to Social Security Number Consent query.

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LESSON

INTRODUCTION

Objectives

Begin by covering the lesson objectives on the overhead.

Overview

When customers apply for telephone service, they are, in a sense, applying for an unlimited charge account. After the service has been used, nothing can be repossessed.

Therefore, we need evidence of the customer's willingness and ability to pay. We tactfully secure Credit Information by telephone to fulfill this requirement.

When a customer places an order for new service, the Specialist asks specific questions to help determine the initial Credit Class to assign. The information obtained is entered in the Credit Information section of the order. Once the service is established, this information is maintained on the customer's a account.

Accurate Credit Information is essential and almost the only link we have to collecting a Final Bill. Once the bill is Final, it is too late. Credit Information must be kept current when the account is Live.

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You are responsible for updating this information in the following situations:

- The Credit Information Verified field shows a date 6 months old or older.
- The customer indicates a change has occurred.

Large Sample Bill

Point out the location of the CI (Credit Information) and CIV (Credit Information Verified) fields. Explain the type information contained in each.

Distribute

Provide each participant with a copy of the lesson Handout.

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THE CREDIT INFORMATION FIELD

Read

Have the participants read the Handout pages entitled The Credit Information Field.

Ask

Answer any questions the participants may have.

Advise

It is very important to verify Credit Information every six months, regardless of the status of the account, or when the customer indicates there is a change in the information.

Remember to help you recognize when it is time to update Credit Information, the CIV field will automatically highlight on the sixth month.

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TYPES OF OWNERSHIP

Purpose	The Handout will teach participants what information is to be entered in the Credit Information field for each type of business ownership.
Read	Have participants read Handout pages entitled Types Of Ownership.
Ask	Answer any questions the participants may have.

SPECIFIC CONTACT INSTRUCTIONS

Explain	A customer may request we discuss his/her account only when a "Secret Code" is provided. By adhering to these special instructions, we can meet our external customer's expectations and needs.
Read	Have participants read the Handout pages entitled Specific Contact Instructions.
Advise	A Memo notation will be generated each time the ISC or OSC command is used. Always close the contact by thanking the customer for providing the information needed to keep our records current.
Ask	Answer participants questions.

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THE CREDIT INTERVIEW and CREDIT INFORMATION VERIFIED (CIV)

Read	Have participants read Handout pages entitled The Credit Interview and Credit Information Verified (CIV).
Ask	Answer any questions the students have upon completion.

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SOCIAL SECURITY NUMBER CONSENT

Explain

Long Distance Carriers have asked BellSouth to provide customers' Social Security Numbers to them. Before BellSouth can provide this information to the customer's Carrier, we must have the customer's permission.

Customers are asked for consent when placing an order or when Credit Information is being updated. If the customer objects at any point, consent is not pursued.

Social Security Number Consent should only be obtained from the person responsible for the payment of the account. This is the person for whom we have his/her Social Security Number listed on the account.

Read

Have participants read Handout pages entitled Social Security Number Consent.

Explain

Consent information will be retained in the Bill section of the Customer Service Record (CSR). It will be floated behind the Social Security Number. Once the customer has been asked for this information, it is not necessary to verify again unless the party responsible for the bill changes.

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On accounts with multiple Social Security Numbers, ask for consent of the party to whom you are speaking. If more than one Social Security Number appears on the records, do not ask to speak to the owner of the other Social Security Number. However, an "X" should be entered following the other Social Security Number(s).

Multiple Social Security Numbers

Social Security Number Consent is noted on the additional Social Security Numbers via a Record (R) order. Advise students local procedures for passing service order information to the appropriate office.

If teaching a Customer Support Specialist class, advise students they will learn how to issue record orders in a later lesson.

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REVIEW/PRACTICE

Demonstration

On the Sample Bill, demonstrate how the CI field is updated using appropriate Credit Information factors for the students' area and standard abbreviations.

For example:

SO JAMIE BYRD ORS 453-2345 TRT SCTRY TINA @ 564-3452

This Credit Information tells the reader Jamie Byrd is the sole owner of the business and has a residence number of 453-2345. We are to call and treat the secretary, Tina, at 564-3452 for the bill payment.

Instructions

The Review/Practice Handout pages provide the participants an opportunity to format Credit Information with the 120 character limit.

Have them complete this exercise now. Remind them of the abbreviations this lesson has introduced as well as the standard abbreviations they previously learned.

Debrief

Have students compare their responses. (You may board the responses on the Sample Bill.)

Terminal Practice

Using the following TDB accounts, have participants break into Learning Partners and interview each other for updated Credit Information and Social Security Number Consent. They are to make up their own realistic situations.

Training Data Base Accounts

The following accounts are available for this practice:

- 0660
- 0692
- 0711
- 0062
- 1000
- 0370

SUMMARY

$100,000 PYRAMID ACTIVITY

Note To The Learning Advisor

This activity will reinforce learning from the Lessons 1 - 7 of SB100. Use the pyramid and questions prepared before class.

Instructions

Divide students into two teams. Have each team select a "captain". The remaining team members will discuss the answers and the "captain" will call out the answer. Flip a coin and decide which team will chose a category first.

Uncover the category requested by the team. Ask the team all the prepared questions for that category. Each team should be given 2 - 3 minutes to answer all the questions in a category.

The team may pass a question if they are having trouble and return later if time allows. Award points as questions are correctly answered. Continue with the next team selecting a category until all are revealed.

The team with the most points WINS! Reward the "clue receivers" with a small prize.

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PRESENTATION MASTER

OVERHEAD

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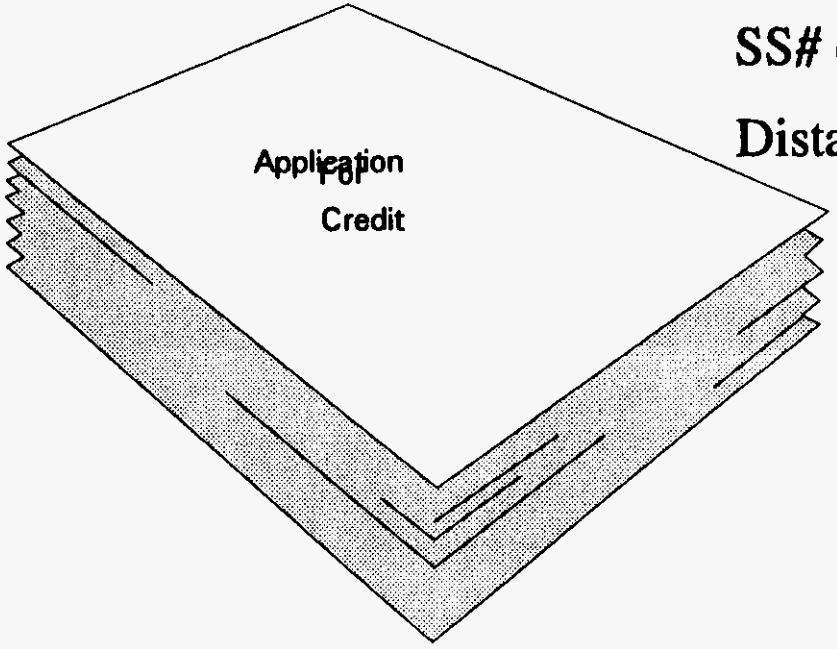
Credit Information

- Identify and explain the Credit Information (CI) field.
- Update Credit Information.
- Ask appropriate questions to update Credit Information.
- Enter new Credit Information in BOCRIS.
  - Ask questions to determine if a customer's SS# can be provided to his/her Long Distance Carrier.
  - Update the SS field to indicate a customer's response to SS# Consent query.



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Room 202
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205 945 - 2031

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Are you able to teach this course/lesson in the sequence in which it is written? If not, explain how it works best for you.

Was the material easy to understand?

Please circle: Yes or No

If no, please explain:

One of our goals in training is to keep material brief, to the point and yet cover all topics adequately. Did this training meet that goal?

Please circle: Yes or No

If no, please explain:

How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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Assorted Contacts

- Update the Billing Name and Address and the Directory Delivery Address Screens.
- Handle requests for local directories.
- Send duplicate bills.
- Understand how to handle commitments.
- Understand how correspondence is handled.
- Handle referrals to Repair Service and know how local service is credited due to out of service conditions.

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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 4 - Assorted Contacts

Date of Course/Lesson 04/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating:**

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

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What information are you getting in this course/lesson that you don't need?

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WHAT THE COMPUTER DOES FOR YOU

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What The Computer Does For You

Learning Advisor Guide
SB100 - Lesson 5

May 1995

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WHAT THE COMPUTER DOES FOR YOU

GETTING STARTED

ESTIMATED TIME

Class Duration

The estimated time for completion of this lesson is 3 hours.

ADVANCE PREPARATION

Make Overheads

Make overhead for the following:

- Objectives (OH 1)
- Corporate Values (OH 2)
- Collection Policy (OH 3)

Make Flash Cards

Cut out the Bill field flash cards included at the end of this lesson. These may be reproduced onto colored paper for better presentation.

Cut out each Treatment and Return Check History field. Attach each to a 5 X 7 index card or construction paper.

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Obtain Training Aids

Obtain and assemble the following for delivery of this lesson:

- Computer Tent cut-out *
- Large Sample Bill *

** The Computer Tent cut-out and the Large Sample Bill can be ordered through:*

Training Manager
Room 203
65 Bagby Drive
Birmingham, Alabama 35209
205-945-2339

Preparation For Review/Practice

Select 2 - 3 Live treatable accounts per participant if you plan to use the Optional Learning Activity. These accounts may be obtained from a Critical Treatment Review List or the User ID Productivity Report Screen.

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Pre-board a complete computer notation or draw a mind map of the collection activity from the RB Date through non-pay disconnect. (*A Collection Rep that handles Final Bills could help you locate examples. Note: This should be an account that is completely handled by the computer.)* Below is an example of notations created in BOCRIS.

```
DATE  TYPE  NOTATION                                          FU    ACTUSERID

MMDD  DISX                                                    MMDD  DIST6V236FC
MMDD  MCCX  +PDL, PAY-BY MMDD                                 MMDD  TNPT6V234HB
MMDD  TDY   MMDD   SHAK  CW3H45                              MMDD  PDLT6V753DR
MMDD  MISX  085934 TREATED                                          ***T6V843FE
MMDD  TSO   LW FOR MR SMITH                                   MMDD  DBTT6V843FE
MMDD  REF   SNP   $$$.$$                                            ***RI12345
```

REFERENCE MATERIAL

Available Material

The Regional Treatment Operating Standards are available for additional information dealing with collection of regulated and unregulated charges.

Information regarding all BOCRIS Bill fields is available in the BOCRIS Reference Guide.

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PREREQUISITES

Prior Knowledge

Participants should have completed prior lessons in this course.

OBJECTIVES

At the conclusion of this lesson, participants will be able to:

- Employ BellSouth Corporate Values and Collection Policy in collection decisions.
- Recognize collection fields on the Bill which are automatically populated by the computer.
- Identify when an account is treatable.
- Identify when a Service Interruption Notice (SIN) has been/will be sent.
- Identify when an Unregulated Payment Due Notice (UPDN) has been/will be sent.
- Identify when a Carry Over Treatment Denial Notice (CTD) has been/will be sent.

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LESSON

INTRODUCTION

Objective

Begin by covering the lesson objectives on the overhead.

Overview

Refer participants to the overhead and show the Corporate Values and Collection Policy. *Use this information to overview the lesson.*

- Emphasize the relationship of the Values to the Collection Policy, how the policy is built on the values.
- Explain that treatment is an acronym for collection activity.

Distribute

Provide each participant with a lesson Handout.

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BOCRIS BILL COLLECTION FIELDS

Purpose

The following is an exercise which provides instructions concerning the automatic collection functions the computer performs. Only the fields on the Bill and Memo Screens pertaining to collections and fields populated or affected by the computer are addressed.

Training Aids

Place the Computer Tent Card in a location with easy access to all of the participants. In the middle of the tent card, place the flash cards with the Bill fields information.

Place the large sample Bill in an accessible location.

Bill Field Activity

Refer the participants to Handout pages entitled BOCRIS Bill Collection Fields. The items on the Mind Map align with the flash cards which have been placed in the computer tent card. Participants are to write out the purpose of each field in the space provided in their Handouts.

Selecting the cards one at a time, have each participant draw a card until all cards are evenly distributed.

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Following the sequence of the Handout Mind Map, have the participant with "PB" begin first. *This is **VERY** important so the explanations will build on each other!*

Using the information provided, the participant should:

- explain the meaning of the field.
- describe how and when the computer reacts to the field.
- identify the field for the class on the Sample Bill.

Review Questions

Divide participants into two groups. Each group should prepare 5 questions concerning the collection fields they presented.

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Collection Field Learning Activity	To review, use the questions prepared by the groups in the previous activity. This can be done by playing Tic-Tac-Toe with one group represented by the "X" and the other team by the "O". Make sure each group receives questions prepared by the opposite group. The middle square should be won by answering two questions. If more rules are needed, make them up. Have fun!
Debrief Activity	The purpose of this activity is to verify the participants' understanding of the Bill fields. Debrief the activity so participants will understand why a "game" is included in training.

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TREATMENT NOTICES

Special Instructions

The Handouts give the wording of the three automatic treatment notices sent by the computer. Two versions of the Service Interruption Notice and the Unregulated Payment Due Notice are included. The second version for these apply *only* to South Central Bell A and B Credit Class customers. In a Southern Bell class, be sure the participants understand these notices are not applicable.

Carry Over Treatment

Explain Carry Over Treatment to the participants. Using the Large Sample Bill, point out the BOCRIS Bill field where Carry Over Treatment is shown (in the NT field).

*When an account is treatable one month and this amount is not reduced below the RTA **before** the next bill is generated, the outstanding amount is carried over to the next month's bill as a balance. This situation causes the NT field to be populated with the FID CT followed by a number. The number indicates the number of months the account has been in Carry Over Treatment.*

For example, the NT field could be populated with CT2 meaning the account has been in Carry Over Treatment for two months.

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An account may be in Carry Over Treatment through no fault of the customer. When a claim is pending and not quickly resolved, a balance can accumulate causing an account to be classified as being in Carry Over Treatment.

*When handling claims, it is **VERY** important to TNT or PNT an account so treatment notices will not be sent. A detailed note explaining why the account is TNT or PNT must also be made.*

Ask

As a customer, how would you feel about receiving a notice advising your service was about to be interrupted because you had not paid a bill for charges you felt you did not owe?

If this happened to our customers, what is their opinion of us? Will we remain their provider of choice?

Read

Have participants read the Handout pages entitled Treatment Notices. Ask them to pay close attention to each notice's description included in the table.

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Review

Ask the following questions to be sure the participants understand the differences in the notices.

- *Which notice is sent when an account is treatable but the outstanding charges are not deniable?* The Unregulated Payment Due Notice (UPDN) is sent when the total amount due is greater than or equal to the STA and the regulated charges are less than the RTA.

- *As far as denial of service, what is the difference between regulated and unregulated charges?* Regulated charges are charges for which we can deny a customer's service: local service, tariffed installation charges, etc. We **cannot, must not ever** deny a customer's service for any unregulated charge! These include inside wiring, MemoryCall® Service, Directory Advertising, etc. We can pursue collection in full of these unregulated charges and, if necessary, stop providing the service for which the charge is billed.

- *Which notice is sent on the RA Date when the total amount due is above the STA and the **regulated** charges are greater than or equal to the RTA?* The customer will be sent a Service Interruption Notice (SIN).

- *Which two notices advise denial/interruption of service?* The Service Interruption Notice and the Carry Over Treatment Denial Notice (CTD) both advise denial of service.

- *What does the SIN advise the customer?* The notice advises the total amount due but not the exact amount of the regulated charges. The amount of the regulated charges is the amount the customer must pay to prevent denial of service. The customer can call and request this information from a Collection Rep or Specialist. This provides an opportunity to make payment arrangements. To determine the amount for which service can be denied, check the **DEN** field of the Memo Screen. The computer automatically does this on the RA. If the remaining amount is equal to or above the RTA, the computer will send a SIN.

- *What does the UPDN advise?* It reminds the customer of his/her obligation to pay the TOTAL amount due and advises the exact amount of the regulated and unregulated charges. The computer automatically figures these amounts on the RA Date. If the total amount due is above the STA and the **unregulated** amount is greater than or equal to the RTA, the computer will send the customer an UPDN.

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- *When an UPDN notice is sent, does the customer owe only unregulated charges?* No, the customer may still owe a non-treatable amount of regulated charges and receive an UPDN.

- *When will the system send a Carry Over Treatment Denial Notice on the RA Date?* A CTD will be sent when the *total* amount due (the balance carried over from a previous bill plus the current charges) includes **regulated** charges that are above the RTA and the account has been in Carry Over Treatment status three months or less. (If the account is in Carry Over Treatment more than three months, the account will be entered into OLT for manual handling by the Collection Center.)

- *Did you notice the CTD advises the exact total amount due but advises the service can only be interrupted for non-payment of the regulated charges?* The CTD reminds the customer of his/her obligation to pay the TOTAL amount due. However, only the regulated charges must be paid to prevent interruption of service. Denial of service is advised. The notice does include the amount of regulated or unregulated charges.

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TREATMENT HISTORY (TRT) AND DISHONORED CHECK HISTORY (RCK)

Read

Have participants read the Handout pages entitled Treatment History and Dishonored Check History. Participants are to also complete the written exercise.

Exercise Answers

The correct responses for the written exercise are shown below:

0 *- No Treatment*
1 *- TCL Referral or UPDN Notice*
2 *- TCL Treatment or TCLA Notice*
3 *- Reminder Notice/Call or URB Referral*
4 *- Denial Notice, TCLD Notice, or a Carry Over Treatment Denial Notice*
5 *- SNP Referral*
6 *- SNPE Referral*
7 *- Denial of Service*
8 *- Non-Pay Disconnect*
9 *- Restoral charge waived after denial, discretionary measure*

Review And Ask For Questions

Review the participants' answers and address any questions they may have.

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TRT & RCK History Exercise

Using the Computer Tent Card, place examples of the Treatment History and Dishonored Check History in the slot.

Select a participant to be first. (All participants will take turns explaining either a treatment or dishonored check history.) Have participants choose cards from the computer and explain the history that appears. Make sure the history is explained by month right to left.

Suggestions for selection of participants: Determine whose birthday comes first in the year, whose is second, etc. The participant with the earliest birthday will go first and will explain a history. Other participants will take turns in the order of their birthdays.

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REVIEW/PRACTICE

The Collection Process

This exercise will help explain the collection process. Use the pre-boarded BOCRIS notations demonstrating a typical account on which a SNP was received and was subsequently non-pay disconnected.

Discuss each step shown.

Collection Fields Exercise

If more practice identifying collections fields is needed, use the pre-selected Live accounts. Pair participants and have them practice reading the collection fields and determine if a SIN, UPDN or a CTD has been sent.

Spot check for accuracy and be available to answer questions as the participants continue to practice.

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SUMMARY

Discuss

Display the objectives and review.

Review

Review the following:

- The computer will send one of three notices to a treatable account on the RA Date: a Service Interruption Notice, an Unregulated Payment Due Notice or a Carry Over Treatment Denial Notice.
- The Unregulated Payment Due Notice does not advise denial of service. The customer may receive this notice and owe regulated charges.
- Treatment History and the Dishonored Check History fields are read right to left with the most current month represented in the first field.
- The TRT field is filled with numerics which correspond with specific treatment steps. The RCK field is filled with numerics which correspond with the specific number of checks which have been returned from the bank.

Issues

Cover any outstanding issues or concerns.

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PRESENTATION MASTERS

OVERHEADS

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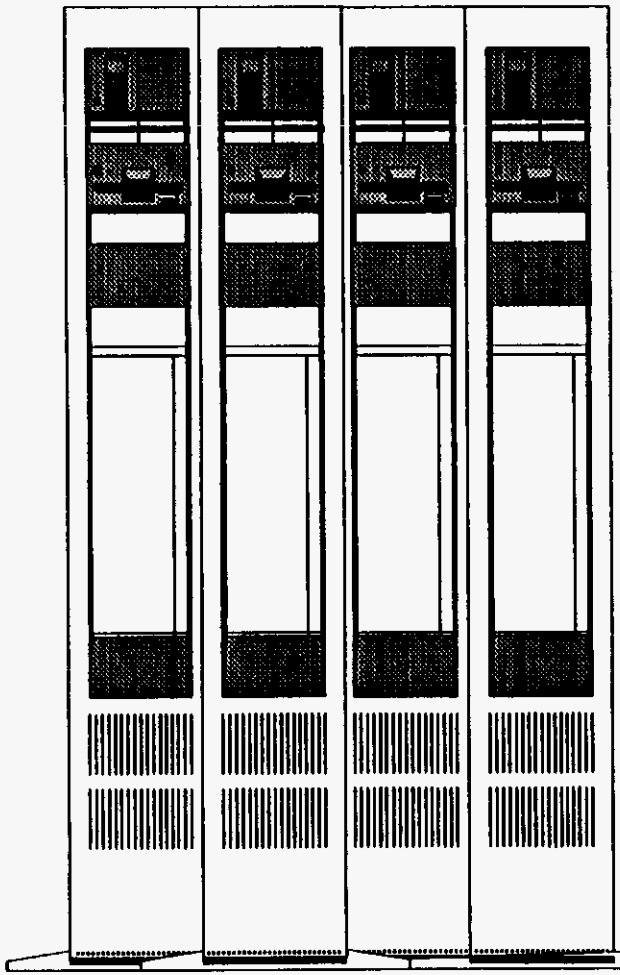
What The Computer Does For You.....



At the conclusion of this lesson, you will be able to:

- Employ BellSouth Corporate Values and Collection Policy in collection activities.
- Recognize collection fields on the bill which are automatically populated by the computer.
- Identify when an account is treatable.
- Identify when a Service Interruption Notice, Unregulated Payment Due Notice or Carry Over Treatment Denial Notice has been or will be sent.

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Collection Policy

To collect the revenue due with the least amount of irritation to the Customer and with the least expense to the Company.

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TRT 000000955578

TRT 765445555555

TRT 001030303465

TRT 444444444444

TRT 021460005444

RCK 210100010000

RCK 100110002122

RCK 001000001111

RCK 000010000010

RCK 002112101021

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BLANK

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ERB

Expected Unregulated Billing

A cumulative total of unpaid unregulated charges on an account that has an expected payment noted in the Memos. This field will change back to URB when the expected payment posts to the account.

RB

Refer to Business Office Date

The date an unpaid treatable "B", "C", or "D" account is reviewed by the computer to determine further treatment action. If further treatment action is needed, the account is entered into OLTS.

RTA

Remove from Treatment Amount

After treatment has begun on an account, the account will be subject to treatment action until the amount due on C & D accounts or the balance for B accounts is less than the Remove from Treatment Amount. The amount due is reduced following the processing of a payment and/or adjustment. When the RTA field is blank, the account is usually not treatable.

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RA

PAYADJ

AMT DUE

Refer to Accounting Date

On the RA for "A" & "B" accounts, treatment begins when the **balance** from last month's Bill, less payments and adjustments, is at a treatable amount. On the RA for "C" & "D" accounts, treatment begins when the **amount due** is at a treatable amount. Credit class "A" accounts are referred to the Collection Center for treatment. Treatment on all other credit classes is in the form of a Service Interruption, Unregulated Payment Due, or Carry Over Treatment Denial Notice sent by the computer. The type notice sent is based on the type and age of money outstanding (unregulated/regulated or balance carried over from previous Bill/current Bill). This is the first date an account is considered treatable by the system.

Payments & Adjustments - Thru/Since Bill

Thru Bill: Credits and debits posted to an account in the previous billing month are listed with their posted date.

Since Bill: Credits and debits posted to an account since the Bill was rendered are listed with their posted date.

Amount Due

The total amount of the Bill including any past due balance, a total of unregulated and regulated charges. This amount will fluctuate as payments and adjustments are posted to the account. When this field is shown, all expected payments have posted to the account.

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STA

Start Treatment Amount

The STA is the dollar amount that has been set when treatment action should begin on an account. This action will be a Service Interruption Notice, Unregulated Payment Due Notice, Carry Over Treatment Denial Notice or referral to the Collection/Account Center for manual handling. When the STA field is blank, the account is usually not treatable.

PB

Pay By Date

The date the account is considered past due, though not yet treatable. This date is shown on the customer's Bill as "PAYMENT DUE BEFORE".

URB

Unregulated Billing

A cumulative total of the unpaid unregulated charges on an account. This amount will fluctuate as payments and/or adjustments are posted to the account. This field is also found just above the FU, ACT, USERID fields on the Memo Screen. When this field is shown, all expected payments have posted to the account.

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EDN

Expected Deniable Amount

The EDN field identifies the cumulative total of unpaid regulated charges on an account that has an expected payment noted in the Memos. This field will change back to DEN when the expected payment posts to the account.

DEN

Denial Amount

The DEN field identifies the cumulative total of the unpaid regulated charges on an account for which an account can be denied. This amount will fluctuate as payments and/or adjustments are posted to the account and appears on the Memo Screen. This field is also found just above the FU, ACT, and USERID fields on the Memo Screen.

EMT DUE

Expected Amount Due

The total amount of the Bill including any past due balance when an expected payment is noted in the Memos. These payments may be paid at a TIPS or TIPS-PA (Mechanized Payment Agencies). This amount includes unregulated and regulated charges. Once the expected payment posts to the account, EMT will change back to AMT.

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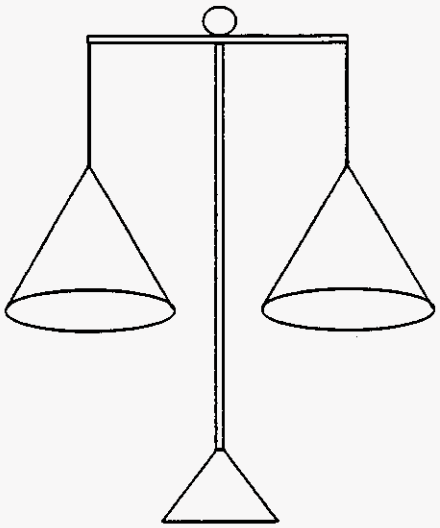
"Judgment" Scales

Draw the Scales of Judgment on an easel or use your imagination to create them. (Example below.) The participants will "balance" the scales with their ideas of what judgment means to them by attaching their definitions of "JUDGMENT" to the scale. This will be used in the Judgment Exercise.



Live Accounts

Select Live accounts for the participants to use with this lesson. These can be obtained from a Critical Treatment Review List, the User ID Productivity Report, or a list made by an experienced Collection Rep as accounts are handled.

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Make Overhead	Make an overhead from the paper copy at the end of this guide. (OH 1)
Locate	A large Sample Bill, a dictionary and index cards will be used in this lesson.

REFERENCE MATERIAL

Available Material	An Operating Standard and OLD is available for Live Treatment.

PREREQUISITES

Prior Knowledge	Participants should complete the prior lessons in this course.

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Credit Information

Learning Advisor Guide
SB100 - Lesson 7

May 1995

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LESSON

INTRODUCTION

Overhead

Begin this lesson by covering the objectives on the overhead.

Lesson Overview

In this lesson you will learn:

- That good judgment is used and must be used when making payment arrangements.
- The authority you have to accept good payment arrangements.
- Accounts are re-classified as paying habits are established.
- Questions to ask yourself as you handle each request for making payment arrangements.

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Definition

Refer participants to the dictionary. Have them check the definitions of "JUDGMENT" and have them discuss any appropriate points not covered in their previous list.

Ask

Is there a difference between judgment and good judgment? What's the difference?

Point out the importance of using good judgment in all collection decisions. Emphasize our goal is to develop their judgment.

It is important to point out the authority the participants will have as a Collection Rep/Specialist. Stress the relationship between having the authority to use their own good judgment and being responsible for their decisions. Exercising good judgment on all customer contacts will have a positive effect on our internal customer as well as our external customer. In future lessons, "JUDGMENT" will play an important role when making wise payment arrangements.

Distribute

Provide each participant with a lesson Handout.

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Credit Information

Learning Advisor Guide
SB100 - Lesson 7

May 1995

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BILL FIELD ANALYSIS

Read	Have participants read the Handout pages entitled Bill Field Analysis.
Ask	Answer any questions the participants may have.
Note	A Final account is mentioned in the material. Advise participants they will learn about handling Final Bills later.

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SUMMARY

Discuss

Have the participants turn back to the objectives in their Handouts and review each objective.

Review

Review the following:

- As a customer establishes paying habits, the Credit Class on the account will be upgraded or downgraded as appropriate.
- BOCRIS Bill fields provide information which must be analyzed when making payment arrangements.

Issues

Cover any outstanding issues or concerns the participant may have.

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Vickie Capuzzo
Room 202
65 Bagby Drive
Birmingham, Alabama 35209
205 945 - 2031

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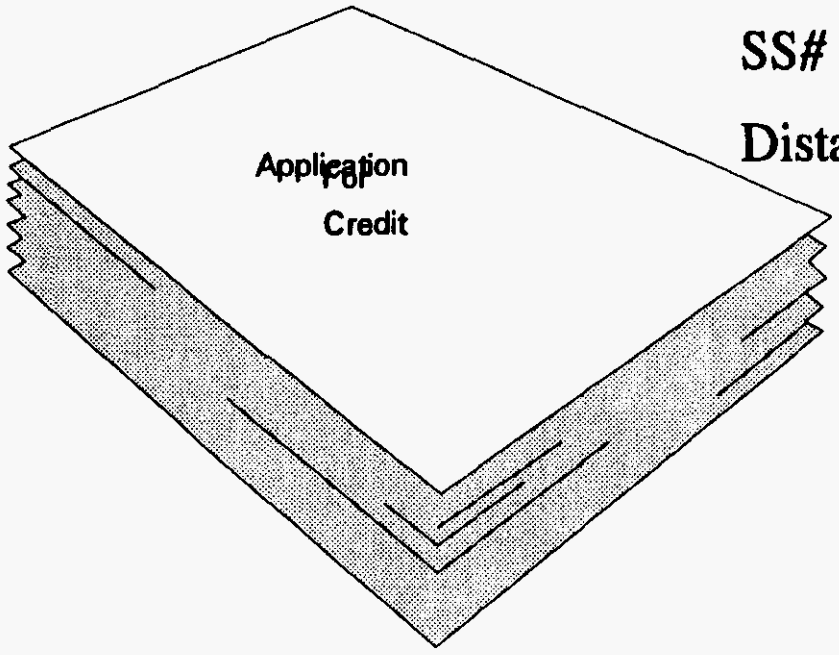
Credit Information

- Identify and explain the Credit Information (CI) field.
- Update Credit Information.
- Ask appropriate questions to update Credit Information.
- Enter new Credit Information in BOCRIS.
  - Ask questions to determine if a customer's SS# can be provided to his/her Long Distance Carrier.
  - Update the SS field to indicate a customer's response to SS# Consent query.



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Are you able to teach this course/lesson in the sequence in which it is written? If not, explain how it works best for you.

Was the material easy to understand?

Please circle: Yes or No

If no, please explain:

One of our goals in training is to keep material brief, to the point and yet cover all topics adequately. Did this training meet that goal?

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If no, please explain:

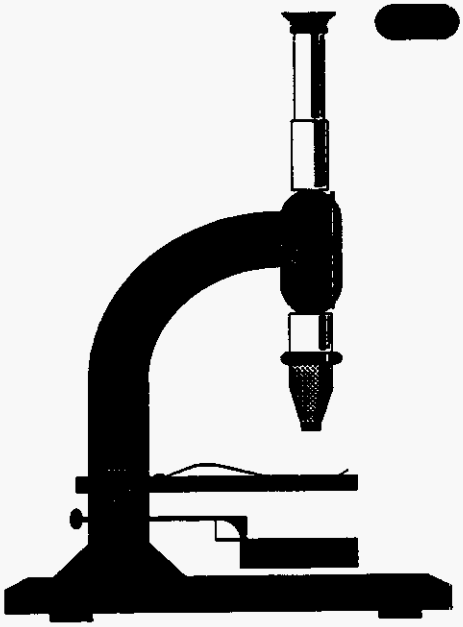
Account Analysis

At the conclusion of this lesson, you will:

- Understand how an account's Credit Class can be upgraded or downgraded.

- Recognize those collection fields on the BOCRIS bill that affect treatment decisions.

- Be able to make treatment decisions based on the collection fields.



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205 945 - 2031

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SUMMARY

Discuss

Have the participants turn back to the objectives in their Handouts and review each objective.

Review

Review the following:

- As a customer establishes paying habits, the Credit Class on the account will be upgraded or downgraded as appropriate.
- BOCRIS Bill fields provide information which must be analyzed when making payment arrangements.

Issues

Cover any outstanding issues or concerns the participant may have.

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BILL FIELD ANALYSIS

Read	Have participants read the Handout pages entitled Bill Field Analysis.
Ask	Answer any questions the participants may have.
Note	A Final account is mentioned in the material. Advise participants they will learn about handling Final Bills later.

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ACCOUNT ANALYSIS

GETTING STARTED

ESTIMATED TIME

Class Duration	The estimated time for completion of this material is 2.5 hours.

ADVANCE PREPARATION

"Judgment" Sign	Prepare a sign that spells "JUDGMENT" to place on the wall. Use eight pages of 8 1/2 x 11 inch construction paper, placing one of the letters that spell the word JUDGMENT on each page. Use bright colors that blend well together. Board prior to beginning this lesson. Leave the JUDGMENT sign up while teaching the collections series.

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Definition

Refer participants to the dictionary. Have them check the definitions of "JUDGMENT" and have them discuss any appropriate points not covered in their previous list.

Ask

Is there a difference between judgment and good judgment? What's the difference?

Point out the importance of using good judgment in all collection decisions. Emphasize our goal is to develop their judgment.

It is important to point out the authority the participants will have as a Collection Rep/Specialist. Stress the relationship between having the authority to use their own good judgment and being responsible for their decisions. Exercising good judgment on all customer contacts will have a positive effect on our internal customer as well as our external customer. In future lessons, "JUDGMENT" will play an important role when making **wise** payment arrangements.

Distribute

Provide each participant with a lesson Handout.

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LESSON

INTRODUCTION

Overhead

Begin this lesson by covering the objectives on the overhead.

Lesson Overview

In this lesson you will learn:

- That good judgment is used and must be used when making payment arrangements.
- The authority you have to accept good payment arrangements.
- Accounts are re-classified as paying habits are established.
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205 945 - 2031

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Make Overhead	Make an overhead from the paper copy at the end of this guide. (OH 1)
Locate	A large Sample Bill, a dictionary and index cards will be used in this lesson.

REFERENCE MATERIAL

Available Material	An Operating Standard and OLD is available for Live Treatment.

PREREQUISITES

Prior Knowledge	Participants should complete the prior lessons in this course.

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CREDIT INFORMATION

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Credit Information

Learning Advisor Guide
SB100 - Lesson 7

May 1995

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TRANSMITTAL

File Code 470.0600

Date May 26, 1995

Attached
Course SB100, Lesson 8 - Arrangements Before The RA Date
LAG - In its entirety (Dated 05/95)
Handout - In its entirety (Dated 05/95)

Cancels
Course SB100, Lesson 8 - Arrangements Before The RA Date
LAG - In its entirety (Dated 12/94)
Handout - In its entirety (Dated 12/94)

Includes

- Changed PIC to a four digit number on the Memo Screen exhibit.
- Re-formatted lesson.
- Added objectives and collection policy overhead.

NOTE: Incorporates all information available through May 1, 1995.

Effective Date Upon receipt.

Respondent Vickie Capuzzo, 205 945-2031

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PRESENTATION MASTER

Overhead 16

OBJECTIVES

At the conclusion of this lesson, participants will:

- Understand how an account's Credit Class can be upgraded or downgraded.
- Recognize those collection fields on the BOCRIS Bill that affect treatment decisions.
- Be able to make treatment decisions based on the collection fields.

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How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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JUDGMENT EXERCISE

Purpose

This exercise will demonstrate what judgment means to each participant and how good judgment should be used on customer contacts.

Instructions

Display the pre-made "Judgment" scales. Divide participants into two teams and distribute several packages of index cards.

On index cards, have each team write what the word "JUDGMENT" means to them. They can use a word, phrase or sentence, one per index card.

Have participants come up with as many definitions as possible. Each team is to attach the cards to their team's side of the scale. The team who "weighs" down the scale will win.

Possible Answers

A list of possible answers is included below. If participants do not come up with the same or similar ideas as those provided, add to the participant's list.

- *Fairness*
- *Looking At All Sides Of An Issue*
- *Compromise*
- *Authority*
- *Responsibility*
- *Adherence To The Rules*

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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 7 - Credit Information

Date of Course/Lesson 05/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating**:

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

_____

_____

_____

_____

What information are you getting in this course/lesson that you don't need?

_____

_____

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_____

_____

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ACCOUNT RECLASSIFICATION

Purpose

This section of the Handout will provide participants with information regarding the upgrading and downgrading of Credit Classes. It also provides instructions on changing a Credit Class and the Treatment History field.

Read

Have participants read Handout pages entitled Account Reclassification.

Ask

Cover any questions the participants have regarding the upgrading and downgrading of accounts.

Advise

Participants should become more experienced before changing a Credit Class on an account. However, they should be aware of the possibility of an incorrectly assigned Credit Class and refer the contact to a Team Manager for help in deciding the correct Credit Class.

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REVIEW/PRACTICE

Purpose

This practice is designed to reinforce the basic principles of analyzing accounts for handling incoming collection calls and determining when an account is being treated for an outstanding bill.

Read

Have participants read the instructions for this practice in their Handouts.

Instructions

Assign Learning Partners and provide them with Live accounts to analyze.

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TRANSMITTAL

File Code	470.0600
Date	March 30, 1995
Attached	Course SB100, Lesson 1 - Common Billing Explanations LAG - In its entirety (Dated 03/95) Handout - In its entirety (Dated 03/95)
Cancels	Course SB100, Lesson 1 - Common Billing Explanations LAG - In its entirety (Dated 10/94) Handout - In its entirety (Dated 10/94)
Includes	• Updated four digit PIC Codes on bill exhibits. • Moved Late Payment Charges and SCORS information to Handout. • Added objectives overhead. • Added regional frequently called number screen, BTN*. NOTE: Incorporates all information available through March 15, 1995.
Effective Date	Upon receipt.
Respondent	Vickie Capuzzo, 205 945-2031

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PRESENTATION MASTERS

OVERHEAD

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How can we improve the material?

Additional comments:

NOTE: After completing, fold and return to address on the back of this page.

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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 6 - Account Analysis

Date of Course/Lesson 05/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

Circle the appropriate **Training Material Overall Rating**:

Poor Fair Good Very Good Excellent

INSTRUCTIONS: After reviewing the attached material, answer the following questions and return as promptly as possible. Attach pages with corrections and references when appropriate.

What information do you need in this course/lesson that is not provided?

_____

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FEEDBACK FORM

Course & Lesson Number SB100, Lesson 7 - Credit Information

Date of Course/Lesson 05/95 Date Reviewed _____

Actual Duration of Course (in hours) _____

Submitter _____ (Optional)Phone Number _____

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OVERHEAD

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REVIEW/PRACTICE

Purpose	*This practice is designed to reinforce the basic principles of analyzing accounts for handling incoming collection calls and determining when an account is being treated for an outstanding bill.*
Read	Have participants read the instructions for this practice in their Handouts.
Instructions	Assign Learning Partners and provide them with Live accounts to analyze.

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ACCOUNT RECLASSIFICATION

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This section of the Handout will provide participants with information regarding the upgrading and downgrading of Credit Classes. It also provides instructions on changing a Credit Class and the Treatment History field.

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Advise

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A list of possible answers is included below. If participants do not come up with the same or similar ideas as those provided, add to the participant's list.

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- *Looking At All Sides Of An Issue*
- *Compromise*
- *Authority*
- *Responsibility*
- *Adherence To The Rules*

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OBJECTIVES

At the conclusion of this lesson, participants will:

- Understand how an account's Credit Class can be upgraded or downgraded.
- Recognize those collection fields on the BOCRIS Bill that affect treatment decisions.
- Be able to make treatment decisions based on the collection fields.

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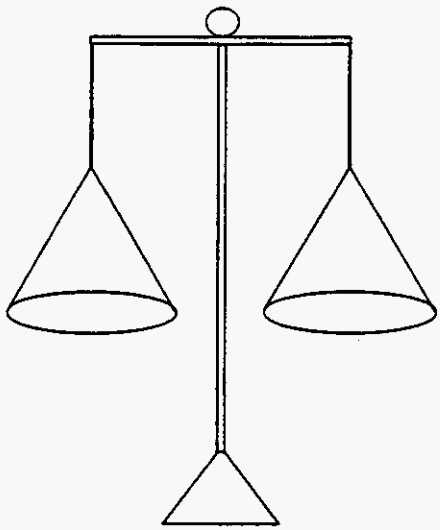

Live Accounts

Select Live accounts for the participants to use with this lesson. These can be obtained from a Critical Treatment Review List, the User ID Productivity Report, or a list made by an experienced Collection Rep as accounts are handled.

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PRESENTATION MASTER

Overhead 16

SB042

HO

BELLSOUTH®

Problem Management
SB042

Handout
Issue 1 - December 1995

Performance Improvement Department

Problem Management

Handout

SB042

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Lesson 1: Introduction to Problem Management

Handout

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Who is Your Customer? - CD Topic 1.3
Focusing on the Customer - CD Topic 1.4
Importance of Problem Management 4
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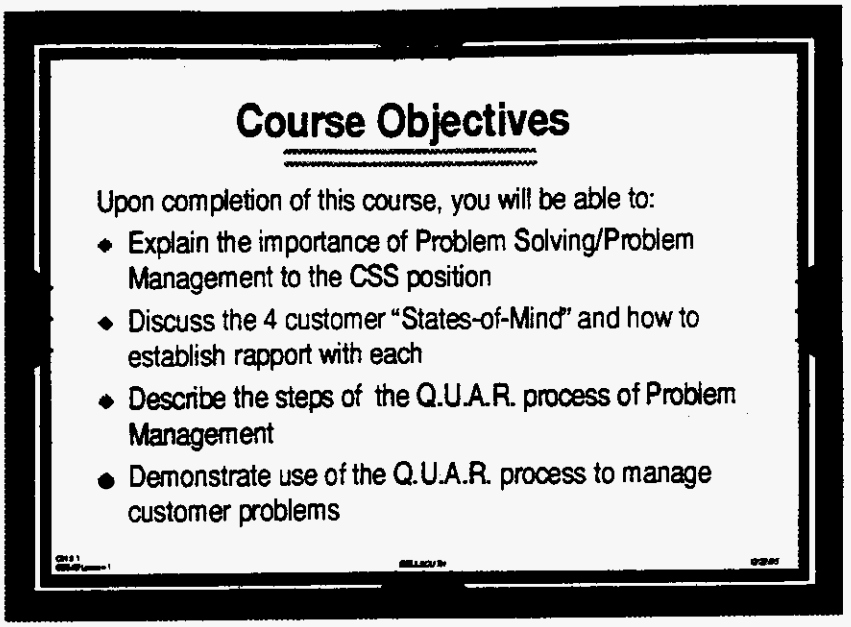
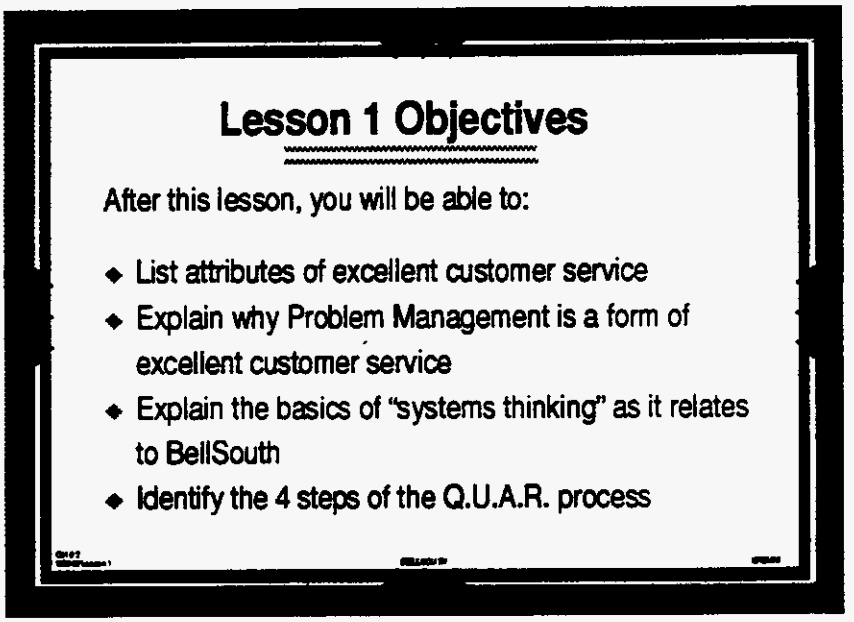
Introduction to Problem Management

Defining Problem Management

Course Objectives



Lesson Objectives



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Customer Service Overview (CD ROM)

Customer Service Is...

Excellent customer service is a key competitive advantage because it *adds value* to our products and services. Added value is so very vital to distinguishing BellSouth's from our new competitors. For us, it truly is "a whole new world."

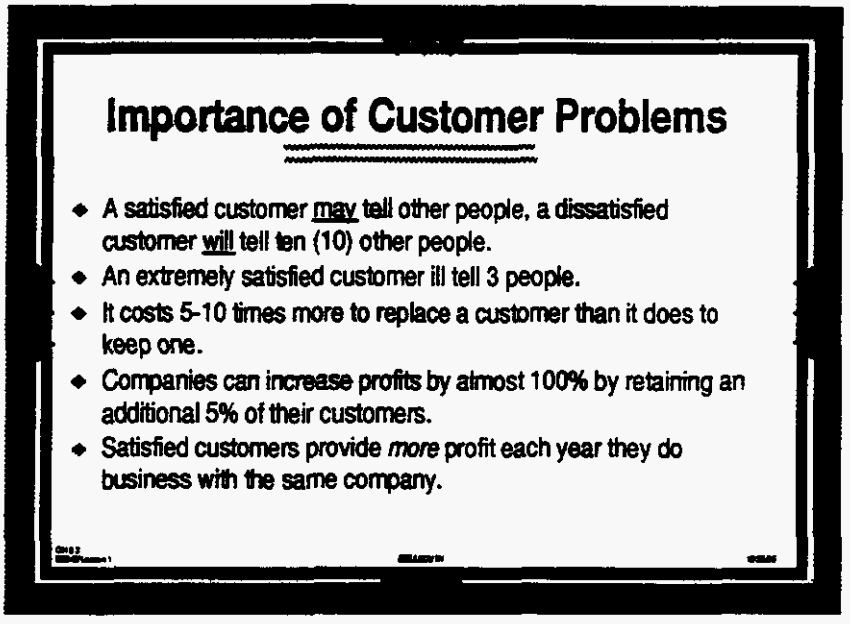
Formally, *Products* Differentiated a Company

Governmental regulations prohibit BellSouth from producing equipment or products. Almost all hardware is produced for us by other companies such as AT&T and Northern Telecom. These same equipment manufacturers are also supplying this same equipment to our competitors.

Level of Service Dictates Quality of Service

The **level** of customer service is what **makes the difference**. A service supplier can choose to exceed a customer's expectations or just do the minimum necessary to meet expectations.

Complaining Customers Are Valuable



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Customer Service Overview (CD ROM), Continued

Complaining Customers Are Valuable (continued)

Summary:

- Displeasing one customer may result in the loss of multiple customers
- You may never know a customer is displeased
- The cost to re-obtain a customer is great (example: the AT&T $50 check offer to return to AT&T)
- A complaining customer points out a possibly unseen weakness

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Importance of Problem Management

Profit From Problems

Problem management or the effective handling of customer complaints is an example of providing excellent customer service.

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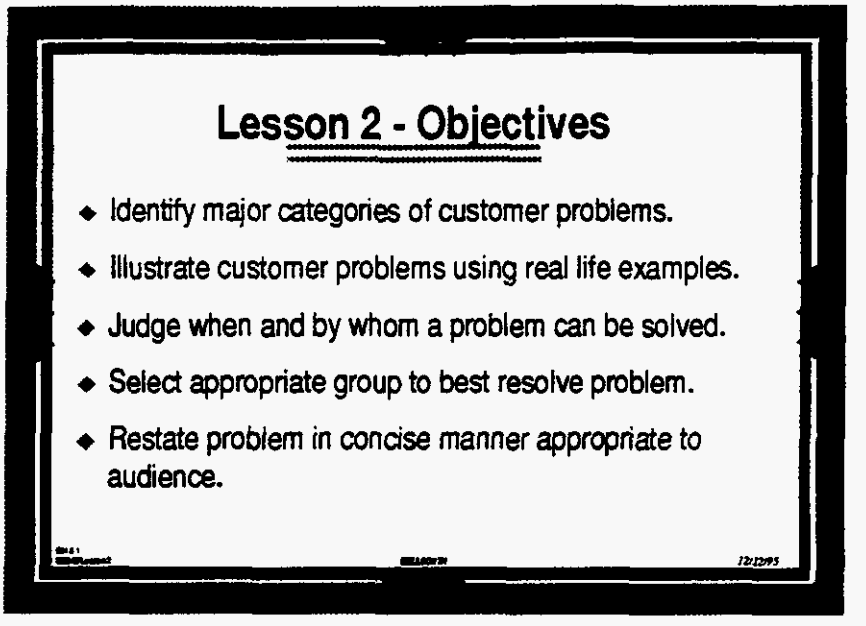
Problem Management Activities

Introduction

Overview

In this lesson you will learn the major categories of customer problems. You will also be able to judge when and by whom a problem should be solved. You will learn to recognize important information necessary to determine cause of problems and if recurring problems.

Objectives



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Introduction, Continued

Problem Management = Customer Service

It is important that you as a Customer Support Specialist understand the importance of being able to recognize customer problems and to be able to resolve them.

Small Business customers now have a choice in local service. BellSouth would like to be the vendor of *choice* for our customers. To do this, we must always be willing to proactively place our customers first. As a CSS, you can best be proactive by solving problems and making sure that we are striving to meet our customers' expectations in all areas of service.

Categories of Customer Problems

The major categories of customer problems are:

1. Missed Appointments

Orders that we have not worked within the timeframe we have committed to the customer. Typically there are three(3) reasons for missed appointments. Each one has its own 2 alpha character identification code.

Subscriber Access (SA) When the subscriber is not at location at the time the order is scheduled to be worked.

Company Load (CL) When we cannot work the customer's order because we have overscheduled the technician's workload.

Plant/Facility (PF) When orders can not be worked due to cabling problems or lack of necessary cable pairs to initiate service.

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Introduction, Continued

Categories of Customer Problems (continued)

2. Directory Advertising Error

- Involves either white or yellow pages
- Incorrect spelling of customer's business name
- Incorrect customer telephone number or address

3. Billing Explanations

The most common billing explanation is:

- Responding to customer questions concerning the "*other charges and credits*" portion of a telephone bill
- Number 1 question is regarding a partial month billing in addition to a full month billing.

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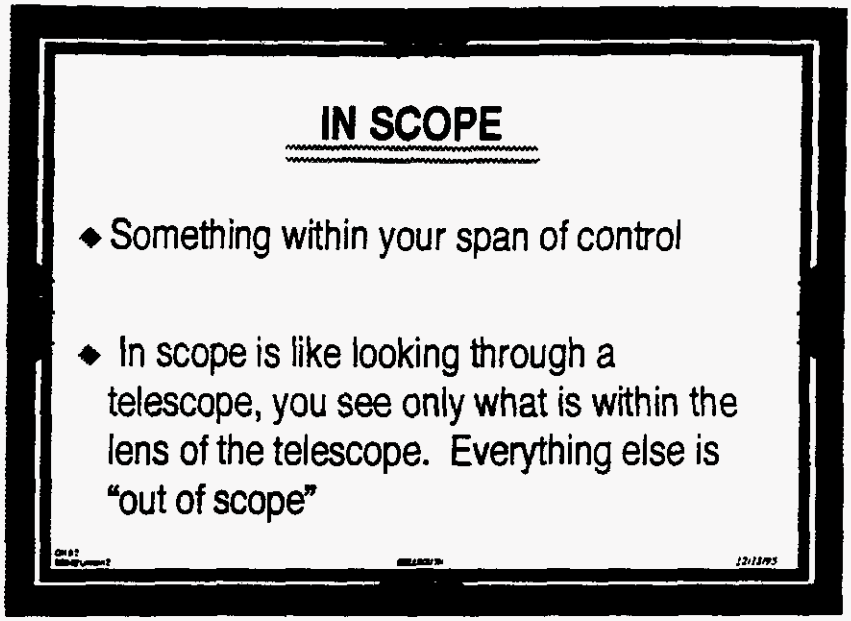
Scope of CSS Problem Management Activities

Problem Management Activities



First Choice: Resolve Yourself

As much as business office management encourages you to resolve as many customer problems as possible without passing them to another person, management also realizes that not all problems are within your ability to resolve.

Only after the parameters of a problem have been identified through questioning and arriving at an understanding of a customer's needs, can a you determine the proper path to resolution.

The "exception" to this general rule of thumb is there may be an occasion when time constraints or other limitations require that you passoff the problem for resolution.

You should always default to the idea that you can resolve or problem solve each customer problem.

Relationship of Problem Solving/ Management

Both problem solving and problem management processes consist of a series of similar actions. It is only after the problem has been properly identified does the path to resolution become clear.

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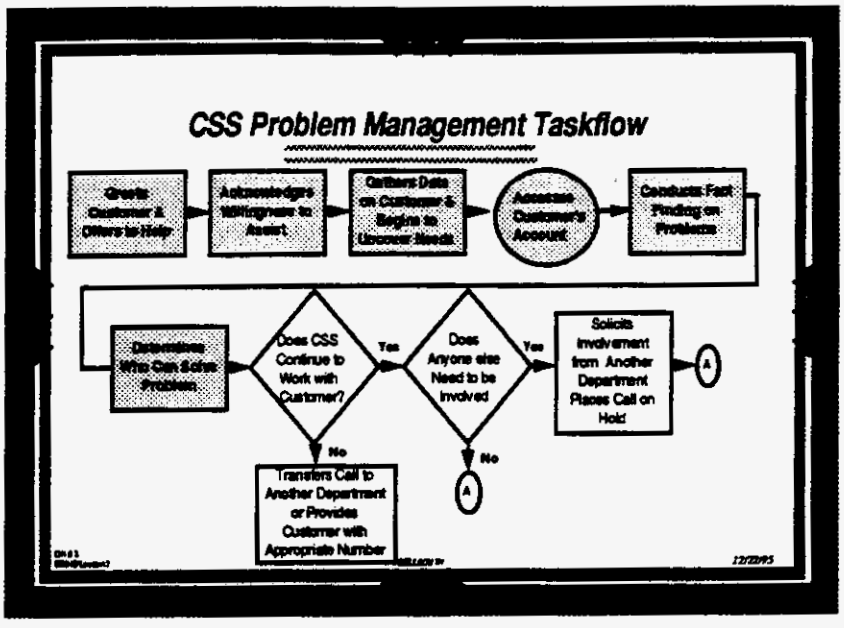
Scope of CSS Problem Management Activities, Continued

Relationship of Problem Solving/ Management (continued)

The shaded areas are common to every call. Only at the point of the first diamond decision box does the process separate into problem management and problem solving tasks. Prior to that time you are:

- greeting the customer
- conducting an opening approach
- asking questions to determine the nature of the problem
- arriving at an understanding of the problem
- obtaining agreement from the customer on problem



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Three Courses of Action to Resolve Problems That Are In-Scope

Problem Management Activities

One of the skills that you must develop as an effective CSS is to understand when it is appropriate for you to resolve the problem (*problem solving*) or when is it more appropriate to pass the call to another ***BellSouth*** department for ultimate resolution (***problem management***). BellSouth has developed specialized entities that are sometimes better suited to resolve customer problems than the individual CSS.

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Problem Management

Definition of Problem Management

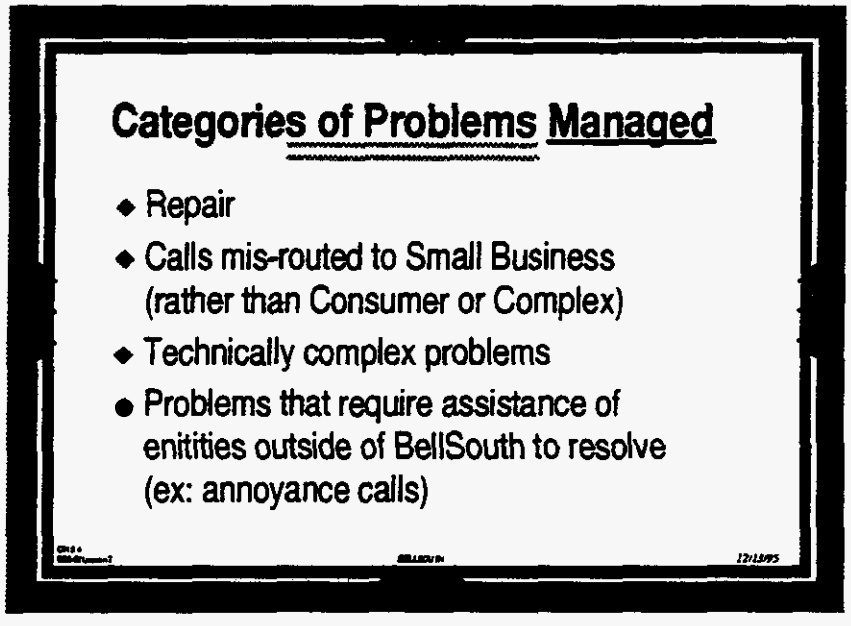
Problem Management is the process of passing a call to another team member within your office or to another department in order to solve the problem. In this instance you will have managed the problem but another team member has actually resolved the problem.

A problem is "managed" through the identification of the appropriate party to which the problem can be "passed" for resolution.

When to Problem Manage

Through the use of good questioning techniques, you can quickly determine the category of a customer problem. Using this information, you can quickly conclude whether a problem can be resolved by yourself or the problem could be more effectively resolved by another BST department.

It is important to ask sufficient questions to understand the extent of the problem. This ensures that the party receiving the call is the correct party and that the customer will not have to be transferred to a third department. An understanding of the problem should be sufficient to be able to provide a concise explanation of its nature to the other BST department.



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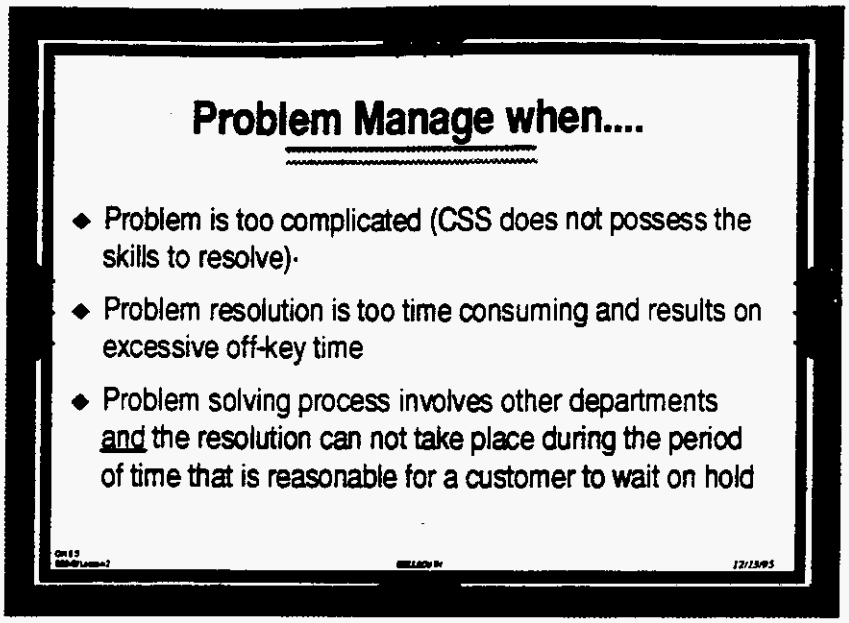
Problem Management, Continued

Second Test of Problem Management



When you pass a Problem, It's Still "YOUR" Problem

Problem management does not mean that you do not still "own" the successful resolution of the problem.

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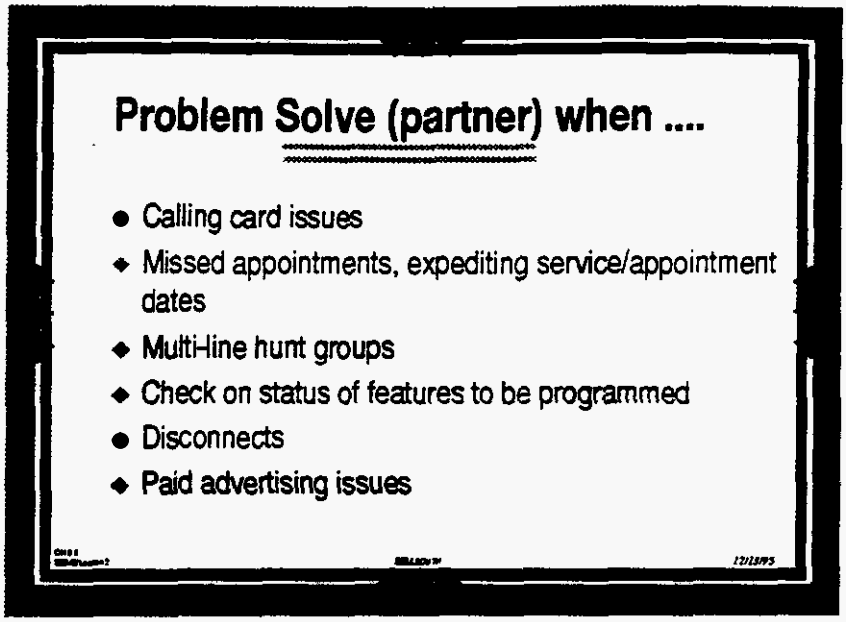
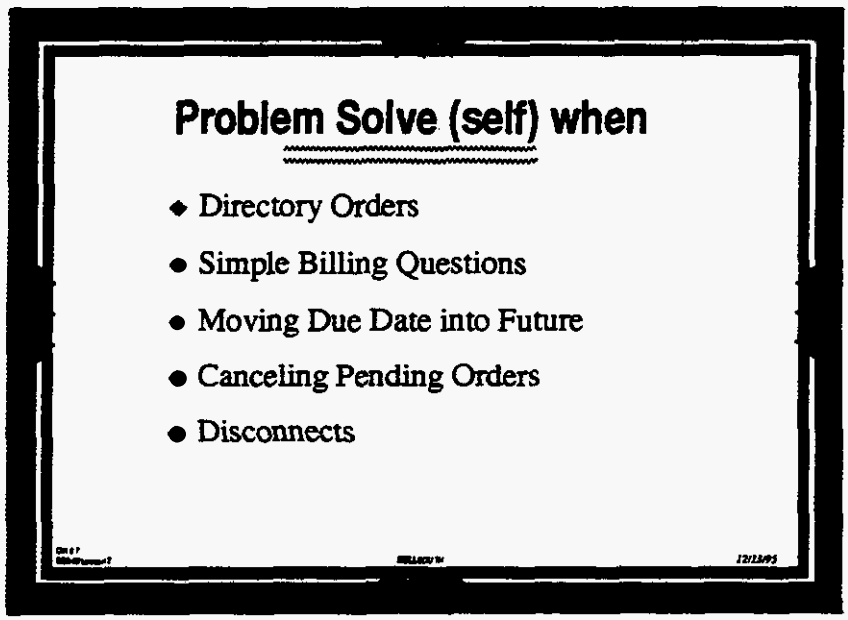
Problem Solving

Definition of Problem Solving

Like problem management, there are specific types of situations when it is within the scope of your responsibilities to resolve the customer's problem *without* passing it to another BellSouth department.





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Problem Solving, Continued

Activity: Problem Management or Problem Solving

Instructions

1. Identify each scenario as a problem management call or a problem solving call. Provide rationale.
2. Identify appropriate party to either gather information from or pass call to.
3. Identify appropriate follow-up

Problem Management or Problem Solving Cases

- Customer calls regarding their bill. She is irritated because she keeps receiving bills for a line that she called to have disconnected several months ago.
- Customer calls saying he recently moved his business to his residence and ordered voice mail at time of change. He is asking how to use the voice mail system.
- An installer calls you about a pending order. He needs to know if customer is eligible for service plan. He says that he can not determine from order.
- Customer calls to place an order for a directory in another city.
- Customer calls demanding to know why he received 2 BellSouth calling cards when he never ordered any. He wants to know what to do.
- Customer calls saying that his transfer of service (T&F) has not been done. He insists on knowing why he has not been given service in new location. He needs it working ASAP and if can't do immediately than keep old location working.

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Problem Management Course

Check For Understanding

Lesson 2

1) **Provide 5 examples of specific call types that are in scope for a CSS**
   1. _____
   2. _____
   3. _____
   4. _____
   5. _____

2) **List the 3 codes for missed appointments and their definitions**
   1. ____ - _____
   2. ____ - _____
   3. ____ - _____

3) **List 3 instances when it is appropriate for a CSS to pass a call**
   1. _____
   2. _____
   3. _____

4) **Use the following description of a problem situation to:**
   - **A. Construct a concise problem statement**
   - **B. Indentify entity (if any) to aid in resolution**

Customer calls regarding their call waiting. Customer states that she had called 2 weeks ago to disconnect and not working. They are again requesting disconnection and a credit for the last several weeks.

A._____
_____
_____

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B. _____

_____

_____

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Training Aid

Internal Entities to Whom CSS can Pass Problems For Resolution (PROBLEM MANAGEMENT)

1 of 8

Entity	Function	Pass-Off When...
Annoyance Call Bureau	• Takes annoyance call report • Tracks annoyance data • Investigates complaints • Interfaces with customers/ perpetrator • Referral to security	1. Customer complains about receiving unwanted calls
Collections	• Collect past due accounts	1. A customer calls regarding restoration of service 2. A customer complains about denial of service 3. A customer calls regarding dishonored checks
Consumer	• Complete handling of Residential telephone service	1. A residential customer is accidentally connected to Small business
CPNI	• Handles customers that have restricted their accounts from BellSouth Sales force.	1. Account is restricted, CSS can not access customer's account
Equipment	• Sales and Service of Telephone Equipment	1. Customer makes a request for telephone equipment
Marketing (Premise)	• Sales and Service of large customers. • Complex network services	1. Customer line size is outside of Small Business parameters 2. Customer has a system such as ESSX

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Training Aid, *Continued*

Internal Entities to Whom CSS can Pass Problems For Resolution (PROBLEM MANAGEMENT)

2 of 8

Entity	Function	Pass-Off When...
Repair Service	• Take trouble ticket • Test Line • Make Appointments • Dispatch repairman • Clear trouble	1. Customer records indicate a service should be working, but customer reports that it is not working
Security	• Protects buildings, people and network • Investigate integrity problems, internal and external • Toll fraud	1. A customer calls with information on threats to our network, buildings or people 2. CSS has investigated claims of tollfraud and they appear valid
Interface Specialist	• CSS Subject Matter Expert Specialist • Acts as CSS back-up to the Customer Support Specialist team • At peak times may take inquiry calls and resolve customer issues, and problems	1. Receiving intercompany calls questioning a pending order or issuance of a order 2. Large adjustments need to be computed and issued 3. Interdepartmental liaison needed to expedite complex customer support issues 4. Special projects require extensive closed key time 5. Specialist does not have knowledge to resolve/ manage customer problem

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Training Aid, Continued

Internal Entities to Whom CSS can Pass Problems For Resolution (PROBLEM MANAGEMENT)

3 of 8

Entity	Function	Pass-Off When...
Team Facilitator	• Assists the Customer Support Team Manager in administrative duties • Answers technical and general questions from CSS • Evaluate and allocate the workflow between CSS and interface • Sits with team members to enhance skills and expertise.	1. Customer insists on speaking to a supervisor 2. Access/ adherence objectives are not being met 3. Specialist does not have knowledge to resolve/ manage customer problem
Memory Call Help Line	• Assists customer in set-up of Memory Call features and answer questions	1. When customer has questions regarding Memory Call ask them to call 1-800-448-1110
Directories(out of town)	• Quotes charges and orders directories for out of town white & yellow pages	1. When customer has questions regarding out of town white or yellow pages ask them to call 1-800-682-4000

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Training Aid, Continued

Internal Entities With Whom CSS Can Partner to Solve Problem (PROBLEM SOLVING)

4 of 8

Entity	Function	Provides information to...
Corporate & External Affairs	• Acts as liaison between BellSouth and Public	1. Provides information to resolve needs of customers
Calling Cards	• Programs calling cards and reference of calls	1. Expedite calling card request 2. Verify or change PIN numbers
Work Maintenance Center (Dispatch)	• Routes installers and repairmen on orders or trouble tickets	1. Check on missed appointments 2. Verify dispatch
FACS or AFIG (Field Assistance Group)	• Assigns cable facilities to orders	1. Resolve manual facility assignments, usually address related
Legal	• Assist in decision making • Handle suits and legal inquiries	1. Address customer claims of "*loss of business*"
Line and Number Admin.	• Controls distributions of telephone numbers and SFG's	1. Aid in the obtaining of telephone numbers should ATLAS not respond 2. Create a multi-line hunt group
RCMAG	• Program Services. • Connect Lines • Disconnect Lines • Suspend services.	1. Verify that features have been programmed on a customer's line 2. Verifies that cable pair is working

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Training Aid, Continued

Internal Entities With Whom CSS Can Partner to Solve Problem (PROBLEM SOLVING)

5 of 8

Entity	Function	Provides information to...
BAPCO	• Handles paid advertising for telephone directories	1. Address customization issues on yellow page listings/ advertisements 2. Address customer claims/complaints regarding incorrect white/yellow page listings/ advertisements
TIRKS **(South-Central only)**	• Assigns critical dates and facilities to designed orders	1. Enable order to work on due date

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Training Aid, Continued

DIVISION OF CALL RESPONSIBILITY
6 of 8

* **The following table serves only as a guideline. Specialists should use their best judgment at all times before passing a call to a Business Application Specialist**

ACRONYM	EXPLANATION	WHO
DPA	different premise address	**BAS**
PIC	pre-designated inter-exchange carrier	**BAS/CSS**
CREX	USOC for outbound call block	**BAS/CSS**
RES to BUS	consumer to business	**BAS**
BUS to RES	business to consumer	**BAS**
CHNG BASIC CLS SVC	change basic class of service	**BAS**
CHNG TN	change telephone number	**CSS/BAS**
CHNG CFN	change call forwarding number	**CSS/BAS**
CHNG RCYC	change number of ringing cycles	**CSS/BAS**
INTRA CO. C or D	intra-company change or disconnect	**CSS**
DUAL SVC	initiate dual service while business in process of changing locations	**BAS**
SEPARATE BILL	create separate bill for individual lines billed to same account	**CSS**

NON-REVENUE generating calls from consultants, answering services and intra-company should be handled by **CUSTOMER SUPPORT SPECIALISTS.**

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Training Aid, Continued

DIVISION OF CALLS RESPONSIBILITY
7 of 8

YES = Specialist who receives call should handle
NO = Transfer to correct Specialist

*** The following table serves only as a guideline. Specialists should use their best judgment at all times before passing a call to a Business Application Specialist**

CALL TYPE	SALES TEAM	CUSTOMER SUPPORT TEAM
– N Orders	Yes	No
– T&F Orders	Yes	No
– C Orders		
• Add/Remove optional features	Yes	No
• Calling Cards	Yes	Yes
• CREX	Yes	Yes
• PIC	Yes	Yes
• DPA	Yes	No
• Res to Bus	Yes	No
• TBE (R-Orders)	No	Yes
• Add/Remove ADL Lines	Yes	No
• All Others	Yes	Yes
– D Orders - Co Initiated	No	Yes
– D Orders - Cust Initiated	Yes	Yes
– Record Orders	Yes	Yes
– Transfer of Contracts	No	Yes
– Pending Orders Inquiries	Yes	Yes
• HN - APPL Only		
• PD - Add/Delete S&E > APPL		
– Toll Inquiries	No	Yes

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Training Aid, Continued

DIVISION OF CALLS RESPONSIBILITY
8 of 8

* The following table serves only as a guideline. Specialists should use their best judgment at all times before passing a call to a Business Application Specialist

YES = Specialist who receives call should handle
NO = Transfer to correct Specialist

CALL TYPE	SALES TEAM	CUSTOMER SUPPORT TEAM
– Billing Inquiries/ Claims/ Adjustments	No	Yes
– Bankruptcy Cases	No	No
– Directory Error Claims		
• Initial	No	Yes
• Subsequent	No	Yes
– Miscellaneous		
• Requests for Directories	No	Yes
• Annoyance Call Problems	Yes	Yes
• Payment Arrangements	No	No
• Location of Payment Centers	No	No
• Calling Card Request	Yes	Yes
• Intracompany Order Inquiries	No	Yes
• Dcty Intracompany Requests	No	Yes

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Lesson 3: Q.U.A.R. Methodology: Questioning

Handout

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Objectives

At the conclusion of this lesson, you will be able to:

- Define success factors for use in an opening approach
- Identify the 4 types of customer "States of Mind"
- Identify behavioral clues for each customer state
- Identify best approach for responding to each customer state
- Use empathy to calm an angry customer

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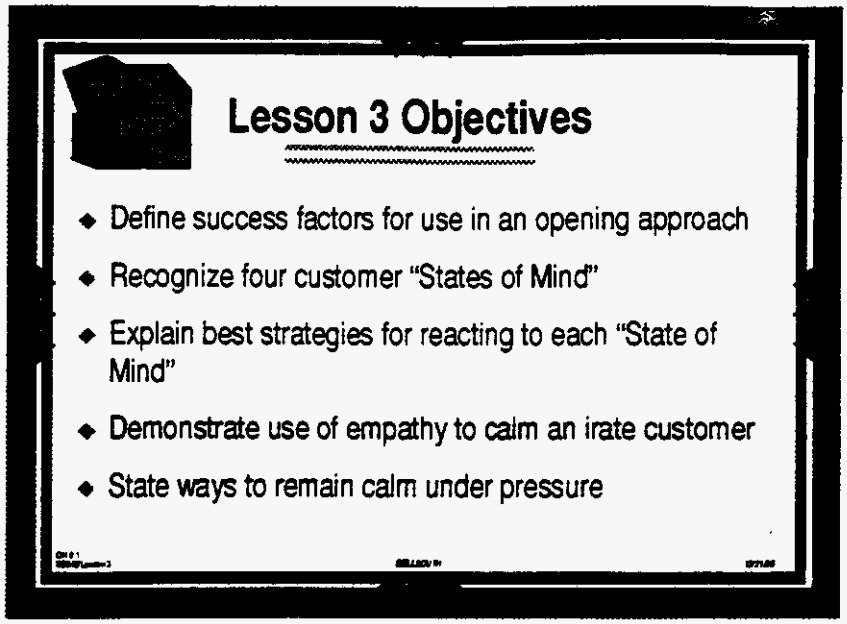
Q.U.A.R. Methodology: Questioning

Overview

Lesson Introduction



Take Responsibility For Problem Solving

When customers have problems, they want to know the Specialist can quickly resolve the problem. They want to know that they will not be transferred around the organization and left with the feeling that ***they*** are responsible for resolving their own problem. The actions you take will greatly influence the customer's perception of ***Bell*South**.

It is your responsibility to identify all information necessary to determine the cause of a customer problem. After obtaining all necessary information, and identifying the problem, you must then determine if the problem can be solved by your own action or if the problem must be passed to another entity for resolution. Remember to use the resources available to you to obtain necessary information/data. Don't ask customers unnecessary questions. This will annoy them if they know you already have the information on file.

If it is a CSS responsibility to resolve, you must take ownership of the problem and create customer confidence in your ability and desire to take whatever steps necessary to resolve. If customer is not confident with you, ask them to give you a shot at resolving the problem.

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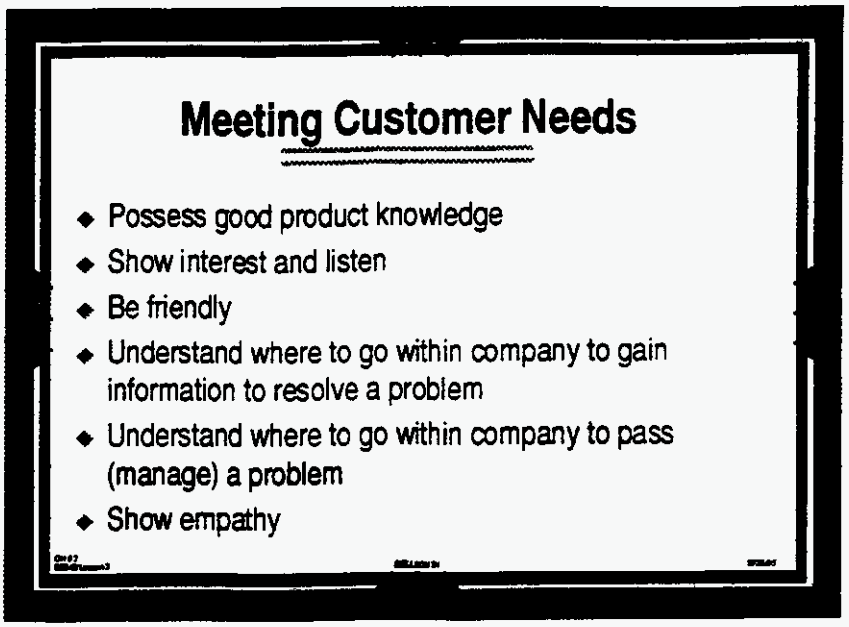
Preparing for the Customer

Be Prepared to Meet Customer Needs



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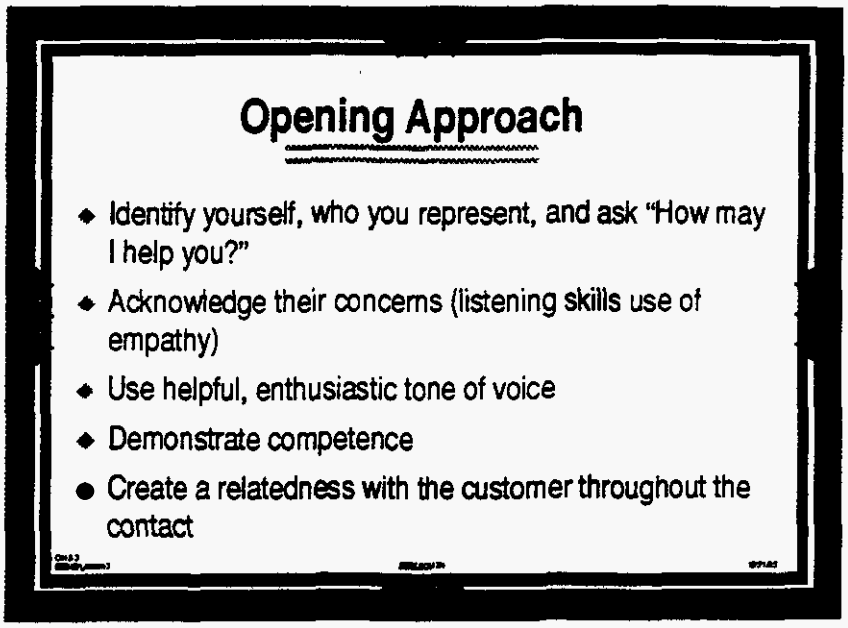
Opening Approach



Detail of Above Overhead

- Be professional and identify who you are, who you represent, and how you can help your customer.
- Establish and build trust and credibility. The customer should think of you as: honest, helpful, friendly, knowledgeable, professional and competent. (Example: Listen to the customer and acknowledge their concerns.)
- Display that you have a good, helpful, enthusiastic tone of voice.
- Demonstrate your competence. Ask appropriate questions, answer questions, and present information clearly and honestly.
- Create a "relatedness" to the customer from the moment you connect until you hang up.

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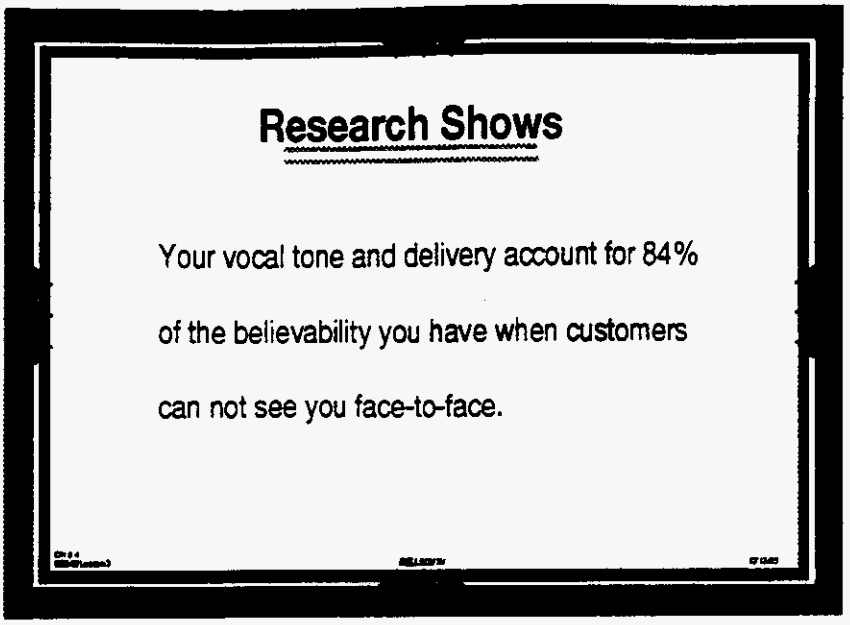
Opening Approach, Continued

Vocal Tone and Delivery Are Critical



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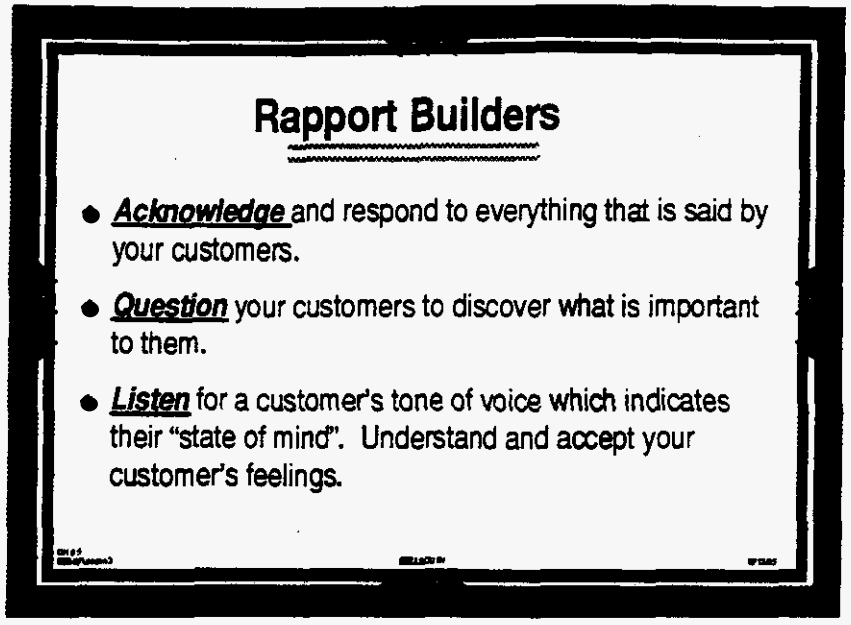
Establishing Rapport and Credibility

Establishing Rapport



Rapport is successfully established when you listen effectively to a customer and can identify and address the customer's:

- needs
- feelings
- behaviors

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Establishing Rapport and Credibility, Continued

Open-Ended Questions

There are two types of questions you can ask. They are:

- open-ended questions
- closed-ended questions

Open-Ended Questions

Open-ended questions (who, what, where, when, how and why) get the customer to open up and give you additional information.

Examples of open-ended questions:

"Could you tell me, how heavily do you rely on incoming calls for new business?"

"How often do you feel overloaded by incoming calls?"

Closed-Ended Questions

Closed-Ended Questions

Closed-ended questions allow the customer to give you a quick yes/no answer without elaborating. This is not desirable when you are attempting to gain additional information to take the lead and make a recommendation.

Examples of closed-ended questions:

"How do you handle incoming calls when all your lines are busy?"

"Tell me, how do you attract new business?"

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Recognizing 4 Customer States of Mind

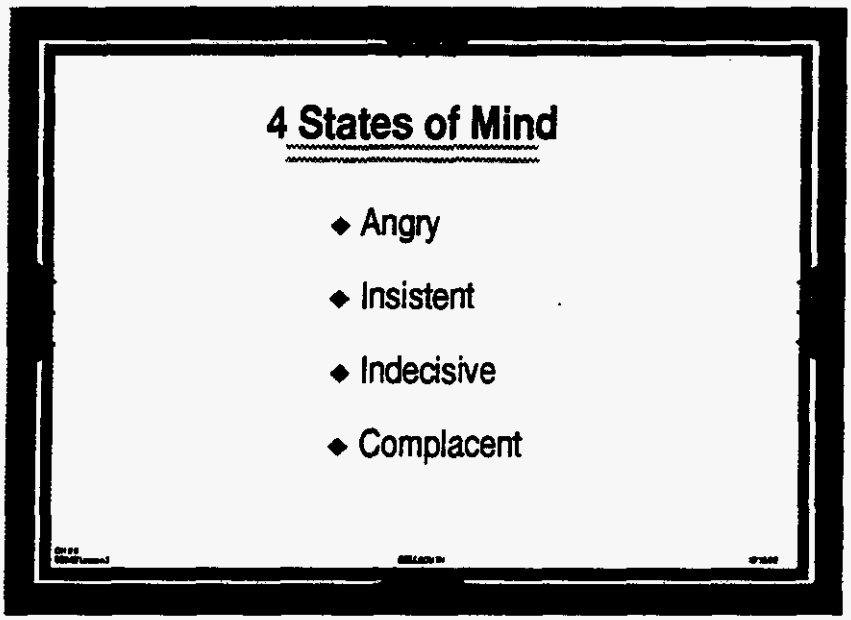
Consider the Customer's State of Mind

Based on our current needs and feelings, each of us acts in a certain way. The manner in which you act or ***react*** to others, changes as our individual needs and feelings alter with changing circumstances. The manner in which you interact with another is referred to as your current **"State of Mind"**.

One could say that identification of "State of Mind", conducting opening approach and establishing rapport, all occur simultaneously.

When you can identify a customer's immediate needs and understand their behavior you will have effectively identified your customer's current State of Mind. This is not a long involved process. In most cases you can identify a customer's state of mind in the first few seconds of a customer contact. The success of your interaction depends on your recognition of their State of Mind and your appropriate reaction to that State of Mind.

Four States of Mind



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Recognizing 4 Customer States of Mind, Continued

Different Customer Personalities

Remember, not only do we all display different behaviors, but we also all have different personalities. Aren't we glad!!

When dealing with your customers you will most often be dealing with four different personalities

They are as follows:

Angry:

When customers are irate they can be insulting, argumentative, and intimidating. When you recognize this, if you find that your feelings are rising in response to the customer's words or tone of voice, listen carefully and look for something with which you can agree, you must then validate your customer by taking personal responsibility give the customer assurance that you can resolve without becoming argumentative or defensive. If you become argumentative or defensive, the customer is then in control of your feelings. You should remain calm, ask questions and offer options and resolve your customer's problem

Clues to Determine Angry Customer

- Insulting
- Argumentative
- Intimidating

Insistent:

Insistent customers are very demanding, direct and assertive. They want action now. They can be very judgmental know all the answers and be very opinionated. You should take action immediately to make sure the problem is taken care of quickly and to the customer's satisfaction.

Clues to Determine Insistent Customer

- Demanding
- Direct
- Assertive

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Recognizing 4 Customer States of Mind, Continued

Indecisive:

Indecisive customers try to avoid making decisions, become fidgety, and hesitant. When you are working with an indecisive customer, ask questions to clarify customer's needs and be reassuring to the customer that they have made a good decision. It could be as simple as assuring them that the monthly rate they are paying for call waiting is very small compared to the peace of mind of knowing they won't be missing a business call that could result in a loss for the customer.

Clues to Determine Insistent Customer

- Avoiding
- Fidgeting
- Hesitant

Complacent:

Complacent customers most often show a "social" behavior. They are very conversational and relaxed. They smile often. Even though you can't see them, you can hear the smile through their voice tones. These customers have usually had to make some accommodation to us, i.e., being placed on hold to get specific information for customer. When this occurs show your appreciation by telling the customer how much you appreciate their patience or understanding.

Clues to Determine Complacent Customer

- Smile
- Conversive

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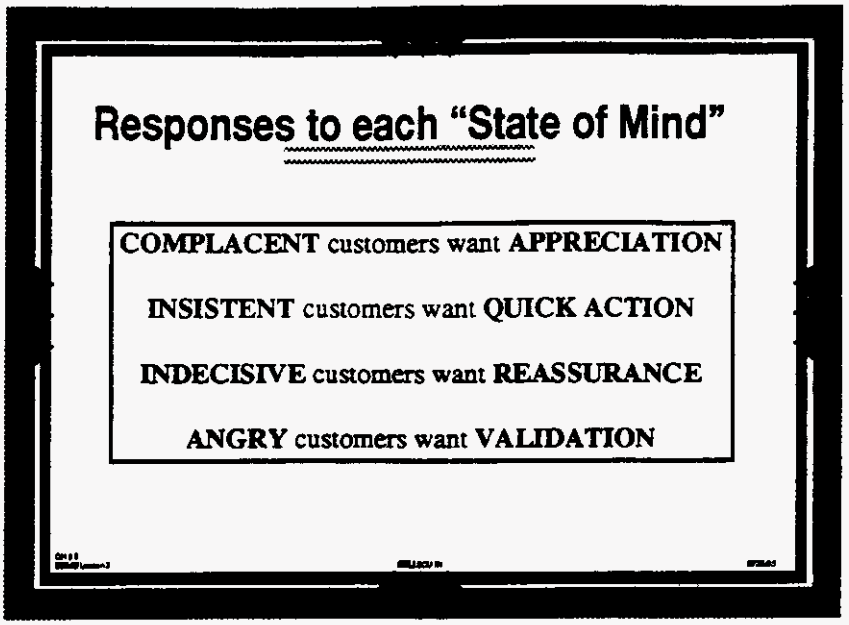
Responding to Each State of Mind

Questioning Technique

Each State of Mind has a specific questioning strategy you should use for initiating the resolution of a customer's problem.



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Responding to Each State of Mind, Continued

ACTIVITY

Empathy as a Strategy for Calming Angry Customers

PURPOSE: To share angry customer service interactions. The intended outcome is for it to be clear that in successfully handled situations, the customer's concerns were validated through the customer service provider's use of empathy.

Empathy as a Strategy for Calming Angry Customers Instructions

- Put on your "customer hat" for the first portion of this activity. Describe with the class situations in which **you were the customer** and became angry.
- Now "change hats' and describe situations in which **you were the customer service provider** and the customer became angry.

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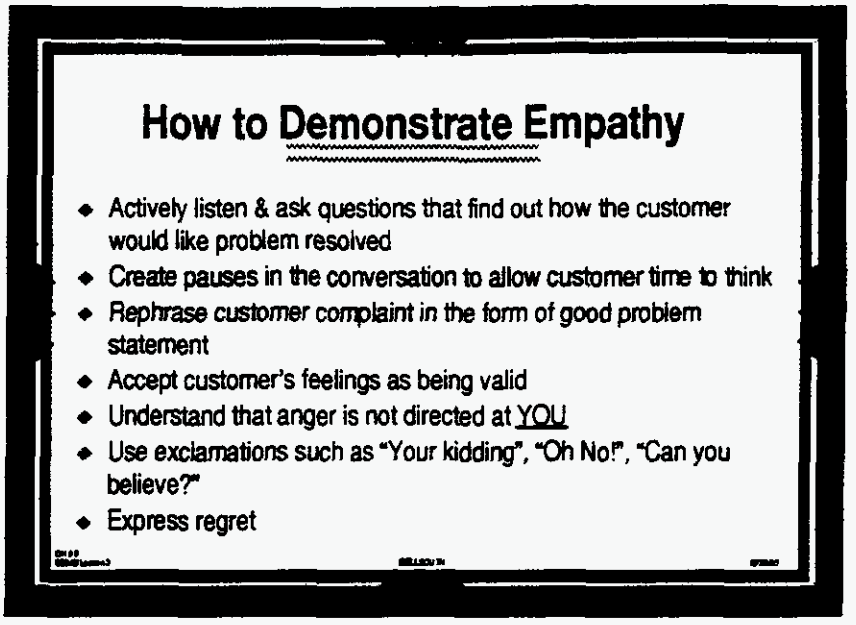
Responding to Each State of Mind, Continued

Use of Empathy

To understand someone's problem validates that person's "right" to have the problem. By empathizing with your customer you are recognizing their state of mind.



Empathy to Calm an Angry Customer

The first and major goal of any customer service activity is to meet the customer wants and needs. In other words say **YES** to the customer.

If the customer's request is difficult, it then requires special attention. We may sometimes concentrate all our energies on difficult customers, griping and complaining about them as if they were the norm. Actually, most customers are easy to deal with, and they deserve as much of your attention and energy as the rest.

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Responding to Each State of Mind, Continued

Empathy to Calm an Angry Customer, continued

If you are unable to calm an angry customer by using empathy and being sympathetic to the customer's problem, you may ask your coach to plug into your position and listen to the conversation. You may then be able to work out a solution with the help of the coach that will be satisfactory to the customer.

Anytime you are dealing with an irate or angry customer, ask yourself how you would feel if you were in your customer's shoes. Why do we all respond differently to situations that are basically similar? We all have different behaviors that we drop into when things aren't going well for us. It's as if someone pushed your button and you respond automatically, most often in ways you don't really like. This is likely to creative negative feelings in you.

So, if your customer has made several calls to your office and was not able to find the right person to talk to, you may just be that last button and the customer may dump on you. Don't **react** to the feelings. Be proactive in accepting other people as they are and assume that behind every behavior is a positive intention.

Reduce your customer's stress level and you will reduce your stress level. On the job stress for specialists comes from being emotionally involved in difficult situations. One of the most effective stress reducers is having the skill to take emotion-filled situations that are moving in an unproductive path and turning them into calm, productive transactions. Your communication skills
that you learned about earlier will help you to manage situations that might have the capability of turning into unproductive situations for you.

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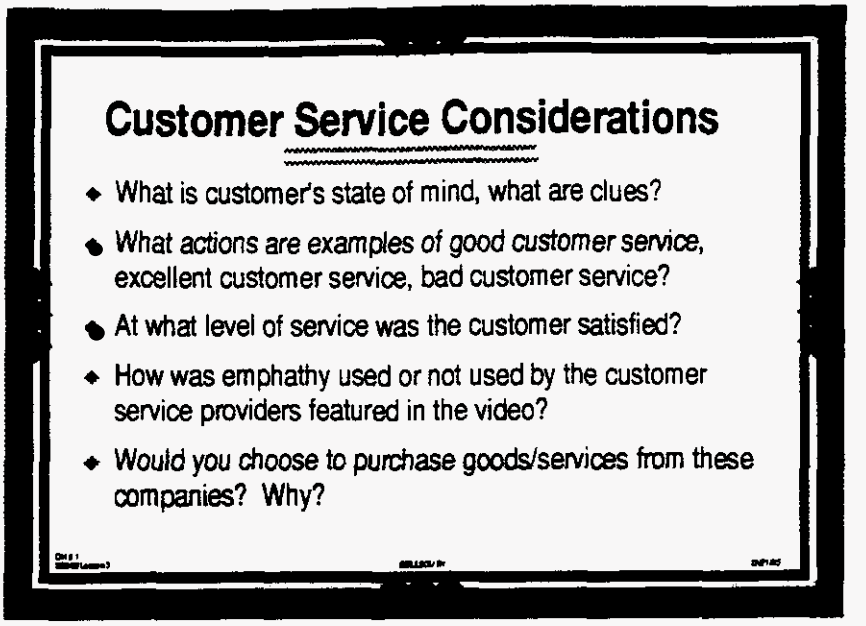
Customer Service, "What's Your Gripe?"



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Lesson 4: Q.U.A.R. Methodology: Understanding the Problem

Hand Out

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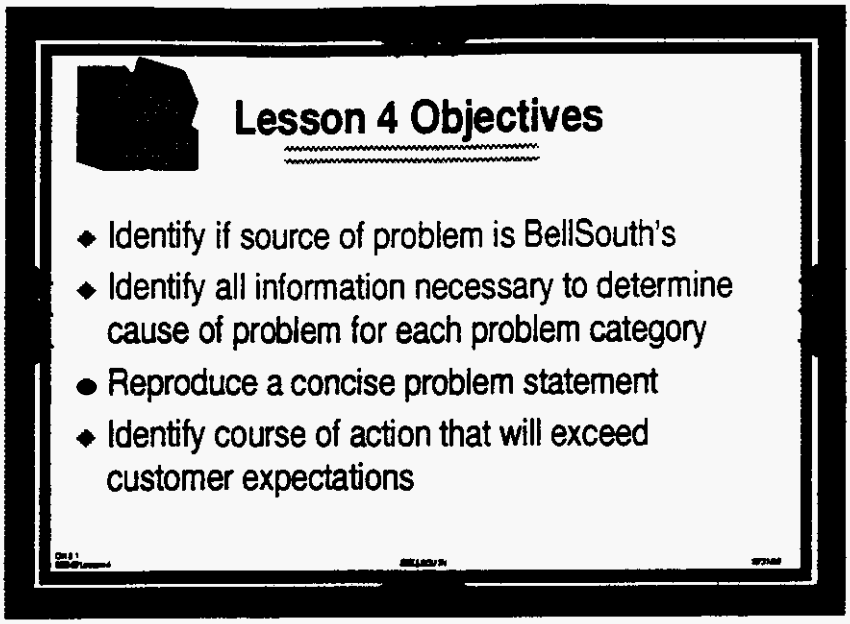
Understanding the Problem

Overview

Lesson Introduction



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Identify the True Need

Nature of Problem

As a result of the questioning process, you should arrive at an understanding of the nature of a customer's problem.

There two possible types of problems encountered by a CSS

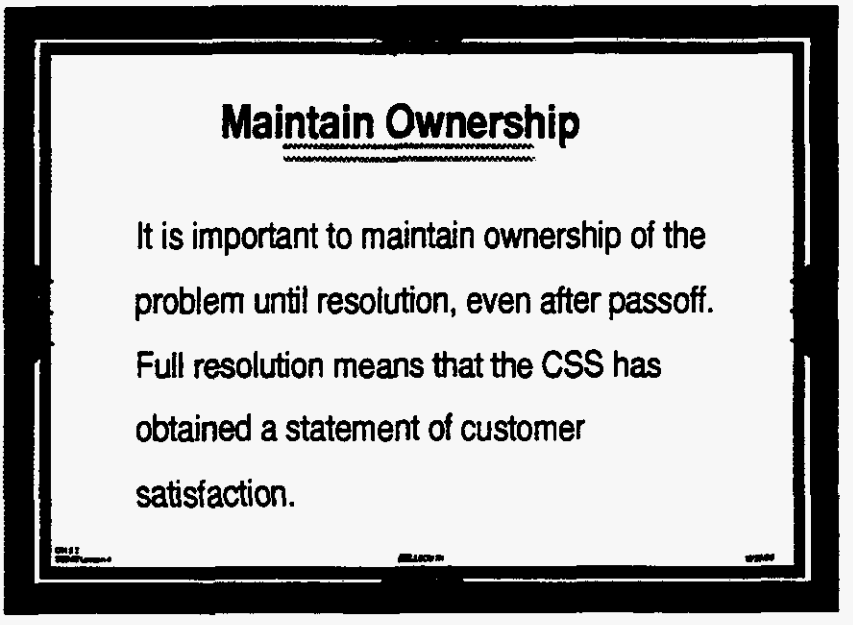
1. ***Bell***South related problems
2. Non-***Bell***South related problems

Opportunity to Exceed Expectations

"When expectations are low, it is easy to exceed expectations and create a moment of truly excellent customer service."

Resolution Equals Statement of Customer Satisfaction

In all customer interactions, it is important to maintain ownership of the problem until resolution. The customer should feel comfortable with the knowledge that you are willing to take whatever steps necessary to resolve the problem.



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Identify All Information Required to Determine Cause of Problem

Problem Categories Have Standard Data Gathering Requirements

The standard problem categories, of

- Pending Orders
- Billing Questions
- Directory Advertising Error

have a standard, predictable indicators for their cause. The quicker you becomes familiar with the standard problem types, and their key indicators. the quicker a plan of action can be determined. This, in turn, will speed the time to problem resolution.

It is the CSS's responsibility to identify all the information necessary to understand the nature of a problem. Once you have this information, you must then;

- determine if the problem can be solved by your own action or
- problem must be passed to another party for resolution.

Understanding Potential Pending Order Problems

There are several categories of pending order problems, they are

- Ordered service/product not operational
- Service order information not complete
- Missed appointments

In order to understand the proper resolution, information to be gathered includes:

1. number calling about or business name
2. date of the service commitment
3. what product or service was ordered

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Identify All Information Required to Determine Cause of Problem, Continued

Billing Questions

The most common billing questions concern the inclusion of a partial month billing in addition to a full month of service. In order to understand the proper resolution, information to be gathered includes:

1. number calling about
2. billing month being inquired

Directory Errors

The vast majority of directory errors are dealt with directly by BAPCOYour task is to verify that there truly is an error prior to passing the call to BAPCO (Southern) or completing a mechanized error report (South-Central). In order to understand the proper resolution, information to be gathered includes:

1. What is telephone number in question
2. What directory is in error, also white or yellow pages or both
3. What information is misprinted
4. What the proper information should be
5. Effect of misprint on customer's business

EMPHASIZE that it is important for the CSS to empathize with the customer prior to passing the call, or while completing the error directory report. As a general rule, you should not:

1. Assume any fault or liability for error
2. Make any financial commitment to customer

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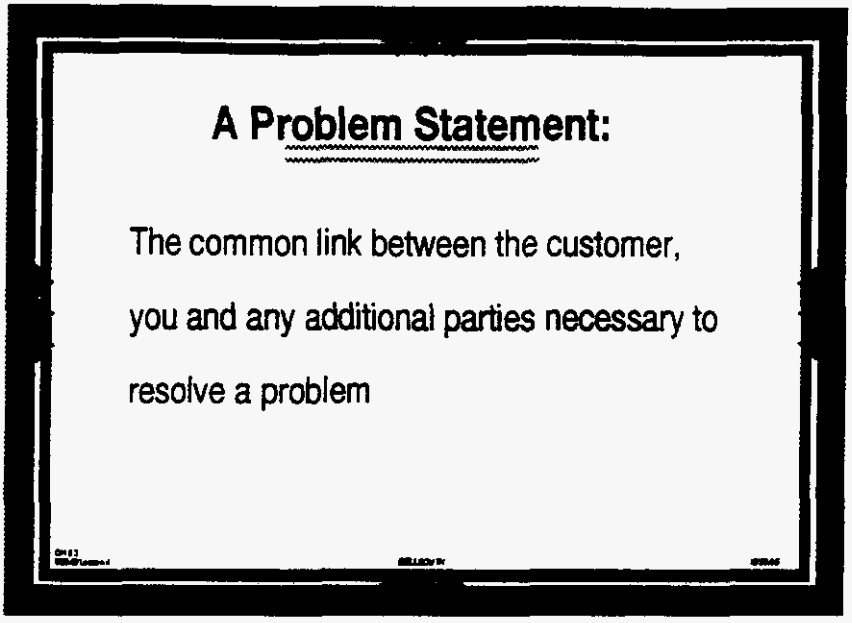
Problem Statements

Problem Statement as Test of Understanding

A "test" of your thorough understanding of a problem is the production of a good problem statement. Problems can be addressed far quicker when all concerned parties have a like understanding of the problem.



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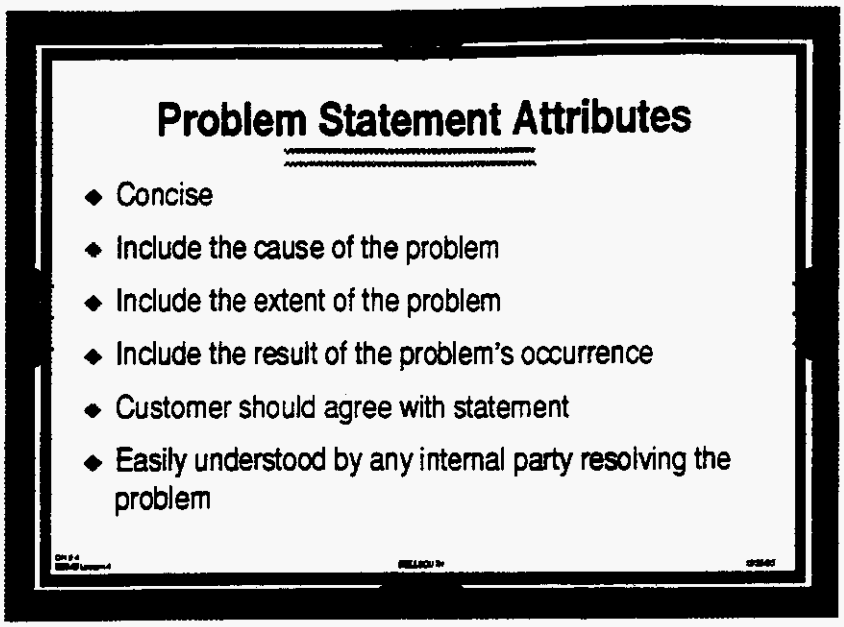
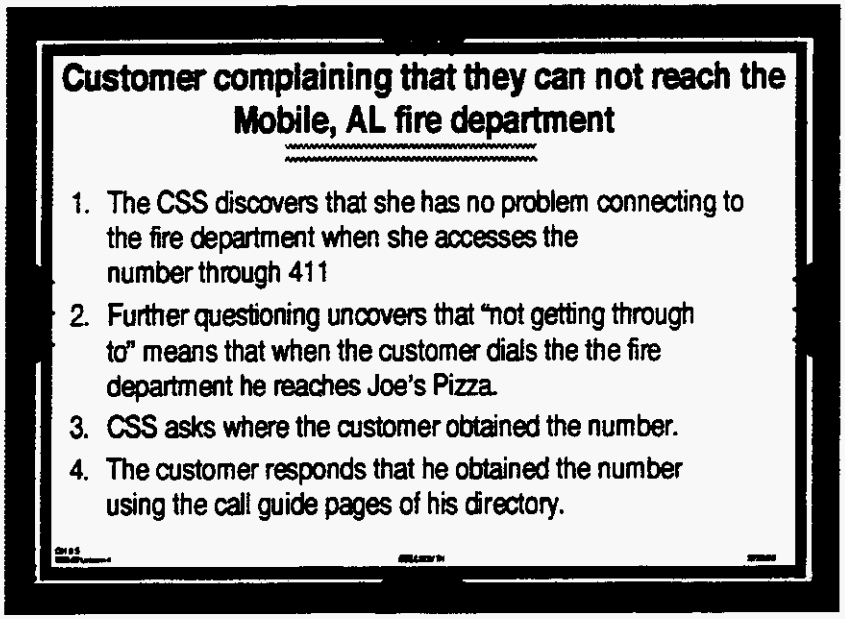
Problem Statements, Continued

Characteristics of a Good Problem Statement



Example of a Good Problem Statement



Write a good problem statement, based on above.

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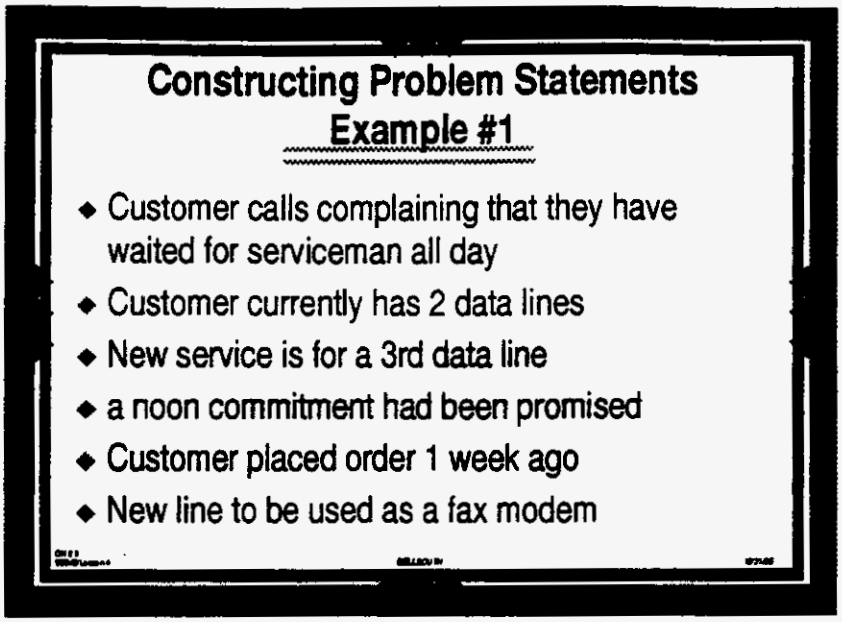
Problem Statements, Continued

Activity

Construct a good problem statement for each of the following problem statements using the *Problem Statement Attributes* described earlier..



Problem Statement:_____

_____

_____

_____

_

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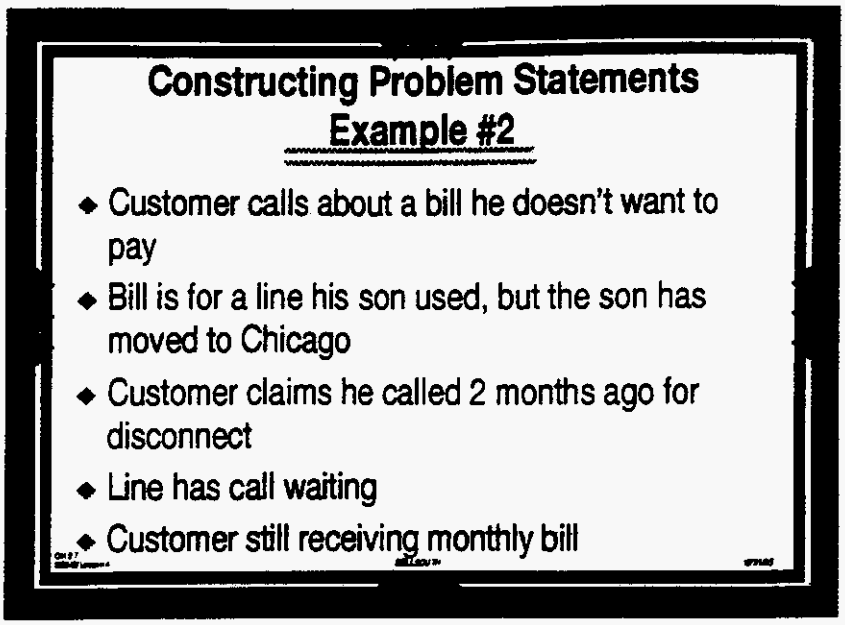
Problem Statements, Continued



Problem Statement:_____

_____

_____

_____

_

Identification of Actions That Will Exceed Customer Expectations

Once a customer's problem has been clearly defined through a good problem statement, the CSS should attempt to discover what actions can be taken to exceed the customer's expected resolution to the problem.

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Lesson 5: Q.U.A.R. Methodology: Taking Action

Hand Out

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Taking Action

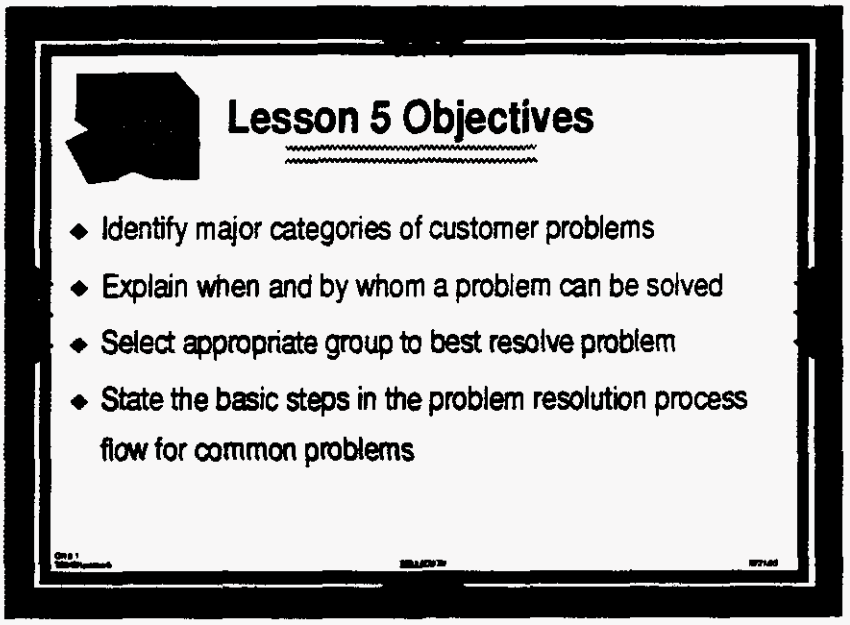
Introduction

Introduction

BellSouth would like to be the vendor of choice for our customers. In order to do this, once we understand the nature of a problem and can repeat the problem to the customer through a concise problem statement, we must proactively take action to resolve the problem as quickly as possible.

In this lesson participants will learn the specific actions/processes they should undertake toward resolving major categories of customer problems.

Objectives



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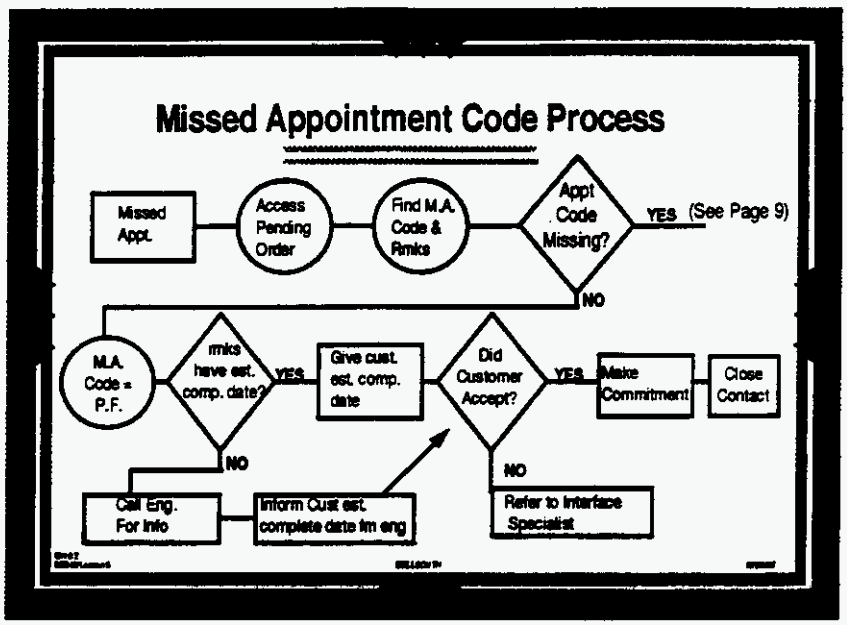
Pending Order Resolution - Missed Appointment

Missed Appointment

If the customer states that their order for service hasn't been worked, then you must perform the job tasks necessary to determine why the order has not been worked. The first step will be to look at the pending order to determine the due date and the reason given for not working the order. In order to meet the needs of the customer, it may be necessary to call Dispatch and determine if order can be worked at time your customer requests. There may be occasions when you will have to negotiate another due date with your customer. If this should occur, make sure you give your customer a complete explanation of why another due date is necessary.



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Pending Order Resolution - Missed Appointment, Continued

Step	Action
1	Greet Customer/Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Look at the pending order to determine the due date and the reason given for not working the order.
5	Repeat problem statement. Add any additional comments necessary for internal clarification.
6	Obtain answers from Engineering on: 1. Clarification on why first appointment was missed 2. Estimated date when facilities would be available to complete order.
7	Negotiate with Engineering to complete order or negotiate for another due date that Engineering has confidence in their ability to keep.
8	Provide your customer with a complete explanation of why another due date is necessary
9	Obtain statement of satisfaction from customer confirming new due date
10	Acknowledge customer for their business and ask if there is anything else that you can help customer with
11	Follow up the order on due date to ensure that it is being worked as promised.

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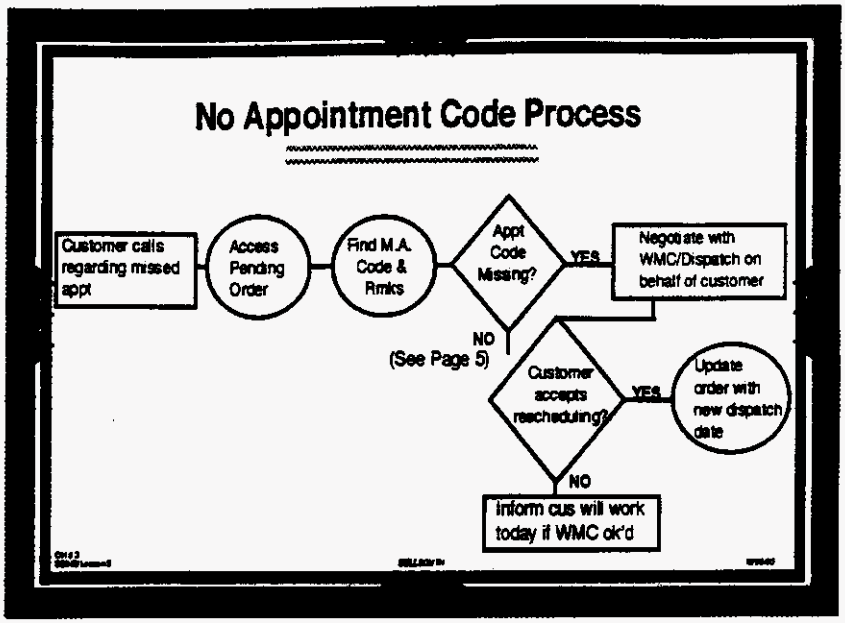
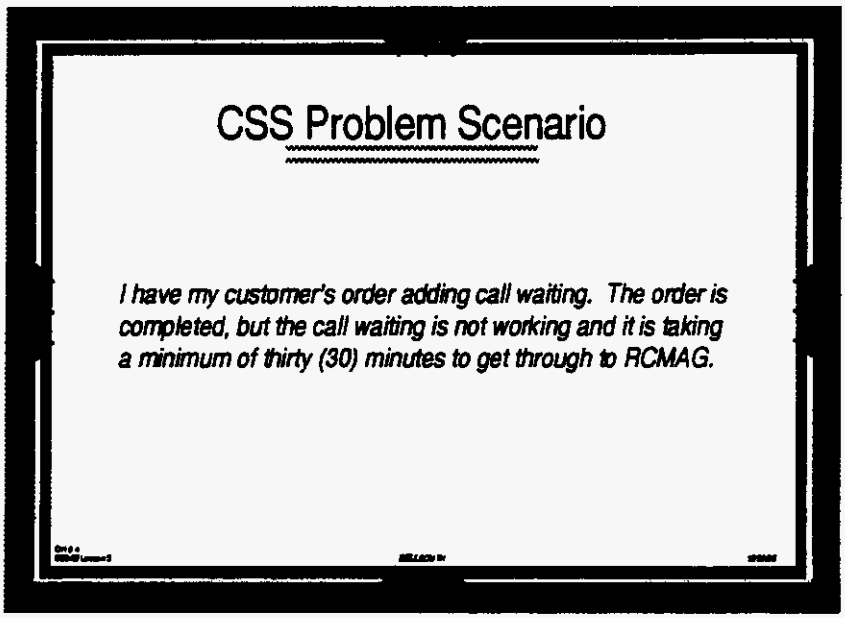
Pending Order Resolution - Missed Appointment, Continued

If no Appointment code.....

The following process flow is an example of another alternative process that can occur when a customer calls regarding a missed appointment.



List the actions that this CSS would likely take to resolve the following:



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Pending Order Resolution - Missed Appointment, Continued

Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine customer order to determine due date and for confirmation that the code for call waiting, *(ESX)* appears in the service and equipment field, *(S&E)*.
5	Partner with RCMAC or repair to determine the problem while customer is on hold
6	If resolution time would cause an excessive amount of time on hold for the customer, pass call to interface specialist

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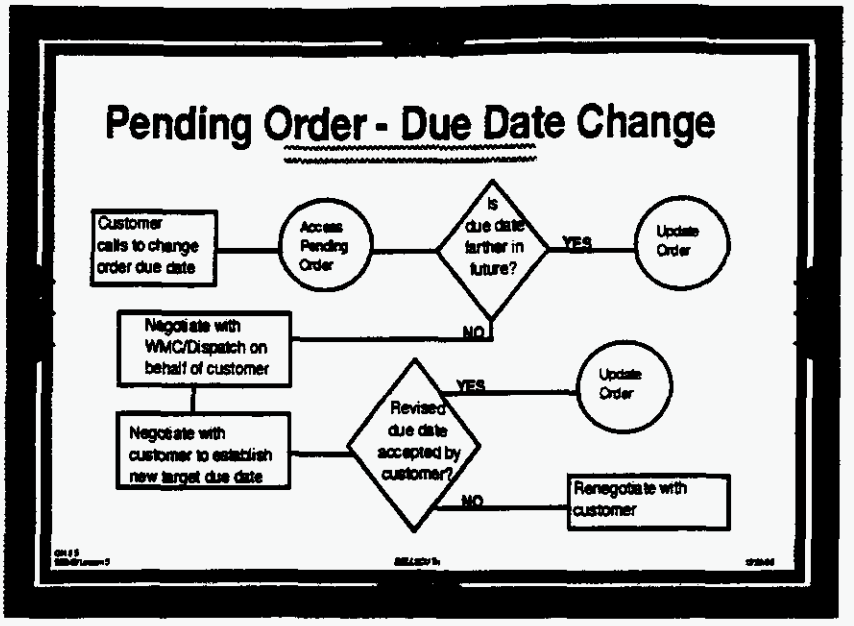
Task Process: Pending Orders - Changing Due Date

Pending Orders: Changes



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Task Process: Pending Orders - Changing Due Date, continued

Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine customer order to determine due date and complexity of order.
5	Determine what resolution will satisfy the customer, will exceed their expectations
6	Make determination of feasibility of committing to earlier completion of work based on order complexity and current time of day.
7	Negotiate with dispatch to obtain commitment
8	Obtain statement of satisfaction from customer confirming new due date
9	Update order
10	Acknowledge customer for their business and ask if there is anything else that you can help customer with

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Task Process: Directory Error Resolution

Directory Advertising Error

If your customer states that there is an error in the directory and information is being given incorrectly, you must check by first looking at the directory to determine and locate error. There could be times when the customer is looking at an out of date issue of the directory and you may find that there is no error in the current directory. If there is an error, then you should refer the error to BAPCO for resolution. You may online transfer the customer to a BAPCO representative or you may do a mechanized directory error form which you will learn about later in training.

Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine the directory to verify and locate error
5	Refer the error to BAPCO for resolution
6	Complete a mechanized *Directory Error Form* for South Central Bell area or on-line transfer the customer to a BAPCO representative in Southern Bell area.
7	If you on-line transfer your customer, ask permission to do so.
8	Provide the supporting information to the BAPCO representative. • Give customer's name • telephone number internally targeted repetition of problem statement; *I have reviewed the Mobile, AL call guide pages. I have dialed the number listed and the number is listed incorrectly. All individuals referencing the call guide when attempting to reach the fire department will instead reach Joe's Pizza.*
9	Provide customer the name of the BAPCO representative that will be resolving the problem.
10	Acknowledge customer for their business and ask if there is anything else that you can help customer with prior to passing them on to BAPCO representative
11	Note customer's account that you have determined that wrong number was printed on *X* date.
12	Follow up with customer to ensure that problem has been resolved to their satisfaction

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Task Process: Billing Explanations

Billing Explanation

If your customer is having a problem understanding a bill that has partial billing shown, then you must explain to customer what has created this bill. It could be a lack of understanding that will require your patience in making sure the customer understands your explanation of the bill. It may be that the Business Application Specialist didn't give the customer a complete upfront statement explaining a prorated partial month bill plus a full month bill. Even if this is the case, it is still the responsibility of the Customer Support Specialist to give a complete explanation to the customer.

It is common customer problem to misread or misunderstand a bill that contains a partial month billing. If you are looking at the customer's account to explain prorated billing, you will have to determine the billing date, the order number and date completed that created the prorated bill. Look at each item and explain to customer that "The number of days of partial billing and also a full month in advance creates a partial prorated bill." The customer may want you to breakdown each item and give a complete explanation of each i.e., "Remote Access Call Forwarded was added to your service on the 15th of the month, your billing date is the 28th of each month, therefore you have been billed a partial month from the 15th through the 27th and a full month for the 28th billing date." You will learn more about Other Charges and Credits later in your training.

Step	Action
1	Question customer to determine nature of problem. Questions should aid you in determining their level of billing knowledge.
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine account to determine the: • billing date • the order number • date order completed
5	Explain to customer that the number of days of partial billing and also a full month in advance creates a partial prorated bill."
6	Acknowledge customer for their business and ask if there is anything else that you can help customer with
7	Note customer's account that you provided an explanation of OC&C on *X* date

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Lesson Summary

Lesson Summary

Our job is **not** complete until we are assured that the problem has been resolved and we have obtained a statement of satisfaction from the customer. In the next lesson we will discuss the completion of the Q.U.A.R. process, *Resolution.*

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Lesson 6: Q.U.A.R. Methodology:
Taking Action - Lead Generation

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Taking Action - Lead Generation

Overview

Purpose

Improve customer satisfaction and create loyalty by developing guidelines for creating a lead versus finalizing a sale.

Objective

To obtain leads, the Customer Support Specialist identifies customer telephone **NEEDS** through general phrases and open-ended questions without intentionally targeting or naming a product.

ADVANTAGES:

- Improves customer satisfaction
- Improves access
- Increases revenue
- Relieves support specialist of individual sales responsibilities, allowing them to focus on support functions
- Keeps customer open-minded
- Prevents oversell/ overkill/ double talk
- Increases consultative selling power by the business applications specialists

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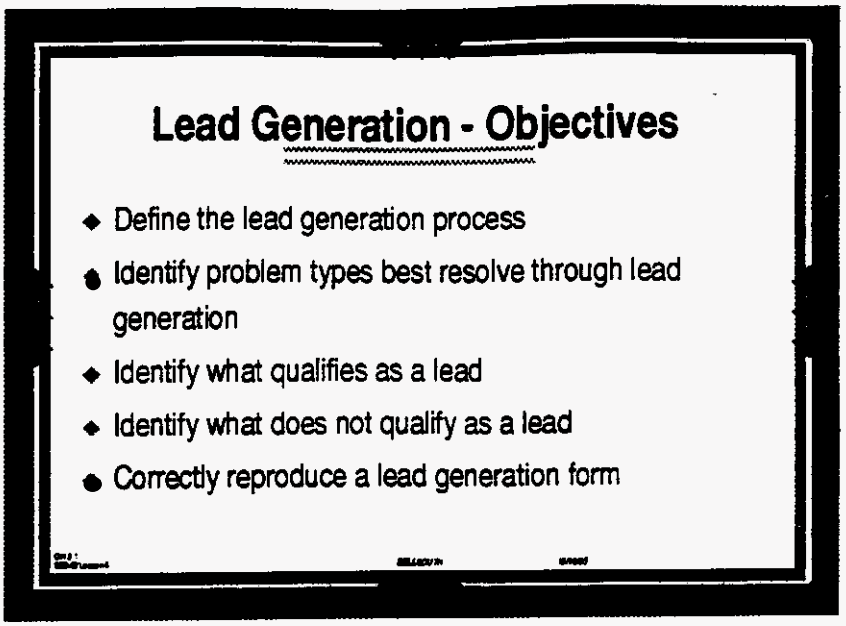
Overview, Continued

Lesson Introduction



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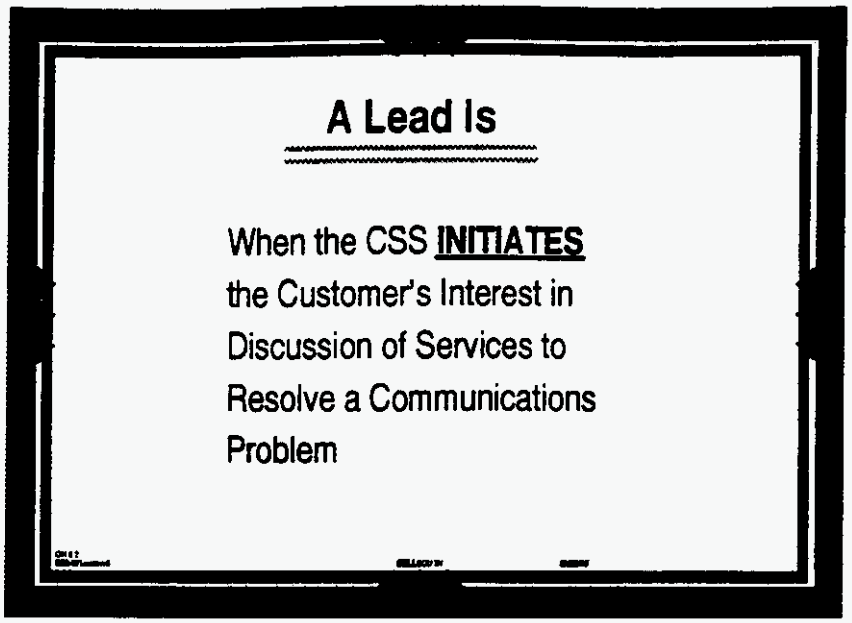
What is a Lead?

Definition of Lead Generation



- A lead can solve a customer's problem
- A lead can be generated for a service or product unrelated to the original problem but uncovered during the process of problem management

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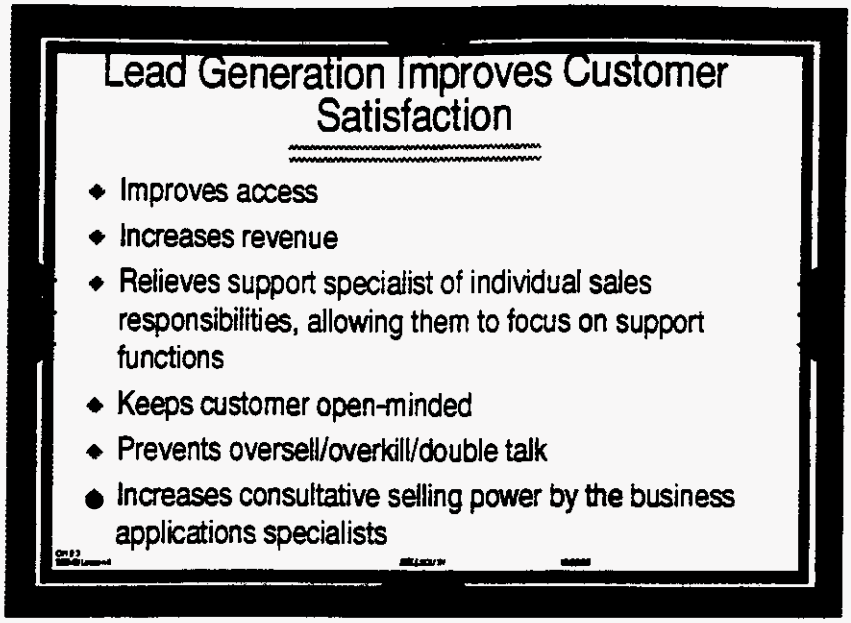
What is a Lead?, Continued



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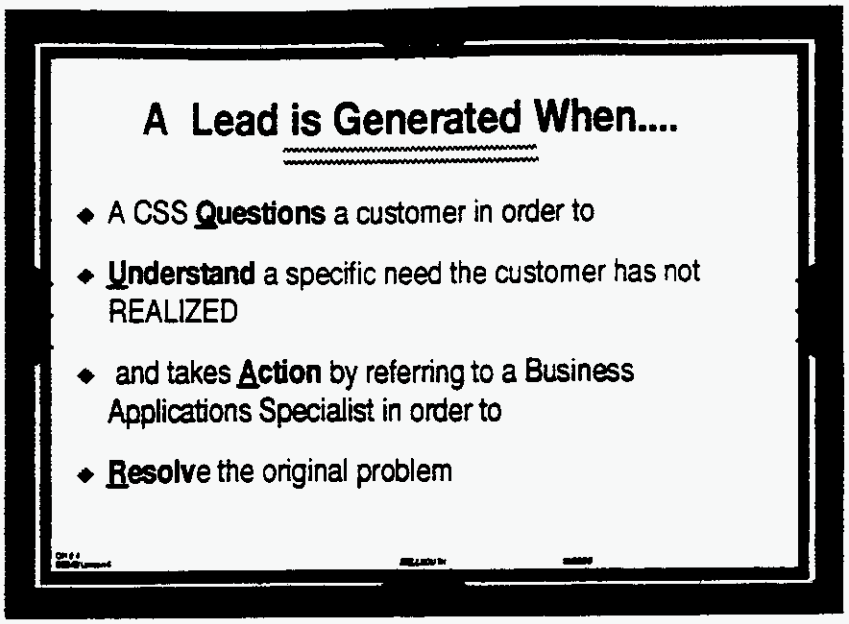
What is a Lead?, Continued

INTRODUCE overhead



Lead generation is one form of successfully using the QUAR process. It is very important to follow all the methodology's steps before attempting to resolve the customer's problem via the lead generation process.

Only after rapport has been established, and the customer's problem is fully understood is the customer apt to listen to our recommendations.

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The Lead Generation Process

How Leads Are Recorded

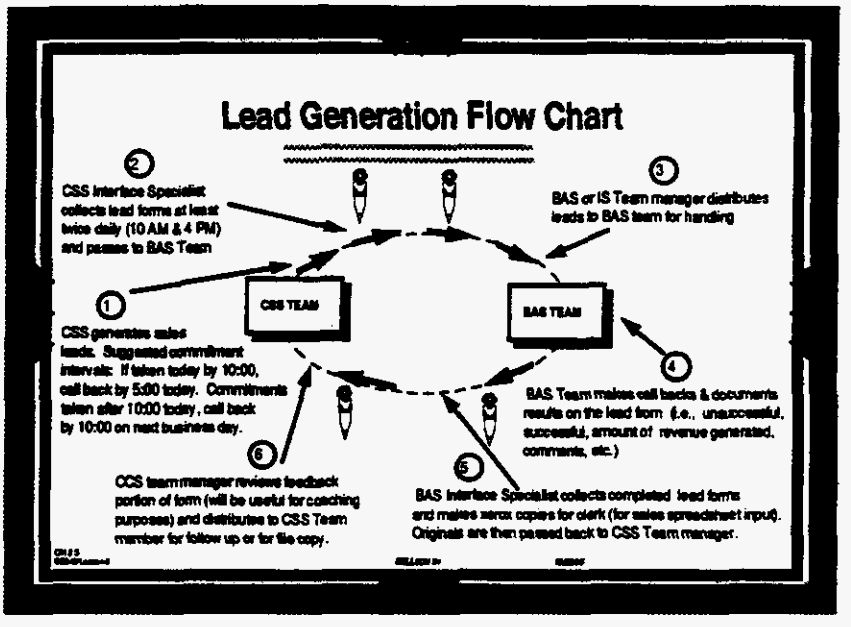
A specialist will receive one (1) lead referral credit, per customer, for **successful** sales. Remember leads that do not result in a sale on the part of a BAS do not count as leads for the CSS.

EXAMPLE:

If the CSS speaks with one (1) customer and the needs identified may apply to five (5) Customer Service Records, the specialist will receive one (1) credit.

Lead Generation Process Flow

DESCRIBE the process that a lead generation sheet goes through using the accompanying slide.



This process can differ from state to state.

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The Lead Generation Process, Continued

Examples of Problem Types Managed Through Sales Lead Process

1. **BILLING QUESTIONS**

Customer calls in about toll calls. Customer Support Specialist answers customer's questions and realizes customer may be able to use some of our services.

> *"Mr. Customer, in looking at your calling patterns, I believe we have some services that could possibly help you save money on your toll calls. I recommend a Business Applications Specialist speak with you."*

The Customer Support Specialist completes a LEAD GENERATION FORM and under the SUPPORTING COMMENTS portion states:

> **SUPPORTING COMMENTS:**
> - Customer has $50.00 of tolls to XYZ city and is interested in services that would save him money.

2. **TRANSFER OF CONTRACT**

Customer calls requesting telephone number in his name, but does not request any additional services. Talk to the customer about his needs as a new customer.

NOTE: Something is changing since the owners will change and new people are responsible. Ask questions such as:

- "Mr. Customer, How will you be using the service when it is in your name?'
- "Mr. Customer, Now that you are the new owner, what changes would you like to see in your service?"
- "Now that you have had the service for a while, what changes need to be made?"

> One a need is discovered on the T of C, you must determine at what point to prepare the lead generation form. Remember, the T of C should be finalized before the new owner may make changes to his/her services.

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The Lead Generation Process, Continued

3. UPDATING PENDING ORDER

When updating a pending order, if the customer asks for a service, this is not a lead. When updating an order and discovering a need, the Customer Support Specialist should on-line transfer or make a commitment for the Business Applications Specialist. This is a lead. A lead form should be sent.

4. MONTHLY RECURRING CHARGE

Leads are not determined solely by sales revenue. Services that carry a monthly recurring charge yet do not generate sales credit, such as a lead that results in an off premises extension or a trunk on a PBX, are considered leads.

5. CUSTOMER INITIATED CALLBACK

When a lead is closed unsuccessfully by a BAS, and the customer calls back to place the same order, it will become a successful lead. However, it is the Customer Support Specialist's responsibility to follow-up and refer to the designated tracker to receive credit. The CSS should keep a file of all unsuccessful leads and check them weekly for 4 weeks.

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The Lead Generation Process, Continued

Miscellaneous Information

In order to ensure that you receive credit for all leads generated you should take 2 actions:

1. Complete a lead generation form
2. In ALL Instances, the Customer Support Specialist should note the account of a lead referral.

When attempting to transfer to a BAS in order to complete the sale and all BAS lines are busy and the customer insists on completing the transaction;

- CSS completes the sale and issues order
- CSS does not complete a lead generation form
- CSS does not receive credit for lead, but office does receive credit for sale

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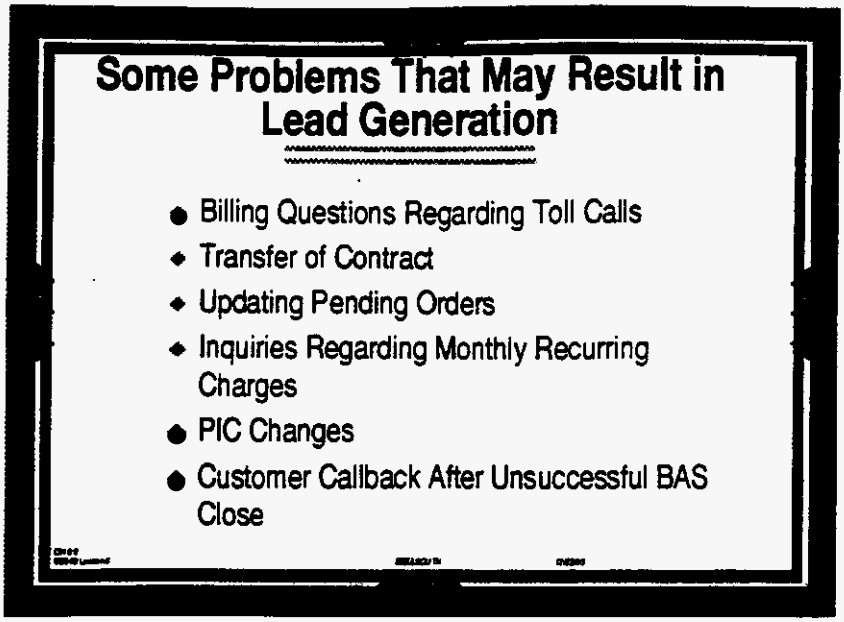
Types of Problems Managed Through Lead Generation

Common Problems Resolved Through Lead Generation



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What is Not a Lead!

Examples of Not a Lead

1. Anytime the customer initiates a request to add, change or delete a specific service, it is not a lead.

   When in doubt, ask yourself:

   Did I initiate the customer's interest in discussion of services to resolve a communications problem or need?

2. **Removal of services**; transfer to the Business Application Specialists to attempt to save.

3. Orders taken by Customer Support Specialist **correcting customer records** (i.e., features in translation, but customer not being billed).

4. Orders to **separate billing.**

5. **Transfer of Contracts**
   - Should customer initiate discussion of additional services at the time of T of C, THIS IS NOT A LEAD.

6. **Intra Company** requests
   - Installer Order
   - BAPCO Order
   - Maintenance/ Repair Center calls to verify if feature is being billed

7. **Updating pending orders** at customer's request to add services.
   - Customer calls to change due date and also want to add services.

8. If the Customer Support Specialist **quotes rates and discloses**, this completes the negotiation of the order and is not a lead.

9. If customer calls and request service extended to another location, (DPA), this is a **misdirected** call.

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Passing a Lead to a BAS

Examples Of Positive Statements To Obtain Permission

In order to pass a call to a BAS you MUST obtain permission from the customer to either forward the call to a BAS or complete a lead generation form for future callback. This can be done in many different ways. In either instance, a lead generation form must be completed.

You can use various transitional phrases. A positive statement may work best. After presenting one example,

Some examples are listed below:

- "I would like you to speak with one of our Business Applications Specialists to determine a solution."
- "I would like you to speak with a Business Applications Specialist."
- "I recommend you speak with a Business Applications Specialist to determine what would be best for you."
- "I recommend you speak with a Business Applications Specialist to analyze your situation and find the best solution."

Once Permission Is Gained Guidelines

After permission is gained, you may transfer, or if the customer prefers (or access requires), a call back/commitment may be established.

Should a commitment be made, offer commitment intervals:

* **If taken today by 11:00 a.m., call by 5:00 p.m. today**
* **After 11:00 a.m. today, call by 12:00 p.m. the next business day**

These are only guidelines, your office commitment guidelines may differ. Be aware of the customer's needs in that he/she may need more/less time for the call back.

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What is a Sale?

Quoted Rates and Discloses

Despite the fact that sales are, in general, a BAS job responsibility, upon occasion, a Customer Support Specialist will gain acceptance to issue an order for new or additional services.

If you support quote rates, this effectively completes the negotiation of an order. **In such a situation, a lead has not been generated, a sale has been consummated.**

Should you gain acceptance from the customer to place the order, you MUST issue the order and follow full disclosure guidelines. In such instances a lead generation form should not be completed.

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JOB-AID

Review For Potential Needs

Customer Support Specialist should always review the following information on the customer records for clues to potential needs:

- **DIRECTORY ADVERTISING IN OTHER CITIES**
- **TOLLS TO SAME CITY**
- **SEVERAL LISTINGS/ ONE LINE**
- **TYPE OF BUSINESS, I.E., REAL ESTATE, PHYSICIAN, ETC.**
- **CUSTOMER DOES NOT SUBSCRIBE TO ANY FEATURES**
- **CHECK MEMOS**

How To Obtain Leads

Phrases to use to obtain a lead may differ with each situation, as well as, each specialist. It is very important to handle the customer's request ENTIRELY and satisfactorily before you attempt a lead generation phrase.

List Of General Phrases/ Questions

In addition to the support tool (flip chart) some additional examples are shown of general phrases and/or questions to use to identify a need and convert to a lead.

1. *You mentioned you were out of the office quite frequently. We may have some services we can offer to help you operate your business more efficiently. Let me have a Business Applications Specialist contact you.*

2. *I have heard you say during our conversation that your customers are important to you. What happens to your customers when your not available?*

3. *How many customers will have your home number?*

4. *You mentioned a concern about your competitors. We have some newer services that may prevent your customers from going to a competitor.*

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JOB-AID, Continued

List Of General Phrases/ Questions (Continued)

5. *In looking at your long distance charges, I feel we can help you realize considerable savings on your calls. Let me have a Business Applications Specialist contact you to discuss the details.*

6. *I noticed you have a lot of calls on your bill and we may be able to lower or reduce your phone bill.*

7. *I know your calls are important to you. How helpful would it be if your calls could follow you anywhere?*

8. *I can order those directories for you. May I ask why you need them?*

9. *Do you have a fax/computer with a modem?*
   - *What happens if you need to use them and a customer is trying to reach you?*
   - *What percent of the day will be spent receiving or sending faxes?*
   - *How many faxes will you be sending/receiving per day?*

10. *Is there anything your phone service is not doing for you that you wish it were?*

11. *Based on what you have said about your service today, it seems you rely heavily on your phone service for revenues. I have a Business Applications Specialist who can help you get the most out of your service.*

12. *Looking at what you have now, what improvements would you want to make/consider making in your service?*

13. *How much would **one** (1) **missed call** affect your business?*

14. *Mr./Ms., how would you like to improve productivity by gaining access to more than one call at a time?*

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JOB-AID, Continued

List Of General Phrases/ Questions (Continued)

15. *How do you handle the calls when you are on the line?*
16. *What happens if one of your drivers on the road has a problem and is unable to get through because of a busy signal?*
17. *You mentioned you are expanding. How do you plan to handle those additional calls?*
18. *How often have your customers told you they have had trouble reaching you? Was the line busy when they called or were you unavailable?*
19. *I noticed this is a real estate/insurance office. How much of the day will your sales force be in the office?*
20. *When your customers reach a busy signal, how many will call your competitor?*
21. *Would you like to get an idea of how many of your calls you may be losing to your competitors?*
22. *Do your customers have a hard time getting through to you? Do you wonder how many calls you have missed?*
23. *Do you find your fax machine ties your line up for extended periods of time?*
24. *Do you find times when you answer the phone and the calls are for your partner (or another person) in your office?*
25. *How important is it that your clients be able to reach you without getting a busy signal?*
26. *You said you have several employees who often use the phone. With only one (1) number, I imagine it would be in use a lot, am I right?*

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Example #1

CSS LEAD FORM

■ Call Back Required
❑ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/8/95

Account #: (504) 822-7810 Call Customer By: 9/9 12:00

Customer Contact Name: Linda Date: _____

Call Back Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other TOO MANY BUSY SIGNALS

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Example #2

CSS LEAD FORM

❑ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/21/95

Account #: (504) 245-1241 Call Customer By: _____
Customer
Contact Name: Liz Date: _____
Call Back
Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
■ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other $200.00 COLLECT CALLS

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Example #3

CSS LEAD FORM

■ Call Back Required
❑ On-Line Transferred

CSS Name: John Doe
CSS User ID: _____
Date: 10/3/95

Account #: (318) 686-1111 Call Customer By: 10/3/95

Customer Contact Name: Mary Kay Date: _____

Call Back Number: (318) 686-1111 Time: _____

Possible Customer Needs

- ❑ FNA
- ❑ Calls Handled When Not Available
- ❑ Missing Calls
- ❑ Reduce Toll Cost
- ❑ Better Internal Communication
- ❑ Increase Market
- ■ Other CUSTOMER OPENING

SATELLITE OFFICE IN 3 MONTHS IN SHREVEPORT
NEEDS TO PLACE ORDER FOR NEW SERVICE

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Example #4

CSS LEAD FORM

☐ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 3/13/95

Account #: (504) 467-0517 Call Customer By: _____

Customer Contact Name: Larry Date: _____

Call Back Number: _____ Time: _____

Possible Customer Needs

- ☐ FNA
- ■ Calls Handled When Not Available
- ☐ Missing Calls
- ☐ Reduce Toll Cost
- ☐ Better Internal Communication
- ☐ Increase Market
- ■ Other NEEDS CALL FORWARDING

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Lesson 7: Q.U.A.R. Methodology: Resolution

HandOut

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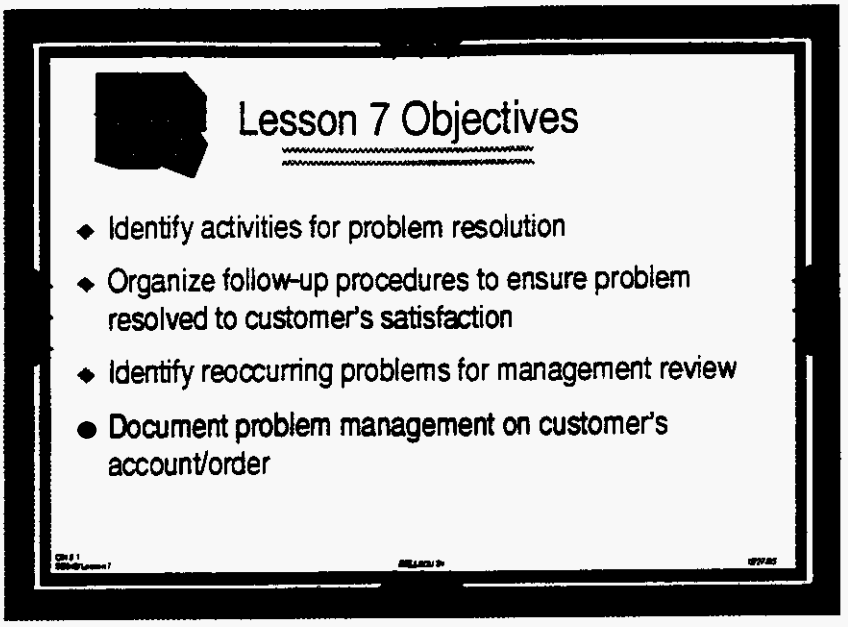
Problem Solving Methodology Resolution

Completing the Customer Interaction

Lesson Introduction



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Completing the Customer Interaction, Continued

Document All Customer Interactions

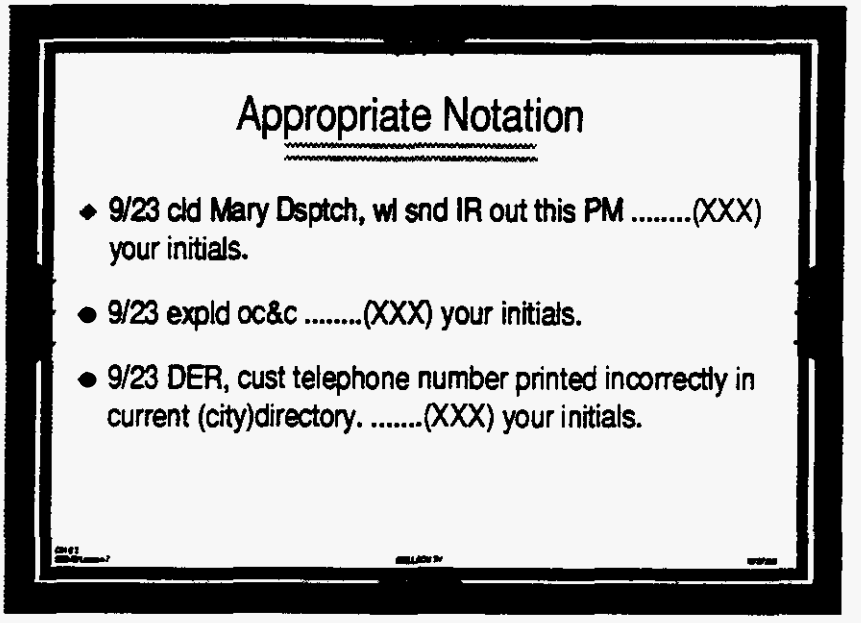
We have studied how to question a customer, understand their specific problem and take action to resolve their problem.

A customer interaction is not complete until their account has been properly noted.

The following should be included in all notation.

- date of contact
- subject of call
- any actions taken
- CSS's initials

Examples of appropriate notation.



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Customer Follow-Up Activities

Follow-Up as Tool to Exceed Customer Expectations

Although one should strive to exceed expectations throughout a customer contact, it is usually the "something a little extra" that typically takes place towards the end of a contact that makes *the difference*

Follow-up is part of the measurement on the customer survey card that the customer gets.

Follow-up Procedure

When a problem has not been completely resolved, a follow-up procedure should be put in place.

Follow up procedures can be customized to suit the individual but should include the following steps:

1. Create a filing system with a file folder for each day of the month (1 - 31).
2. Create a simple data form for you customers needing follow-up. One possibility is to use a lead generation form for all follow-ups, though you should somehow indicate to yourself which customers are lead generation follow-ups and which are general follow-ups.
3. Place data sheets in the appropriate marked day for future follow-up. Use the following guidelines for how many days into the future you should place data sheets.
    - Problems working on own, next day
    - Problems passed to another BellSouth entity, 2 days. Prior to contacting the customer, check the customer's account and/or call the entity (not the individual) that the call was passed to in order to confirm resolution.
    - Unsuccessfully closed lead generation forms, 2 and 4 weeks after form returned to you.
    - Dissatisfied customers whose problem was satisfactorily resolved, but remain unhappy, 3 - 4 days
4. At the beginning of each day review the contents of that day's folder. Advise team manager/team facilitator of any required off-key time necessary to complete outgoing follow-up commitments.

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Customer Follow-Up Activities, Continued

Obtain Statement of Customer Satisfaction

A problem can be "retired" and no further follow-up is required when you have obtained a statement of satisfaction from the customer.

In reality, we do not want to simply satisfy the customer, **we want to delight the customer.**

ASK YOURSELF after each contact "Did I delight that customer and exceed their expectations?"

Impacts of Follow-Up on Appraisals

Follow-up Directly Impacts Appraisals

Follow-up is a great way to have a positive effect on one of the major inputs to your performance appraisal.

- Survey cards
- lead generation (follow-up call is another opportunity to generate a lead)
- team sales revenue figure

are all portions of your family of measures affected by appropriate use of follow-up. These three measures make up to majority of their combined family of measures.

Identify Reoccurring Problems for Management Review

Part of resolving a problem, is taking responsibility for ensuring that repeated problems do not re-occur. Over time, you will begin to spot problems that re-occur consistently. If you identify recurring problems, you should communicate these to your Interface Specialist, Team Facilitator, or Team manager.

The Open Mail system to send memos on re-occurring problems to the Quality Lead Team.

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Lesson 8: Putting It All Together

Hand Out

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Room Set Up

Each corner will be designated as follows:

- A = Pending Order,
- B = Missed Appointment
- C = Billing Question,
- D = Directory Error

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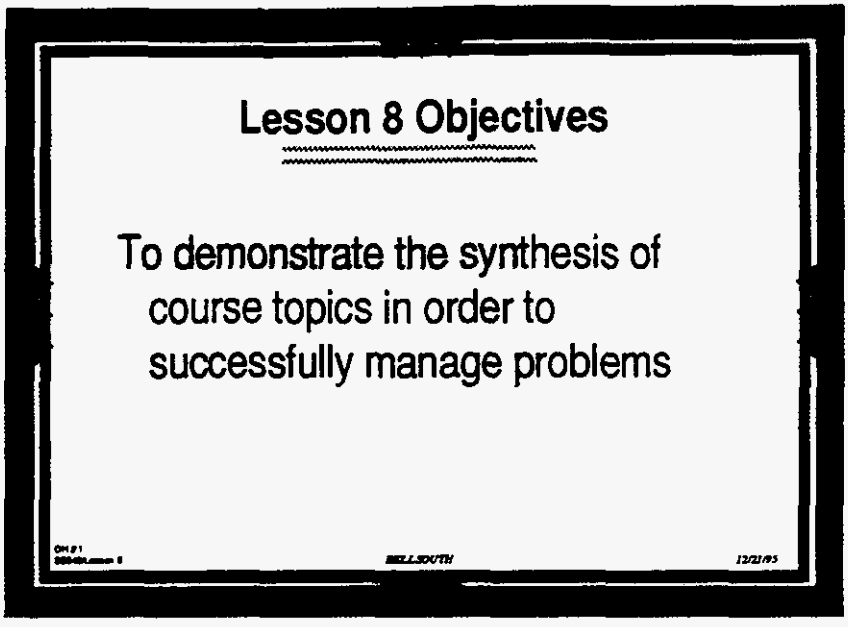
Putting It All Together

Introduction

Objective

Upon completion of this lesson, participants will be able to demonstrate the skills needed to diffuse anger, deal with difficult personalities and solve customer problems in an efficient and effective manner.



Rationale

Rehearsing coping mechanisms, practicing active listening and problem solving skills are critical factors in effectively handling customer problems, thereby promoting and improving customer relations.

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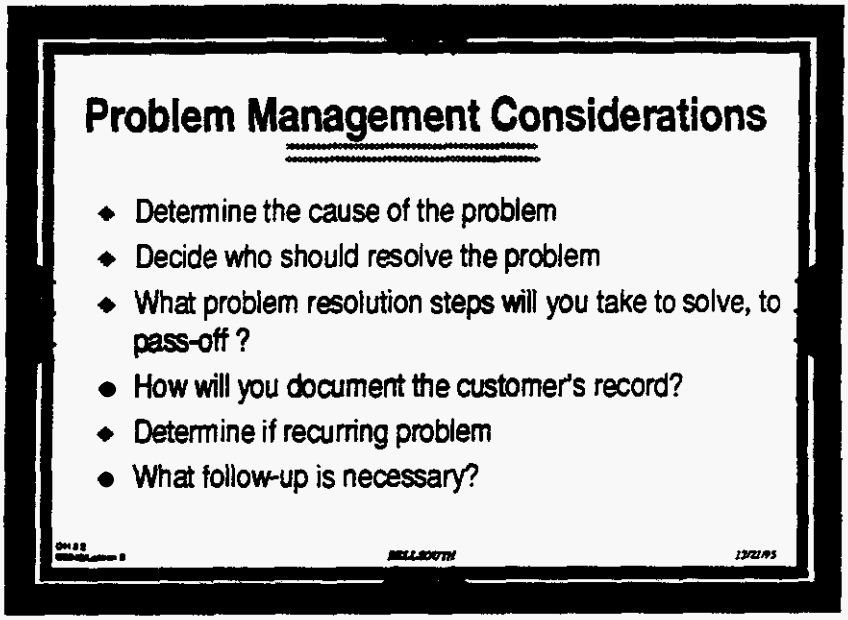
Introduction, Continued

Examples of Problem Resolution

Use the situations appearing on the following page to practivce for the coming roleplays.

- Discuss each of the situations appearing in their handouts with a partner.
- Be prepared to share with class your thoughts on what similar or dissimilar course of action would you recommend given the same situation.
- Keep the following considerations in mind as you throughout the remaining lesson.



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Examples of How to Handle Customer Problems

Pending Orders

I placed an order for business service and I just paid the deposit. I lost the new telephone number but I need to know when my service will be working and what my telephone is.

The Support Specialist located the order by the name, found the deposit number on the TIPS screen and released pending order with a next day appointment. The customer was satisfied with this.

Pending Order: Completed Order not Working

Our business telephone number is still showing on Caller ID's. We had our service restricted so that our number would be blocked and our account could not be accessed by everyone.

When the Support Specialist looked at the customer record, the specialist found that the account was restricted and could only be handled by CPNI group. The customer was on-line transferred to this center and was given correct number to call in future.

Missed Appointment

We ordered business service and the installer left a note that we had to have conduit. I told them that I only wanted the line brought to the building and I would take care of inside. My order wasn't worked and the note advised me to call for another appointment. I need this service worked today.

The Support Specialist checked the order and found that an installer had been dispatched twice and wasn't worked because of conduit. Specialist called WMC and was advised that order would be put back into pool to be worked today since conduit was not needed and only had to bring to building.

Billing Inquiry

I requested a copy of bill and I didn't receive. The billing address was to be corrected. Can you fax me a copy of September bill?

The Support Specialist was not able to get copy of bill to print so could fax to customer. Gave information to interface specialist to have printed and faxed.

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Examples of How to Handle Customer Problems,
Continued

Directory Error *My number wasn't printed in either white or yellow pages of directory. I need to know why and when will be in book and also I need 2 current directories.*

The Support Specialist checked date directory closed and delivery dates and also checked current directory. Advised customer was listed on page 10 of White Pages and listed in Yellow Pages under Arts & Crafts. Specialist also called and ordered 2 current directories to be overnighted to customer. The customer was looking at a 1994 telephone directory that was published before business service was ordered.

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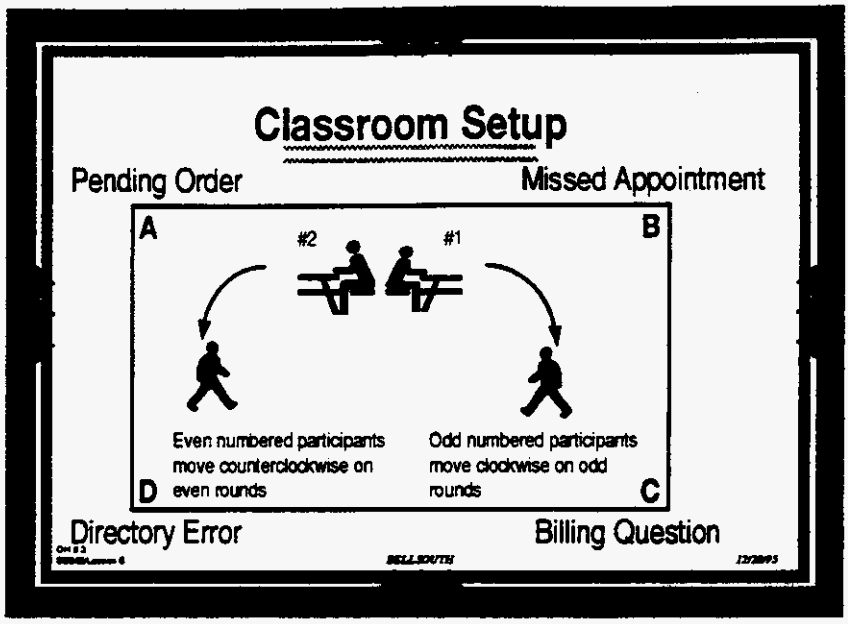
Activity: Structured Role Plays

Instructions

1. Each corner of the classroom will correspond to a category of role play situation as follows:

   A = Pending Order,
   B = Missed Appointment
   C = Billing Question,
   D = Directory Error



Instructions (continued)

3. When instructed, discuss all aspects of your first situation with your partner. (For example: What are all the conditions under which an order might be pending?)

4. Follow the learning advisor's instructions to determine what role you will play in each round of roleplay.

7. The role play will begin with the sound of a phone ringing.

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COMMUNICATION SKILLS FEEDBACK SHEET

Listening/Responding Skills

1. Did specialist provide "door openers?"
   Ex: "Can you tell me more about that?"
   "How so?"
   "Will you give me an example?"

2. Did specialist provide empathic responses?
   Ex: "I can understand how frustrating that would be."

3. Did specialist respond to caller's feelings (expressed either implicitly or explicitly)?
   Ex: "You sound hesitant. Can I explain something further?"

4. Did specialist reflect content accurately?
   Ex: "So what you're saying is... "
   "Let me see if I've got this right..."

Supporting Examples/Comments

Diffusing Anger

1. Did specialist apologize for delays, errors, confusion, etc.?
   Ex: "I apologize for the miscommunication."

2. Did specialist request information rather than demand it?
   Ex: "Will you spell that for me?"

3. Did specialist provide options for caller?
   Ex: "Would you prefer to hold or shall I call you back?"

Supporting Examples/Comments

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Vocal Qualities

1. Did specialist use appropriate vocabulary?
   Was specialist asked to define terms used?
   Did caller sound confused by terminology?

2. Was specialist's speech clear? Did caller ask specialist to repeat words?

3. Was appropriate tempo used? Too fast? Too slow?

4. Did specialist sound interested? Was voice expressive?

Supporting Examples/Comments

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Q.U.A.R. Methodology Checklist

Short description of customer problem:

_____

_____

QUESTIONING

1. Did specialist greet customer in a friendly tone of voice? What was said?

2. What did specialist say to identify themselves and thank customer for calling BellSouth?

3. Did specialist use an effective mix of open-ended and closed questions? Give example of both.

UNDERSTANDING

1. Did specialist respond appropriately to customer's state of mind? What was customer's state of mind?

2. Did specialist repeat a good problem statement to the customer? Write it below.

3. Did specialist solicit the customer's agreement on his/her re-statement of the problem?

ACTION

1. How did the specialist inform the customer about the specialist's plan of action?

2. How did the specialist handle situation when "wild card" was presented by the instructor?

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Q.U.A.R. Methodology Checklist, continued

3. Did the specialist quickly identify the correct resolution process, including who, if anyone, he/she should partner with to resolve the problem? Describe the plan of action.

4. What actions did specialist take to identify additional needs for lead generation?

RESOLUTION

1. What was the service commitment made to the customer?

2. How did the specialist obtain a statement of customer satisfaction?

3. What did specialist say/do to thank customer for doing business with BellSouth?

4. What were the follow-up arrangements made by the specialist?

5. How did specialist note account?

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Lesson 6: Q.U.A.R. Methodology: Taking Action - Lead Generation

Handout

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Taking Action - Lead Generation

Overview

Purpose

Improve customer satisfaction and create loyalty by developing guidelines for creating a lead versus finalizing a sale.

Objective

To obtain leads, the Customer Support Specialist identifies customer telephone **NEEDS** through general phrases and open-ended questions without intentionally targeting or naming a product.

ADVANTAGES:

- Improves customer satisfaction
- Improves access
- Increases revenue
- Relieves support specialist of individual sales responsibilities, allowing them to focus on support functions
- Keeps customer open-minded
- Prevents oversell/ overkill/ double talk
- Increases consultative selling power by the business applications specialists

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Overview, Continued

Lesson Introduction

Lead Generation - Objectives

- Define the lead generation process
- Identify problem types best resolve through lead generation
- Identify what qualifies as a lead
- Identify what does not qualify as a lead
- Correctly reproduce a lead generation form

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What is a Lead?

Definition of Lead Generation

A Lead Is

When the CSS **INITIATES** the Customer's Interest in Discussion of Services to Resolve a Communications Problem

- A lead can solve a customer's problem
- A lead can be generated for a service or product unrelated to the original problem but uncovered during the process of problem management

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What is a Lead?, Continued

Lead Generation Improves Customer Satisfaction

- Improves access
- Increases revenue
- Relieves support specialist of individual sales responsibilities, allowing them to focus on support functions
- Keeps customer open-minded
- Prevents oversell/overkill/double talk
- Increases consultative selling power by the business applications specialists

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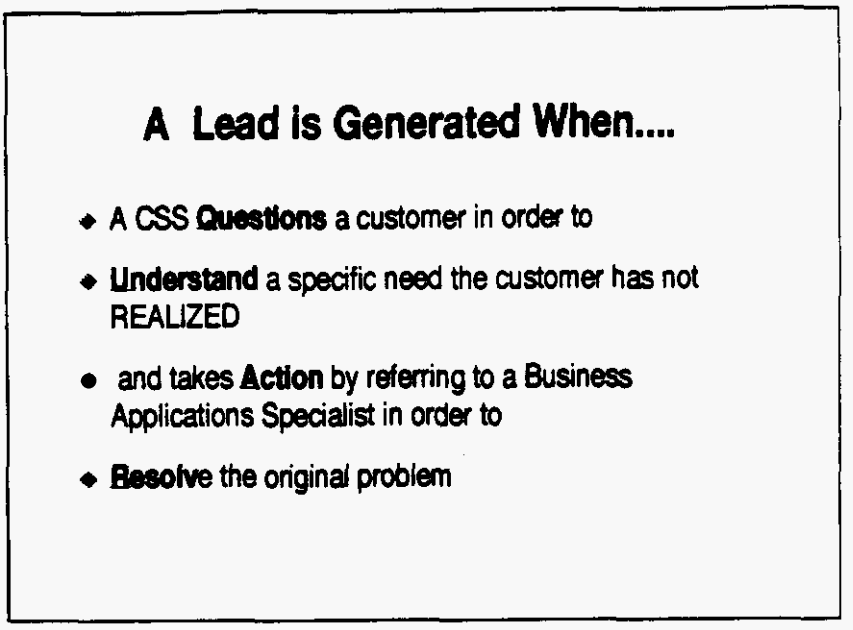
What is a Lead?, Continued

INTRODUCE overhead



Lead generation is one form of successfully using the QUAR process. It is very important to follow all the methodology's steps before attempting to resolve the customer's problem via the lead generation process.

Only after rapport has been established, and the customer's problem is fully understood is the customer apt to listen to our recommendations.

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The Lead Generation Process

How Leads Are Recorded

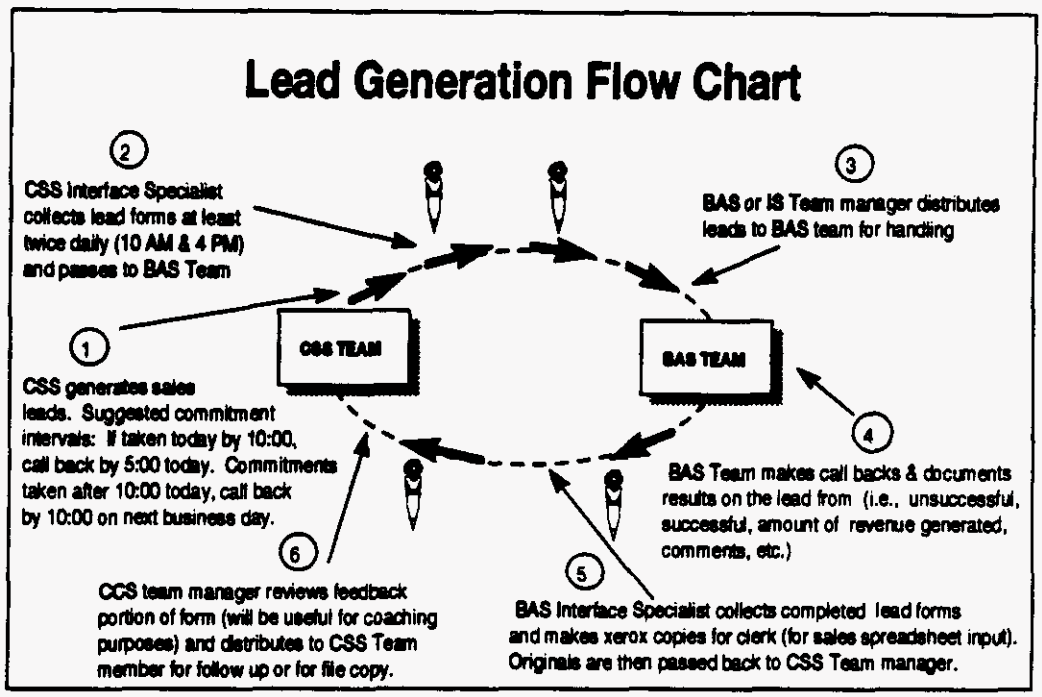
A specialist will receive one (1) lead referral credit, per customer, for **successful** sales. Remember leads that do not result in a sale on the part of a BAS do not count as leads for the CSS.

EXAMPLE:

If the CSS speaks with one (1) customer and the needs identified may apply to five (5) Customer Service Records, the specialist will receive one (1) credit.

Lead Generation Process Flow

DESCRIBE the process that a lead generation sheet goes through using the accompanying slide.



This process can differ from state to state.

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The Lead Generation Process, Continued

Examples of Problem Types Managed Through Sales Lead Process

1. **BILLING QUESTIONS**

Customer calls in about toll calls. Customer Support Specialist answers customer's questions and realizes customer may be able to use some of our services.

> *"Mr. Customer, in looking at your calling patterns, I believe we have some services that could possibly help you save money on your toll calls. I recommend a Business Applications Specialist speak with you."*

The Customer Support Specialist completes a LEAD GENERATION FORM and under the SUPPORTING COMMENTS portion states:

> **SUPPORTING COMMENTS:**
> - Customer has $50.00 of tolls to XYZ city and is interested in services that would save him money.

2. **TRANSFER OF CONTRACT**

Customer calls requesting telephone number in his name, but does not request any additional services. Talk to the customer about his needs as a new customer.

NOTE: Something is changing since the owners will change and new people are responsible. Ask questions such as:

- "Mr. Customer, How will you be using the service when it is in your name?'
- "Mr. Customer, Now that you are the new owner, what changes would you like to see in your service?"
- "Now that you have had the service for a while, what changes need to be made?"

> One a need is discovered on the T of C, you must determine at what point to prepare the lead generation form. Remember, the T of C should be finalized before the new owner may make changes to his/her services.

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The Lead Generation Process, Continued

3. UPDATING PENDING ORDER

When updating a pending order, if the customer asks for a service, this is not a lead. When updating an order and discovering a need, the Customer Support Specialist should on-line transfer or make a commitment for the Business Applications Specialist. This is a lead. A lead form should be sent.

4. MONTHLY RECURRING CHARGE

Leads are not determined solely by sales revenue. Services that carry a monthly recurring charge yet do not generate sales credit, such as a lead that results in an off premises extension or a trunk on a PBX, are considered leads.

5. CUSTOMER INITIATED CALLBACK

When a lead is closed unsuccessfully by a BAS, and the customer calls back to place the same order, it will become a successful lead. However, it is the Customer Support Specialist's responsibility to follow-up and refer to the designated tracker to receive credit. The CSS should keep a file of all unsuccessful leads and check them weekly for 4 weeks.

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The Lead Generation Process, Continued

Miscellaneous Information

In order to ensure that you receive credit for all leads generated you should take 2 actions:

1. Complete a lead generation form
2. In ALL Instances, the Customer Support Specialist should note the account of a lead referral.

When attempting to transfer to a BAS in order to complete the sale and all BAS lines are busy and the customer insists on completing the transaction;

- CSS completes the sale and issues order
- CSS does not complete a lead generation form
- CSS does not receive credit for lead, but office does receive credit for sale

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Types of Problems Managed Through Lead Generation

Common Problems Resolved Through Lead Generation

Some Problems That May Result in Lead Generation

- Billing Questions Regarding Toll Calls
- Transfer of Contract
- Updating Pending Orders
- Inquiries Regarding Monthly Recurring Charges
- PIC Changes
- Customer Callback After Unsuccessful BAS Close

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What is Not a Lead!

Examples of Not a Lead

1. Anytime the customer initiates a request to add, change or delete a specific service, it is not a lead.

   When in doubt, ask yourself:

   Did I initiate the customer's interest in discussion of services to resolve a communications problem or need?

2. **Removal of services**; transfer to the Business Application Specialists to attempt to save.

3. Orders taken by Customer Support Specialist **correcting customer records** (i.e., features in translation, but customer not being billed).

4. Orders to **separate billing**.

5. **Transfer of Contracts**
   - Should customer initiate discussion of additional services at the time of T of C, THIS IS NOT A LEAD.

6. **Intra Company** requests
   - Installer Order
   - BAPCO Order
   - Maintenance/ Repair Center calls to verify if feature is being billed

7. **Updating pending orders** at customer's request to add services.
   - Customer calls to change due date and also want to add services.

8. If the Customer Support Specialist **quotes rates and discloses**, this completes the negotiation of the order and is not a lead.

9. If customer calls and request service extended to another location, (DPA), this is a **misdirected** call.

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Passing a Lead to a BAS

Examples Of Positive Statements To Obtain Permission

In order to pass a call to a BAS you MUST obtain permission from the customer to either forward the call to a BAS or complete a lead generation form for future callback. This can be done in many different ways. In either instance, a lead generation form must be completed.

You can use various transitional phrases. A positive statement may work best. After presenting one example,

Some examples are listed below:

- "I would like you to speak with one of our Business Applications Specialists to determine a solution."
- "I would like you to speak with a Business Applications Specialist."
- "I recommend you speak with a Business Applications Specialist to determine what would be best for you."
- "I recommend you speak with a Business Applications Specialist to analyze your situation and find the best solution."

Once Permission Is Gained Guidelines

After permission is gained, you may transfer, or if the customer prefers (or access requires), a call back/commitment may be established.

Should a commitment be made, offer commitment intervals:

- **If taken today by 11:00 a.m., call by 5:00 p.m. today**
- **After 11:00 a.m. today, call by 12:00 p.m. the next business day**

These are only guidelines, your office commitment guidelines may differ. Be aware of the customer's needs in that he/she may need more/less time for the call back.

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What is a Sale?

Quoted Rates and Discloses

Despite the fact that sales are, in general, a BAS job responsibility, upon occasion, a Customer Support Specialist will gain acceptance to issue an order for new or additional services.

If you support quote rates, this effectively completes the negotiation of an order. **In such a situation, a lead has not been generated, a sale has been consummated**.

Should you gain acceptance from the customer to place the order, you MUST issue the order and follow full disclosure guidelines. In such instances a lead generation form should not be completed.

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JOB-AID

Review For Potential Needs

Customer Support Specialist should always review the following information on the customer records for clues to potential needs:

- **DIRECTORY ADVERTISING IN OTHER CITIES**
- **TOLLS TO SAME CITY**
- **SEVERAL LISTINGS/ ONE LINE**
- **TYPE OF BUSINESS, I.E., REAL ESTATE, PHYSICIAN, ETC.**
- **CUSTOMER DOES NOT SUBSCRIBE TO ANY FEATURES**
- **CHECK MEMOS**

How To Obtain Leads

Phrases to use to obtain a lead may differ with each situation, as well as, each specialist. It is very important to handle the customer's request ENTIRELY and satisfactorily before you attempt a lead generation phrase.

List Of General Phrases/ Questions

In addition to the support tool (flip chart) some additional examples are shown of general phrases and/or questions to use to identify a need and convert to a lead.

1. *You mentioned you were out of the office quite frequently. We may have some services we can offer to help you operate your business more efficiently. Let me have a Business Applications Specialist contact you.*

2. *I have heard you say during our conversation that your customers are important to you. What happens to your customers when your not available?*

3. *How many customers will have your home number?*

4. *You mentioned a concern about your competitors. We have some newer services that may prevent your customers from going to a competitor.*

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JOB-AID, Continued

List Of General Phrases/ Questions (Continued)

5. *In looking at your long distance charges, I feel we can help you realize considerable savings on your calls. Let me have a Business Applications Specialist contact you to discuss the details.*

6. *I noticed you have a lot of calls on your bill and we may be able to lower or reduce your phone bill.*

7. *I know your calls are important to you. How helpful would it be if your calls could follow you anywhere?*

8. *I can order those directories for you. May I ask why you need them?*

9. *Do you have a fax/computer with a modem?*
   - *What happens if you need to use them and a customer is trying to reach you?*
   - *What percent of the day will be spent receiving or sending faxes?*
   - *How many faxes will you be sending/receiving per day?*

10. *Is there anything your phone service is not doing for you that you wish it were?*

11. *Based on what you have said about your service today, it seems you rely heavily on your phone service for revenues. I have a Business Applications Specialist who can help you get the most out of your service.*

12. *Looking at what you have now, what improvements would you want to make/consider making in your service?*

13. *How much would **one** (1) **missed call** affect your business?*

14. *Mr./Ms., how would you like to improve productivity by gaining access to more than one call at a time?*

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JOB-AID, Continued

List Of General Phrases/ Questions (Continued)

15. *How do you handle the calls when you are on the line?*
16. *What happens if one of your drivers on the road has a problem and is unable to get through because of a busy signal?*
17. *You mentioned you are expanding. How do you plan to handle those additional calls?*
18. *How often have your customers told you they have had trouble reaching you? Was the line busy when they called or were you unavailable?*
19. *I noticed this is a real estate/insurance office. How much of the day will your sales force be in the office?*
20. *When your customers reach a busy signal, how many will call your competitor?*
21. *Would you like to get an idea of how many of your calls you may be losing to your competitors?*
22. *Do your customers have a hard time getting through to you? Do you wonder how many calls you have missed?*
23. *Do you find your fax machine ties your line up for extended periods of time?*
24. *Do you find times when you answer the phone and the calls are for your partner (or another person) in your office?*
25. *How important is it that your clients be able to reach you without getting a busy signal?*
26. *You said you have several employees who often use the phone. With only one (1) number, I imagine it would be in use a lot, am I right?*

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Example #1

CSS LEAD FORM

■ Call Back Required
❑ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/8/95

Account #: (504) 822-7810 Call Customer By: 9/9 12:00

Customer Contact Name: Linda Date: _____

Call Back Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other TOO MANY BUSY SIGNALS

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Example #2

CSS LEAD FORM

❑ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/21/95

Account #: (504) 245-1241 Call Customer By: _____

Customer Contact Name: Liz Date: _____

Call Back Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
■ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other $200.00 COLLECT CALLS

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Example #3

CSS LEAD FORM

■ Call Back Required CSS Name: John Doe
❑ On-Line Transferred CSS User ID: _____
Date: 10/3/95

Account #: (318) 686-1111 Call Customer By: 10/3/95

Customer Contact Name: Mary Kay Date: _____

Call Back Number: (318) 686-1111 Time: _____

Possible Customer Needs

- ❑ FNA
- ❑ Calls Handled When Not Available
- ❑ Missing Calls
- ❑ Reduce Toll Cost
- ❑ Better Internal Communication
- ❑ Increase Market
- ■ Other CUSTOMER OPENING

SATELLITE OFFICE IN 3 MONTHS IN SHREVEPORT
NEEDS TO PLACE ORDER FOR NEW SERVICE

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Example #4

CSS LEAD FORM

❑ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 3/13/95

Account #: (504) 467-0517 Call Customer By: _____

Customer Contact Name: Larry Date: _____

Call Back Number: _____ Time: _____

Possible Customer Needs

❑ FNA
■ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other NEEDS CALL FORWARDING

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LAG.

BELLSOUTH®

Problem Management
SB042

Learning Advisor Guide
Issue 1 - December 1995

Performance Improvement Department

NAME: Richard Nixon **NAME:** Hillary Clinton
TEL: 404/ 288-5043 **TEL:** 770/ 925-7358

TYPE OF BUSINESS: HR Consultant Service

BILLING/ OC&C EXPLANATION
Called to disconnect two (2) months ago.
Still receiving regular bill.

MISSED APPOINTMENT - (SP)
Need to change due date because of new construction.
It was scheduled for next week.-- it is ready now.
Can be worked tomorrow.

PENDING - (ZNB)
Service Tech calling - need to check eligibility of Service Plan

DIRECTORY
Telephone number is listed wrong in the book.

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Data Cards

NAME: Carolyn Patton
TEL: 770/ 482-3982

NAME: Virgil M. Patterson
TEL: 770/ 343-9715

TYPE OF BUSINESS: Complete Courier Services

BILLING/ OC&C EXPLANATION
Other charges and credits questioned.

MISSED APPOINTMENT - (PF)
Was told to work TDA - what happened?

PENDING
Ordered Call Return - *69.
Due TDA - not working.

DIRECTORY
Can't find ad in yellow pages.

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NAME: Marilyn Monroe
TEL: 404/ 321-2701

NAME: Vince Gill
TEL: 404/ 233-3462

TYPE OF BUSINESS: Musimatic Electronics

BILLING/ OC&C EXPLANATION
Question about I.D. calls on BellSouth bill.
Calling card lost.

MISSED APPOINTMENT - (CL)
Order was due yesterday.
I still don't have service.
Have to call from business next door.

PENDING
Calling to make sure service is worked at new location
Not there calling from old location.

DIRECTORY
Address is incomplete in book - left off numbers of building.

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NAME: Annie Zachery **NAME:** Harry Younker
TEL: 404/ 627-0027 **TEL:** 770/ 973-5507

TYPE OF BUSINESS: Cowpuncher's Palace

BILLING/ OC&C EXPLANATION
Requested copy of bill that was never received.
Need it faxed today.

MISSED APPOINTMENT - (SA)
Had TAG to call Business Office for new appointment.
Wanted worked today.

PENDING
Paid deposit today to get new service.
When can it get worked?

DIRECTORY
That page is blank in my book - (No printing on it at all).

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Customer Wild Cards

Complain about your customers.

Get frustrated by how long the call is taking.

Play dumb.

"I don't understand what you're talking about".

You are distracted by an outside noise.

Start mumbling so the Specialist can't understand you.

You can't understand the Specialist.
Ask him/ her to repeat herself a number of times.

Someone from your office interrupts you with a question.

Use a dialect or accent, if you can.

Criticize BellSouth.

Talk about your business.

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Specialist Clue Cards

Notation on account.

Eligible/ non-eligible.

Notation for deposit.

No due date assigned to order.

Yellow page ad misprinted.

Bill has eight (8) days previous month.
OC&C charges.

Account noted that disputed calls are to a residence with same last name.

No disconnect recorded to final bill rendered.

No one at address when arrived.
(Time on order 10.00 am - 3:00 pm).

Order turned back by installer at 6:15 pm - C/L

No wire facilities available in Store Center - PE

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Appendix A

Role-play Information
Deck of Cards

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Specialist Wildcards

System goes down.

Someone is tapping on shoulder with questions.

System is very slow.

Break Time

End of Day

Supervisor yells, "I need everyone open (access)"!

Conversation around you is too loud.

Internal party puts you on internal hold.

Head set stops working.

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Vocal Qualities

1. Did specialist use appropriate vocabulary?
   Was specialist asked to define terms used?
   Did caller sound confused by terminology?

2. Was specialist's speech clear? Did caller ask specialist to repeat words?

3. Was appropriate tempo used? Too fast? Too slow?

4. Did specialist sound interested? Was voice expressive?

Supporting Examples/Comments

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Q.U.A.R. Methodology Checklist

Short description of customer problem:

_____

_____

QUESTIONING

1. Did specialist greet customer in a friendly tone of voice? What was said?
2. What did specialist say to identify themselves and thank customer for calling BellSouth?
3. Did specialist use an effective mix of open-ended and closed questions? Give example of both.

UNDERSTANDING

1. Did specialist respond appropriately to customer's state of mind? What was customer's state of mind?
2. Did specialist repeat a good problem statement to the customer? Write it below.
3. Did specialist solicit the customer's agreement on his/her re-statement of the problem?

ACTION

1. How did the specialist inform the customer about the specialist's plan of action?
2. How did the specialist handle situation when "wild card" was presented by the instructor?
3. Did the specialist quickly identify the correct resolution process, including who, if anyone, he/she should partner with to resolve the problem? Describe the plan of action.
4. What actions did specialist take to identify additional needs for lead generation?

RESOLUTION

1. What was the service commitment made to the customer?
2. How did the specialist obtain a statement of customer satisfaction?
3. What did specialist say/do to thank customer for doing business with BellSouth?
4. What were the follow-up arrangements made by the specialist?
5. How did specialist note account?

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b. Talkative/Chatty

Your department has been reorganized and you've been reassigned to a new position. Instead of being in the front office, you're in a cubicle by yourself with little social interaction. You've always been someone who loves to be with others, and share stories. Actually, you're going a little stir-crazy now without anyone to talk to. Luckily, you have a number of phone calls to make.

V. Panicked/Hysterical

This time of year is always intense for you with deadlines to meet. Buying a new house has added to your stress. You've never done well with handling multiple priorities and feel overwhelmed. Unfortunately, delegation is out of the question and you have a major project that needs to be completed by the end of the week. You have no idea how you're going to pull it off! Just one more task is going to put you over the edge.

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COMMUNICATION SKILLS FEEDBACK SHEET

Listening/Responding Skills

1. Did specialist provide "door openers?"
   Ex: "Can you tell me more about that?"
   "How so?"
   "Will you give me an example?"

2. Did specialist provide empathic responses?
   Ex: "I can understand how frustrating that would be."

3. Did specialist respond to caller's feelings (expressed either implicitly or explicitly)?
   Ex: "You sound hesitant. Can I explain something further?"

4. Did specialist reflect content accurately?
   Ex: "So what you're saying is... "
   "Let me see if I've got this right..."

Supporting Examples/Comments

Diffusing Anger

1. Did specialist apologize for delays, errors, confusion, etc.?
   Ex: "I apologize for the miscommunication."

2. Did specialist request information rather than demand it?
   Ex: "Will you spell that for me?"

3. Did specialist provide options for caller?
   Ex: "Would you prefer to hold or shall I call you back?"

Supporting Examples/Comments

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CUSTOMER PERSONALITY PROFILES

I. Irate

a. Hostile/Abusive

This has been one of the worst weeks you can recall. Business is slow and your supervisor has been on a rampage, criticizing your work and complaining about everything. You're physically run down and feel as if you are getting the flu. To make matters worse, your car was "rear-ended" yesterday while you were stuck in traffic and now you have to deal with insurance adjusters and body shop mechanics. Your boss has been nagging you about contacting the phone company and you can't delay that call any more. You just want to scream!

b. Cold/Seething

Nothing is going well for you right now! The more you work, the less credit you get. The office politics are fierce and the "back biting" is getting worse. Lately, you've been protecting yourself more, keeping your distance. Although others see you as aloof, you just can't trust anyone with your feelings or ideas. You were recently overlooked for a promotion but can't show your anger or disappointment since you've heard rumors of downsizing.

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II. Demanding

You consider yourself a very efficient and high energy person and believe that being tough and driving a hard bargain have contributed to your success. You have little tolerance for procrastinators, or "slackers," as you call them, and put government workers and utility employees in that category. Your experience is that if you're soft with *those people*, they will just take advantage of you. After all, you say to yourself, " The squeaky wheel gets the most grease."

III. Indecisive/Hesitant

How you hate all these extra tasks your boss assigns, especially when you have to make decisions that affect the whole office! You're never sure you've looked at all the angles, considered all the possibilities. Lately, even the smallest decision seems to cause you stress. With the recent divorce, the extra responsibilities at home are taking their toll; your self confidence is shaken. Perhaps you can delay making any major decisions until you feel stronger.

IV. Comfortable

a. Dense/Slow

You're a slow but steady worker who has been appreciated for your loyalty and dependability. Luckily, your job hasn't changed much in the past number of years the way others have. You've been able to avoid having a computer on your desk; those things just baffle you! Maintaining the status quo is good enough for you. After all, retirement is just a few years away and you're looking forward to fewer demands and pressures.

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Activity: Structured Role Plays, Continued

Facilitator Instructions (continued)

3. Allow each team ten minutes to discuss their situation, including contingencies. (For example: What are all the conditions under which an order might be pending?)

   The #1 participants will play the role of specialist and #2's will be the customers for the first and third round of role plays. These roles will be reversed in the second and fourth round of role plays, i.e., #2's will play specialists. The odd member on a three-member team should be assigned the role of coach. (That individual should play "observer" only one time, however).

4. Reassemble the class for "show time." Place chairs (back-to-back) in front of the room and invite one group to sit.

5. Allow the participant playing the customer to choose one blue data card and one yellow profile card. These cards will give the customer details about his/her situation as well as his/her state of mind.

6. Randomly assign the communication skills feedback sheet and Q.U.A.R. problem solving checklist to two observers to complete. (For subsequent role plays, rotate this assignment to ensure everyone gets an opportunity to perform this task).

7. Begin video tape recording the role play with the sound of a phone ringing.

8. Allow the role play to progress providing the specialist green clue cards and either the specialist or customer pink wild cards as needed. Green clue cards will replace information provided by the system or another employee who may participate with specialists in problem resolution in "real life" situations.

   Pink wild cards should be dispensed when the participants are at an impasse, straying from their roles or the customer is being too placating. (You may also feed the players lines, if necessary).

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Activity: Structured Role Plays, Continued

Facilitator Instructions (continued)

9. When the role play is completed (a resolution established), ask the players how they felt in their roles.

10. Replay the audio portion of the recording of the role play.

11. Lead a feedback discussion about the role play, first inviting the participant who played the specialist to evaluate him/herself. Those who have been assigned feedback checklists should then read their evaluations. Next, invite others to evaluate the role play. Ask *all* participants (including the role players) to begin their feedback stating the positives, after which they may make suggestions for improvement. Use a second playing of the video tape with both audio and visual should instructor seek to demonstrate poor posture as reason behind poor tonal quality.

12. Close the feedback session by thanking and applauding the role players and giving the feedback sheets to the player who was the specialist.

13. Proceed to the next team and follow steps 5-12.

14. After all teams have presented, ask #1 participants to change corners moving *clockwise* and #2's to remain (1A will then become 1B and so on). This pattern will be repeated after round three, as well. If one team contains two #1's, one should move in the opposite direction, i.e., counterclockwise.

    After round two of role plays, #2 participants will change corners moving *counterclockwise* and #1's will remain; however, if one team contains two #1's, one should move clockwise. (The goal is to expose participants to as many different situations and personalities as possible).

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Examples of How to Handle Customer Problems, Continued

Directory Error

My number wasn't printed in either white or yellow pages of directory. I need to know why and when will be in book and also I need 2 current directories.

The Support Specialist checked date directory closed and delivery dates and also checked current directory. Advised customer was listed on page 10 of White Pages and listed in Yellow Pages under Arts & Crafts. Specialist also called and ordered 2 current directories to be overnighted to customer. The customer was looking at a 1994 telephone directory that was published before business service was ordered.

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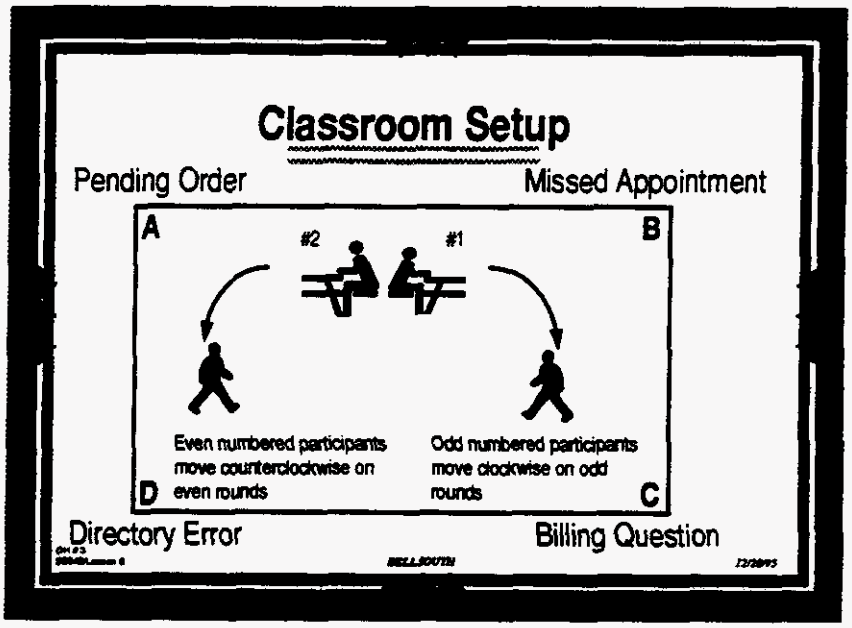
Activity: Structured Role Plays

Facilitator Instructions

1. Pair participants in groups of two, assigning members #1 or #2, alternately. (If class contains an odd number of participants, assign one team a third member. That team will have two #1's and one #2).

2. Assign each group a corner of the room, designated A, B, C, or D. Each corner will correspond to a category of role play situation as follows:

   A = Pending Order,
   B = Missed Appointment
   C = Billing Question,
   D = Directory Error



(Please note: Since the directory problem will be role-played only once, the D team should be given an orange card describing a new situation for each subsequent round of role plays: rounds 2, 3, and 4).

When class contains odd-number of participants, assign the three-member team to the "A" corner for the first round of role plays. If class has fewer then 8 participants, only three teams can be formed. In these cases, rotate problem types between the three groups. Refer participants to list of discussion questions located in their handout.

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Introduction, Continued

Examples of Problem Resolution

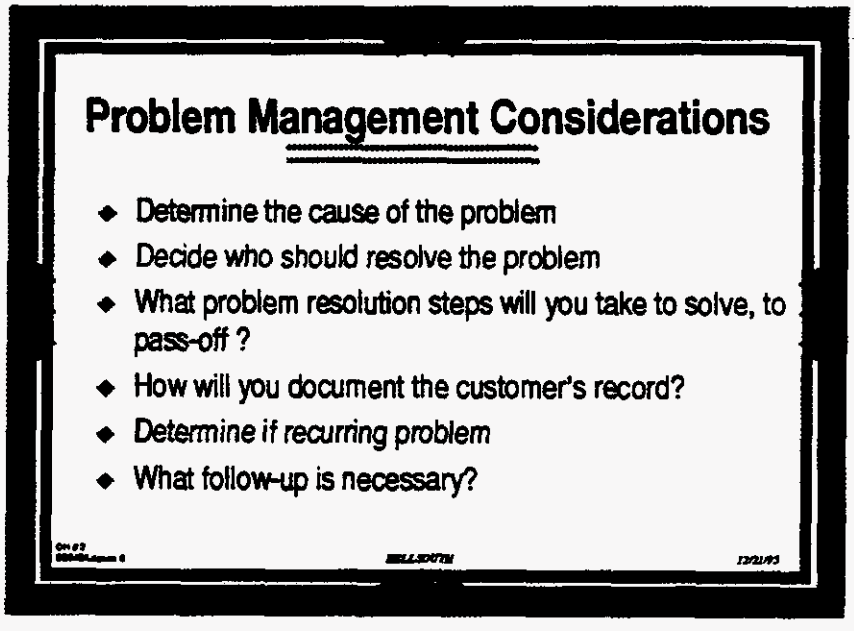
INFORM participants that this is a lead in to the final portion of the course. The role-play activity, which will end the course, will provide them with the opportunity to exhibit the skills and knowledge accumulated throughout the course.

INSTRUCT participants to:

- Discuss each of the situations appearing in their handouts with a partner.
- Use these examples as preparation for the role-play activity to follow.
- Be prepared to share with class their thoughts on what similar or dissimilar course of action they would recommend given the same situation.

STATE: If you have any questions regarding the actions of the specialist in any of the situations, please do not hesitate to ask.

ASK participants to keep the following in mind during review:



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Examples of How to Handle Customer Problems

Pending Orders

I placed an order for business service and I just paid the deposit. I lost the new telephone number but I need to know when my service will be working and what my telephone is.

The Support Specialist located the order by the name, found the deposit number on the TIPS screen and released pending order with a next day appointment. The customer was satisfied with this.

Pending Order: Completed Order not Working

Our business telephone number is still showing on Caller ID's. We had our service restricted so that our number would be blocked and our account could not be accessed by everyone.

When the Support Specialist looked at the customer record, the specialist found that the account was restricted and could only be handled by CPNI group. The customer was on-line transferred to this center and was given correct number to call in future.

Missed Appointment

We ordered business service and the installer left a note that we had to have conduit. I told them that I only wanted the line brought to the building and I would take care of inside. My order wasn't worked and the note advised me to call for another appointment. I need this service worked today.

The Support Specialist checked the order and found that an installer had been dispatched twice and wasn't worked because of conduit. Specialist called WMC and was advised that order would be put back into pool to be worked today since conduit was not needed and only had to bring to building.

Billing Inquiry

I requested a copy of bill and I didn't receive. The billing address was to be corrected. Can you fax me a copy of September bill?

The Support Specialist was not able to get copy of bill to print so could fax to customer. Gave information to interface specialist to have printed and faxed.

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Instructor Materials

- Deck of cards comprised of the following:
  - Orange example situation cards
  - Blue data cards
  - Yellow profile cards
  - Green clue cards
  - Pink wild cards
- Communication Skills Feedback Sheet
- Q.U.A.R. Problem Solving Checklist

Equipment Required

Overhead Projector
Video Tape Recorder
Tape Recorder
VCR

Room Set Up

Position students close to the front of the room for maximum interaction with Learning Advisor. Provide additional seating in corners of room for groups of two to three to use for role-plays. Each corner will be designated as follows:

- A = Pending Order,
- B = Missed Appointment
- C = Billing Question,
- D = Directory Error

Preparation Steps

Read through all learning advisor and participant materials
Test video equipment
Record the sound of a phone ringing

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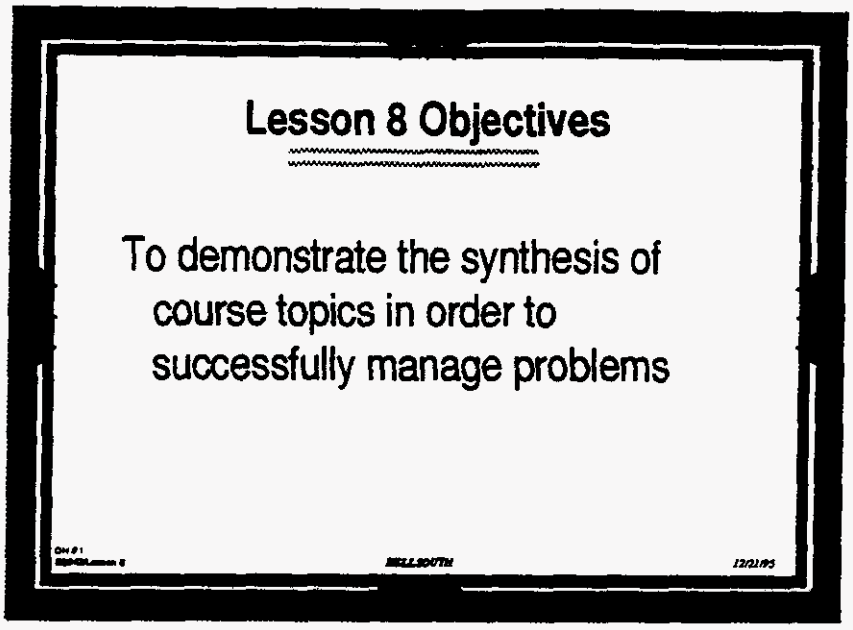
Putting It All Together

Introduction

Objective

Upon completion of this lesson, participants will be able to demonstrate the skills needed to diffuse anger, deal with difficult personalities and solve customer problems in an efficient and effective manner.



Rationale

Rehearsing coping mechanisms, practicing active listening and problem solving skills are critical factors in effectively handling customer problems, thereby promoting and improving customer relations.

LEARNING ADVISOR NOTE: The following are summaries of real customer calls and the course of action the CSS who was serving the customer took in response to each customer problem. Participants will have 20 minutes to review this material.

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Lesson 8: Putting It All Together

Learning Advisor Guide

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Customer Follow-Up Activities, Continued

Obtain Statement of Customer Satisfaction

ASK participants what should be the end result of a follow-up call? or How will you know as a specialist that a problem can be "retired" and no further follow-up is required?

LEAD conversation to:

When the CSS has obtained a statement of satisfaction from the customer.

EMPHASIZE that in reality, we do not want to simply satisfy the customer, **we want to delight the customer.**

ASK participants for ideas on how to delight the customer.

ASK participants to ask themselves after each contact "Did I delight that customer and exceed their expectations?"

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Impacts of Follow-Up on Appraisals

Follow-up Directly Impacts Appraisals

EXPLAIN to specialists, that follow-up is a great way to have a positive effect on one of the major inputs to your performance appraisal.

INSTRUCT participants to recall their family of measures lesson from the curriculum introduction.

ASK participants what portion of their family of measures is affected by appropriate use of follow-up?

LEAD discussion to:

- Survey cards
- lead generation (follow-up call is another opportunity to generate a lead)
- team sales revenue figure

EMPHASIZE that these three measures make up to majority of their combined family of measures.

Identify Reoccurring Problems for Management Review

REFER back to the *Sears* and *Love Complaining Customers* video clips.

EXPLAIN that part of resolving a problem, is taking responsibility for ensuring that repeated problems do not re-occur. Over time, you will begin to spot problems that re-occur consistently. If you identify recurring problems, you should communicate these to your Interface Specialist, Team Facilitator, or Team manager.

EXPLAIN that specialists may also use the Open Mail system to send memos on re-occurring problems to the Quality Lead Team.

TRANSITION to the final topic by explaining that participants will have the opportunity to demonstrate the knowledge gained through this course in the next lesson, "*Putting It All Together*".

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Customer Follow-Up Activities

Follow-Up as Tool to Exceed Customer Expectations

INTRODUCE topic by asking participants about customer service experiences that they had which exceeded their expectations. Ask participants for specific examples where their expectations had been exceeded.

DISCUSS what was it about the experience that so impressed them.

LEAD discussion to an acknowledgment that:

- exceeding expectations "looked like" going over and above the call of duty
- by exceeding expectations, the customer service provider created loyalty
- specialists told friends about episodes in which a customer service provider exceeded their expectations
- although one should strive to exceed expectations throughout a customer contact, it is usually the "something a little extra" that typically takes place towards the end of a contact that makes *the difference*

ASK participants what are ways that a CSS can exceed a customer's expectations?

LEAD conversation to follow-up.

STATE: Follow-up is part of the measurement on the customer survey card that the customer gets.

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Customer Follow-Up Activities, Continued

Follow-up Procedure

STATE: When a problem has not been completely resolved, a follow-up procedure should be put in place.

ASK participants what is meant by the statement *not completely resolved.*

LEAD discussion to:

- problem has been managed to another ***Bell*South** entity for resolution
- when the CSS feels that the customer is not 100% satisfied with the resolution to his/her problem
- a lead generation has resulted in an unsuccessful sale

EXPLAIN that follow up procedures can be customized to suit the individual but should include the following steps:

1. Create a filing system with a file folder for each day of the month (1 - 31).
2. Create a simple data form for you customers needing follow-up. One possibility is to use a lead generation form for all follow-ups, though you should somehow indicate to yourself which customers are lead generation follow-ups and which are general follow-ups.
3. Place data sheets in the appropriate marked day for future follow-up. Use the following guidelines for how many days into the future you should place data sheets.
    - Problems working on own, next day
    - Problems passed to another BellSouth entity, 2 days. Prior to contacting the customer, check the customer's account and/or call the entity (not the individual) that the call was passed to in order to confirm resolution.
    - Unsuccessfully closed lead generation forms, 2 and 4 weeks after form returned to you.
    - Dissatisfied customers whose problem was satisfactorily resolved, but remain unhappy, 3 - 4 days
4. At the beginning of each day review the contents of that day's folder. Advise team manager/team facilitator of any required off-key time necessary to complete outgoing follow-up commitments.

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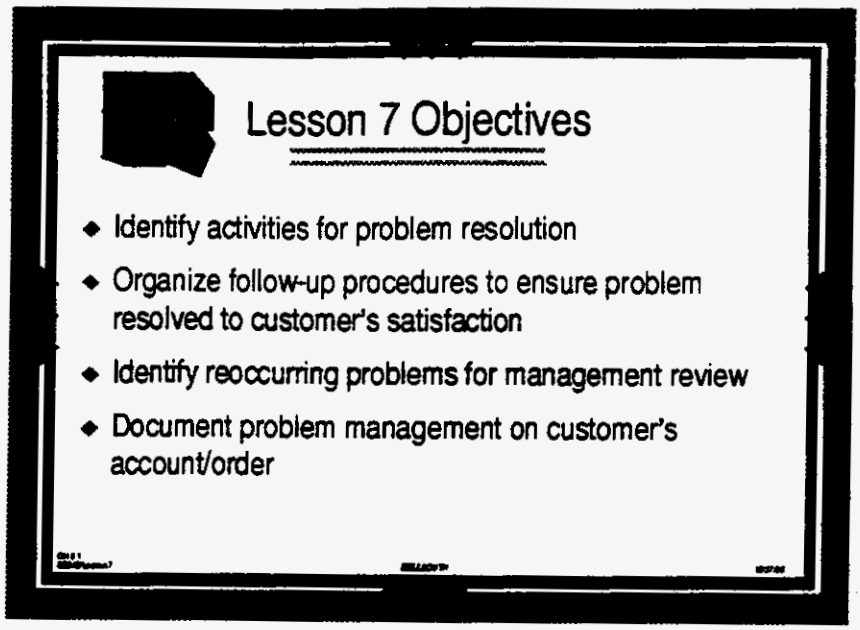
Problem Solving Methodology Resolution

Completing the Customer Interaction

Lesson Introduction

Begin this lesson by covering the objectives on the overhead.



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Completing the Customer Interaction, Continued

Document All Customer Interactions

STATE: We have now studied how to question a customer, understand their specific problem and take action to resolve their problem.

ASK: What is the last thing that a CSS must do in order to complete a customer service interaction?

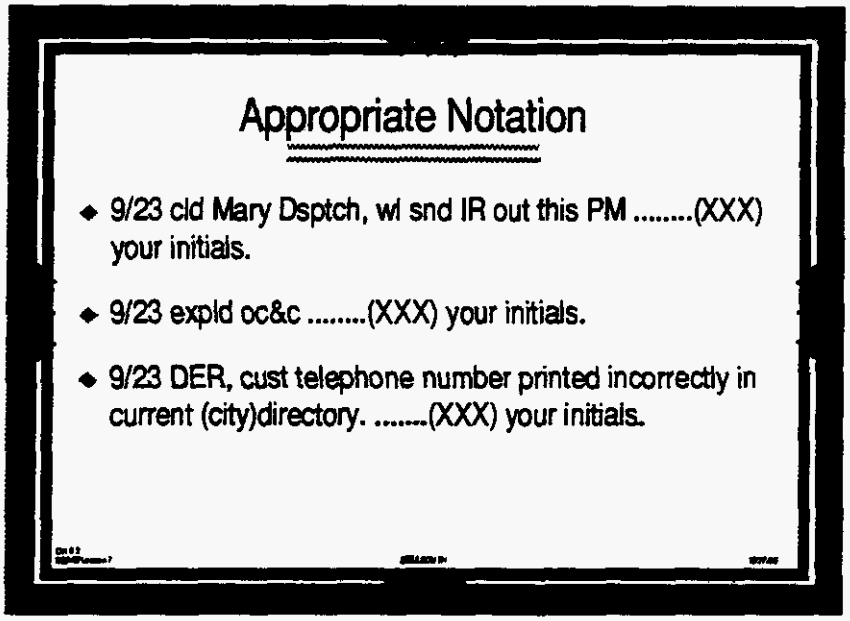
LEAD discussion to the fact that a customer interaction is not complete until their account has been properly noted.

ASK participants what do they think should be included in the notations to a customer record?

LEAD discussion to:

- date of contact
- subject of call
- any actions taken
- CSS's initials

INTRODUCE overhead as examples of appropriate notation.



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Lesson 7: Q.U.A.R. Methodology: Resolution

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Example #3

CSS LEAD FORM

■ Call Back Required
❑ On-Line Transferred

CSS Name: John Doe
CSS User ID: _____
Date: 10/3/95

Account #: (318) 686-1111 Call Customer By: 10/3/95
Customer Contact Name: Mary Kay Date: _____
Call Back Number: (318) 686-1111 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other CUSTOMER OPENING

SATELLITE OFFICE IN 3 MONTHS IN SHREVEPORT
NEEDS TO PLACE ORDER FOR NEW SERVICE

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Example #4

CSS LEAD FORM

❑ Call Back Required CSS Name: Jane Doe
■ On-Line Transferred CSS User ID: _____
Date: 3/13/95

Account #: (504) 467-0517 Call Customer By: _____

Customer
Contact Name: Larry Date: _____

Call Back
Number: _____ Time: _____

Possible Customer Needs

❑ FNA
■ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other NEEDS CALL FORWARDING

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Example #1

CSS LEAD FORM

■ Call Back Required
❑ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/8/95

Account #: (504) 822-7810 Call Customer By: 9/9 12:00

Customer Contact Name: Linda Date: _____

Call Back Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other TOO MANY BUSY SIGNALS

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Example #2

CSS LEAD FORM

❑ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/21/95

Account #: (504) 245-1241 Call Customer By: _____

Customer Contact Name: Liz Date: _____

Call Back Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
■ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other $200.00 COLLECT CALLS

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JOB-AID, Continued

List Of General Phrases/ Questions (continued)

5. *In looking at your long distance charges, I feel we can help you realize considerable savings on your calls. Let me have a Business Applications Specialist contact you to discuss the details.*

6. *I noticed you have a lot of calls on your bill and we may be able to lower or reduce your phone bill.*

7. *I know your calls are important to you. How helpful would it be if your calls could follow you anywhere?*

8. *I can order those directories for you. May I ask why you need them?*

9. *Do you have a fax/computer with a modem?*
   - *What happens if you need to use them and a customer is trying to reach you?*
   - *What percent of the day will be spent receiving or sending faxes?*
   - *How many faxes will you be sending/receiving per day?*

10. *Is there anything your phone service is not doing for you that you wish it were?*

11. *Based on what you have said about your service today, it seems you rely heavily on your phone service for revenues. I have a Business Applications Specialist who can help you get the most out of your service.*

12. *Looking at what you have now, what improvements would you want to make/consider making in your service?*

13. *How much would **one (1) missed call** affect your business?*

14. *Mr./Ms., how would you like to improve productivity by gaining access to more than one call at a time?*

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JOB-AID, Continued

List Of General Phrases/ Questions (Continued)

15. *How do you handle the calls when you are on the line?*
16. *What happens if one of your drivers on the road has a problem and is unable to get through because of a busy signal?*
17. *You mentioned you are expanding. How do you plan to handle those additional calls?*
18. *How often have your customers told you they have had trouble reaching you? Was the line busy when they called or were you unavailable?*
19. *I noticed this is a real estate/insurance office. How much of the day will your sales force be in the office?*
20. *When your customers reach a busy signal, how many will call your competitor?*
21. *Would you like to get an idea of how many of your calls you may be losing to your competitors?*
22. *Do your customers have a hard time getting through to you? Do you wonder how many calls you have missed?*
23. *Do you find your fax machine ties your line up for extended periods of time?*
24. *Do you find times when you answer the phone and the calls are for your partner (or another person) in your office?*
25. *How important is it that your clients be able to reach you without getting a busy signal?*
26. *You said you have several employees who often use the phone. With only one (1) number, I imagine it would be in use a lot, am I right?*

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What is a Sale?

Quoted Rates and Discloses

STATE: Despite the fact that sales are, in general, a BAS job responsibility, upon occasion, a Customer Support Specialist will gain acceptance to issue an order for new or additional services.

INDICATE that, if support quotes rates and discloses, this effectively completes the negotiation of an order. **In such a situation, a lead has not been generated, a sale has been consummated.**

EMPHASIZE that should the Customer Support Specialist gain acceptance from the customer to place the order, he/she MUST issue the order and follow full disclosure guidelines. In such instances a lead generation form should not be completed.

EXPLAIN that CSS appraisal criteria do not recognize individual sales, only leads, though a percentage of the CSS appraisal is based on overall gate revenue.

CONCLUDE lead generation is discovering a need and forwarding that need to a Business Applications Specialist. Small Business has decided the most effective way to handle sales leads are to pass them to a BAS for completion.

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JOB-AID

Review For Potential Needs

Customer Support Specialist should always review the following information on the customer records for clues to potential needs:

- **DIRECTORY ADVERTISING IN OTHER CITIES**
- **TOLLS TO SAME CITY**
- **SEVERAL LISTINGS/ ONE LINE**
- **TYPE OF BUSINESS, I.E., REAL ESTATE, PHYSICIAN, ETC.**
- **CUSTOMER DOES NOT SUBSCRIBE TO ANY FEATURES**
- **CHECK MEMOS**

How To Obtain Leads

Phrases to use to obtain a lead may differ with each situation, as well as, each specialist. It is very important to handle the customer's request ENTIRELY and satisfactorily before you attempt a lead generation phrase.

List Of General Phrases/ Questions

In addition to the support tool (flip chart) some additional examples are shown of general phrases and/or questions to use to identify a need and convert to a lead.

1. *You mentioned you were out of the office quite frequently. We may have some services we can offer to help you operate your business more efficiently. Let me have a Business Applications Specialist contact you.*

2. *I have heard you say during our conversation that your customers are important to you. What happens to your customers when your not available?*

3. *How many customers will have your home number?*

4. *You mentioned a concern about your competitors. We have some newer services that may prevent your customers from going to a competitor.*

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What is Not a Lead!, Continued

7. **Updating pending orders** at customer's request to add services.
   - Customer calls to change due date and also want to add services.

8. If the Customer Support Specialist **quotes rates and discloses**, this completes the negotiation of the order and is not a lead.

9. If customer calls and request service extended to another location, (DPA), this is a **misdirected** call.

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Passing a Lead to a BAS

Examples Of Positive Statements To Obtain Permission

EXPLAIN to participants that once they have determined that the best choice of action, (resulting in problem resolution) is through lead generation, they MUST obtain permission from the customer to either forward the call to a BAS or complete a lead generation form for future callback. This can be done in many different ways. In either instance, a lead generation form must be completed.

ILLUSTRATE various transitional phrases. A positive statement may work best. After presenting one example,

ASK participants to invent their own. Some examples are listed below:

- "I would like you to speak with one of our Business Applications Specialists to determine a solution."
- "I would like you to speak with a Business Applications Specialist."
- "I recommend you speak with a Business Applications Specialist to determine what would be best for you."
- "I recommend you speak with a Business Applications Specialist to analyze your situation and find the best solution."

Once Permission Is Gained Guidelines

EMPHASIZE that only after permission is gained, you may transfer, or if the customer prefers (or access requires), a call back/commitment may be established.

Should a commitment be made, offer commitment intervals:

* **If taken today by 11:00 a.m., call by 5:00 p.m. today**
* **After 11:00 a.m. today, call by 12:00 p.m. the next business day**

STATE: These are only guidelines, your office commitment guidelines may differ. Be aware of the customer's needs in that he/she may need more/less time for the call back.

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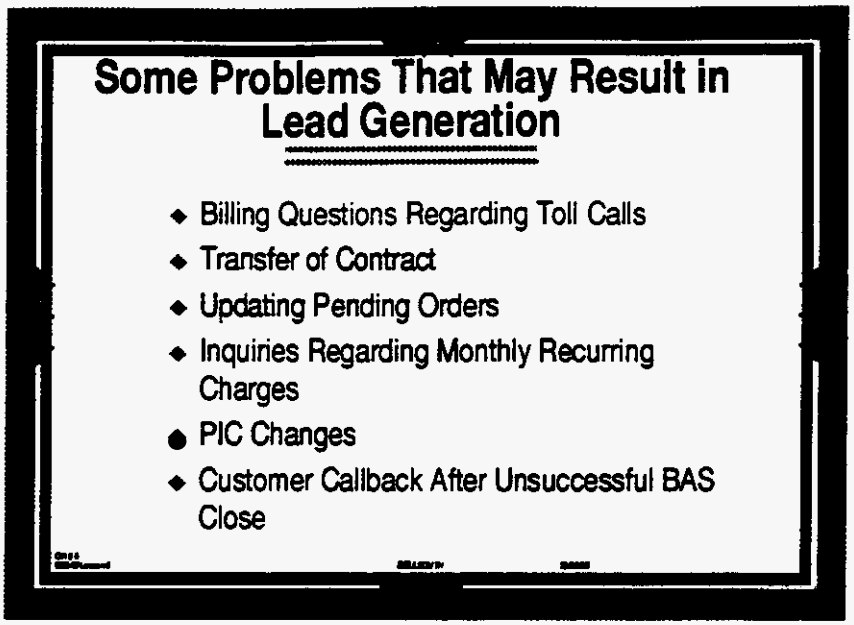
Types of Problems Managed Through Lead Generation

Common Problems Resolved Through Lead Generation

ASK: What type of problems are best resolved through a lead generation?

DISCUSS: The types of problems covered thus far in the course.

DEBRIEF the discussion by introducing the following overhead.



LEARNING ADVISOR NOTE: Use the examples on the following pages to illustrate examples of when the management of a customer call can result in the generation of a lead.

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What is Not a Lead!

Characteristic of What Does NOT Qualify as a Lead

LEAD conversation into a discussion of what is not a lead.

REFER to the earlier presented *bad lead generation form* examples as a point from which to launch the discussion.

VERIFY that participants have mentioned each of the following examples. If not, cover them yourself.

Examples of Not a Lead

1. Anytime the customer initiates a request to add, change or delete a specific service, it is not a lead.

   When in doubt, ask yourself:

   Did I initiate the customer's interest in discussion of services to resolve a communications problem or need?

2. **Removal of services**; transfer to the Business Application Specialists to attempt to save.

3. Orders taken by Customer Support Specialist **correcting customer records** (i.e., features in translation, but customer not being billed).

4. Orders to **separate billing.**

5. **Transfer of Contracts**
   - Should customer initiate discussion of additional services at the time of T of C, THIS IS NOT A LEAD.

6. **Intra Company** requests
   - Installer Order
   - BAPCO Order
   - Maintenance/ Repair Center calls to verify if feature is being billed

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The Lead Generation Process, Continued

3. UPDATING PENDING ORDER

When updating a pending order, if the customer asks for a service, this is not a lead. When updating an order and discovering a need, the Customer Support Specialist should on-line transfer or make a commitment for the Business Applications Specialist. This is a lead. A lead form should be sent.

4. MONTHLY RECURRING CHARGE

Leads are not determined solely by sales revenue. Services that carry a monthly recurring charge yet do not generate sales credit, such as a lead that results in an off premises extension or a trunk on a PBX, are considered leads.

5. CUSTOMER INITIATED CALLBACK

When a lead is closed unsuccessfully by a BAS, and the customer calls back to place the same order, it will become a successful lead. However, it is the Customer Support Specialist's responsibility to follow-up and refer to the designated tracker to receive credit. The CSS should keep a file of all unsuccessful leads and check them weekly for 4 weeks.

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The Lead Generation Process, Continued

Miscellaneous Information

EMPHASIZE that in order to ensure that participants receive credit for leads they have generated they should take 2 actions:

1. Complete a lead generation form
2. In ALL Instances, the Customer Support Specialist should note the account of a lead referral.

EMPHASIZE that when attempting to transfer to a BAS in order to complete the sale and all BAS lines are busy and the customer insists on completing the transaction;

- CSS completes the sale and issues order
- CSS does not complete a lead generation form
- CSS does not receive credit for lead, but office does receive credit for sale

LEARNING ADVISOR'S NOTE: In addition, the Business Applications Specialist should note the status of ALL pending/closed lead generations.

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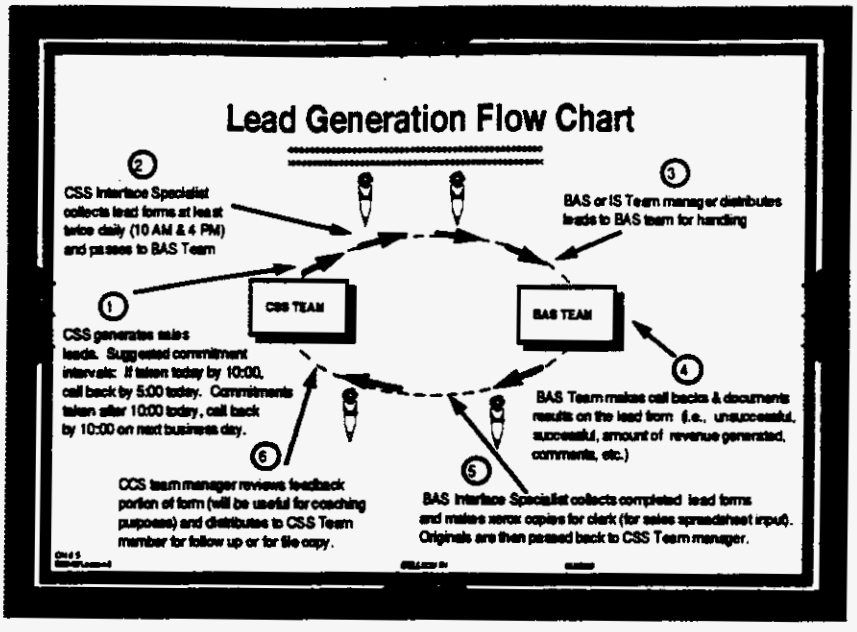
The Lead Generation Process, Continued

Lead Generation Process Flow

DESCRIBE the process that a lead generation sheet goes through using the accompanying slide.



INFORM participants that this process can differ from state to state.

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The Lead Generation Process, Continued

Examples of Problem Types Managed Through Sales Lead Process

1. **BILLING QUESTIONS**

Customer calls in about toll calls. Customer Support Specialist answers customer's questions and realizes customer may be able to use some of our services.

> *"Mr. Customer, in looking at your calling patterns, I believe we have some services that could possibly help you save money on your toll calls. I recommend a Business Applications Specialist speak with you."*

The Customer Support Specialist completes a LEAD GENERATION FORM and under the SUPPORTING COMMENTS portion states:

> **SUPPORTING COMMENTS:**
> - Customer has $50.00 of tolls to XYZ city and is interested in services that would save him money.

2. **TRANSFER OF CONTRACT**

Customer calls requesting telephone number in his name, but does not request any additional services. Talk to the customer about his needs as a new customer.

NOTE: Something is changing since the owners will change and new people are responsible. Ask questions such as:

- "Mr. Customer, How will you be using the service when it is in your name?'
- "Mr. Customer, Now that you are the new owner, what changes would you like to see in your service?"
- "Now that you have had the service for a while, what changes need to be made?"

> One a need is discovered on the T of C, you must determine at what point to prepare the lead generation form. Remember, the T of C should be finalized before the new owner may make changes to his/her services.

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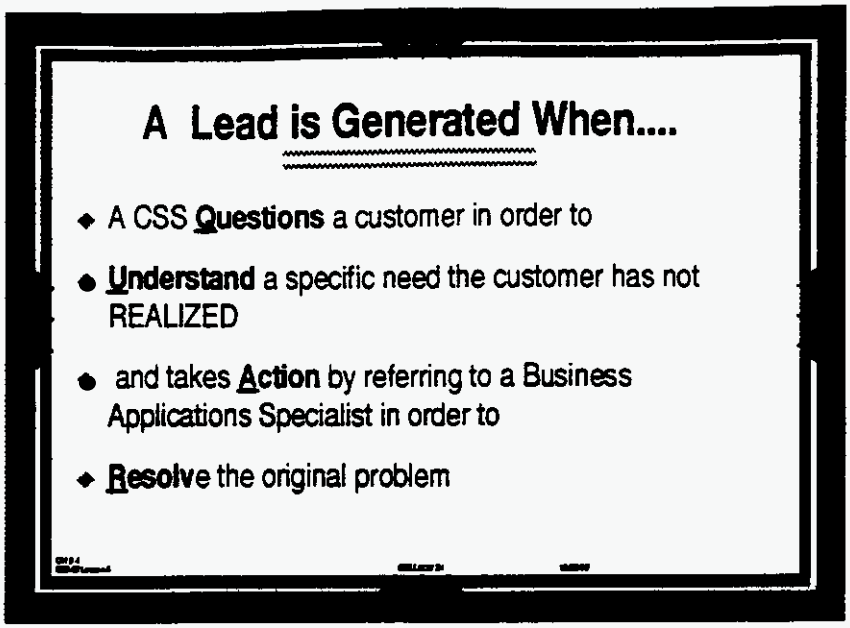
What is a Lead?, Continued

INTRODUCE overhead



EXPLAIN that lead generation is one form of successfully using the Q.U.A.R. process. It is very important to follow all the methodology's steps before attempting to resolve the customer's problem via the lead generation process.

Only after rapport has been established, and the customer's problem is fully understood is the customer apt to listen to our recommendations.

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The Lead Generation Process

How Leads Are Recorded

DESCRIBE the process of receiving credit for lead generation.

EMPHASIZE that a specialist will receive one (1) lead referral credit, per customer, for **successful** sales. Remember leads that do not result in a sale on the part of a BAS do not count as leads for the CSS.

EXAMPLE:

If the CSS speaks with one (1) customer and the needs identified may apply to five (5) Customer Service Records, the specialist will receive one (1) credit.

Lead Generation Sheet

EXPLAIN the proper completion of a lead generation form.

INTRODUCE example #1 (phone # 245-1241) on overhead projector by stating that it is a good example of how to compete a form.

LEAD discussion to:

- Manner in which information is filled out
- Level of detail of information/comments
- This is a good example of a lead generation form because it is not product specific

INTRODUCE examples #2 - #4

ASK participants if each is a good or bad example of a lead sheet.

LEAD discussion to:

- Example #2, (Phone # 686-1111) Bad example - customer would have ordered the service regardless
- Example #3, (Phone # 467-0517) Bad example - CSS "boxed in" BAS to offer call forwarding when other services may be more suitable
- Example #4, (Phone # 822-7810) Good example - Possible MemoryCall, add line, Call Waiting, Hunting

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What is a Lead?

Definition of Lead Generation

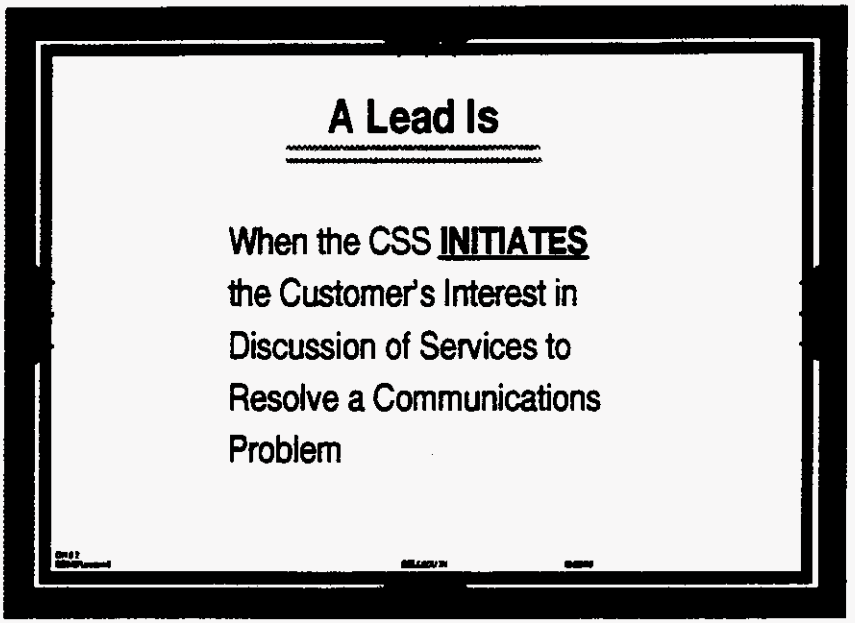
ASK participants for the definition of a lead?

LEAD the conversation to:

- A lead can solve a customer's problem
- A lead can be generated for a service or product unrelated to the original problem but uncovered during the process of problem management

EXPLAIN that, while the focus of this lesson is on generating a lead to resolve a problem, part of the CSS job responsibilities is to always be listening for an unrealized need. Remind participant's that a significant portion of the performance appraisal is based upon lead generation.

INTRODUCE slide and instruct participants to repeat text on slide in unison.



Lead Generation effects loyalty

ASK: What impact does lead generation have on promoting loyalty?

LEAD discussion to:

- Questioning uncovers unrealized needs, which create value for SBC

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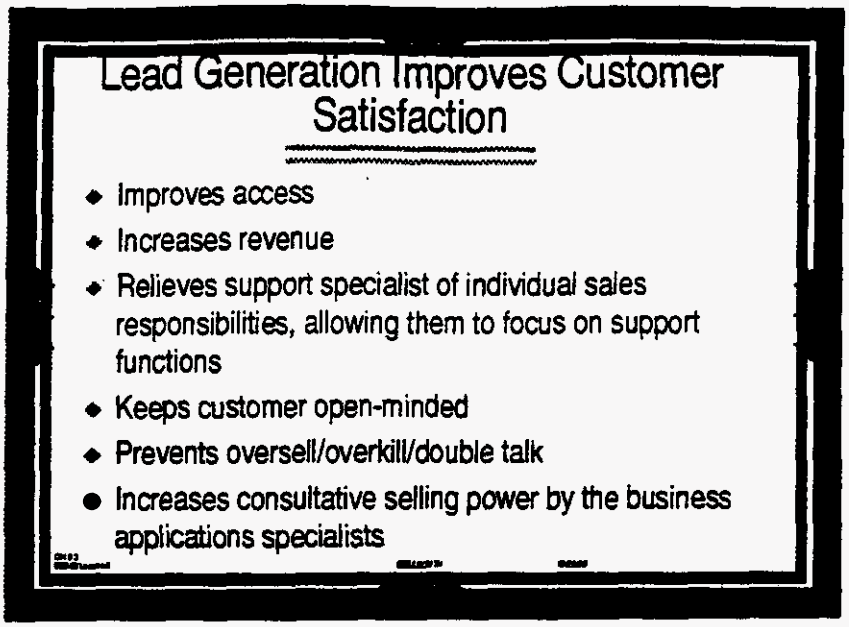
What is a Lead?, Continued



ASK: Is lead generation a form of problem management or problem resolution?

EXPECT: Problem Management, because you are passing it to another for final resolution.

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Taking Action - Lead Generation

Overview

Purpose

Improve customer satisfaction and create loyalty by developing guidelines for creating a lead versus finalizing a sale.

Objective

To obtain leads, the Customer Support Specialist identifies customer telephone **NEEDS** through general phrases and open-ended questions without intentionally targeting or naming a product.

ADVANTAGES:

- Improves customer satisfaction
- Improves access
- Increases revenue
- Relieves support specialist of individual sales responsibilities, allowing them to focus on support functions
- Keeps customer open-minded
- Prevents oversell/ overkill/ double talk
- Increases consultative selling power by the business applications specialists

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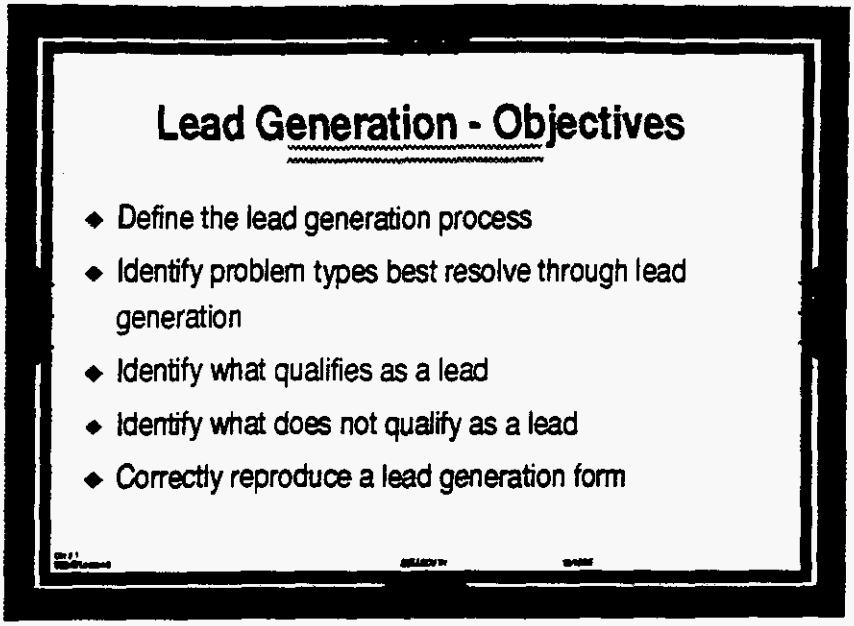
Overview, Continued

Lesson Introduction

Begin this lesson by covering the objectives on the overhead.



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Lesson 6: Q.U.A.R. Methodology: Taking Action - Lead Generation

Learning Advisor Guide

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Task Process: Billing Explanations

Billing Explanation

STATE: It is common customer problem to misread or misunderstand a bill that contains a partial month billing. We will learn about the details of a bill in another course. Our goal as far as problem management is concerned is to help you identify the common steps needed to pinpoint the customer's confusion and/or questions regarding their bill.

Step	Action
1	Question customer to determine nature of problem. Questions should aid you in determining their level of billing knowledge.
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine account to determine the: • billing date • the order number • date order completed
5	Explain to customer that the number of days of partial billing and also a full month in advance creates a partial prorated bill."
6	Acknowledge customer for their business and ask if there is anything else that you can help customer with
7	Note customer's account that you provided an explanation of OC&C on *X* date

EXPLAIN that the customer may want you to breakdown each item and give a complete explanation of each.

i.e., "*Remote Access Call Forwarded was added to your service on the 15th of the month. Your billing date is the 28th of each month. Therefore you have been billed a partial month from the 15th through the 27th and a full month for the 28th billing date*".

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Lesson Summary

Lesson Summary

REVIEW lesson by asking participants,

1. "How many of the problems presented in this lesson are "owned" by the CSS?

   LEAD discussion to:

   ALL

2. "Which of the problems presented in this lesson are examples of *problem management*?"

   LEAD discussion to:

   Misprinted directory = problem management

3. "Which of the problems presented in this lesson are of examples of *problem solving*?"

   LEAD discussion to:

   Missed appointment = problem solving with internal partner
   Billing explanation = problem solving (self)

TRANSITION to next lesson by
STATING: We have examined how to;

- question our customers
- to understand their problem
- to take action

Our job is **not** complete until we are assured that the problem has been resolved and we have obtained a statement of satisfaction from the customer. In the next lesson we will discuss the completion of the QUAR process, *Resolution.*

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Task Process: Directory Error Resolution

Directory Advertising

If your customer states that there is an error in the directory and information is being given incorrectly you must:

Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine the directory to verify and locate error

EXPLAIN that there could be times when the customer is looking at an out of date issue of the directory and you may find that there is no error in the current directory.

ASK: If there is an error, what is the next step?

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Task Process: Directory Error Resolution, Continued

Step	Action
5	Refer the error to BAPCO for resolution
6	Complete a mechanized *Directory Error Form* for South Central Bell area or on-line transfer the customer to a BAPCO representative in Southern Bell area.
7	If you on-line transfer your customer, ask permission to do so.
8	Provide the supporting information to the BAPCO representative. • Give customer's name • telephone number • internally targeted repetition of problem statement; *I have reviewed the Mobile, AL call guide pages. I have dialed the number listed and the number is listed incorrectly. All individuals referencing the call guide when attempting to reach the fire department will instead reach Joe's Pizza.*
9	Provide customer the name of the BAPCO representative that will be resolving the problem.
10	Acknowledge customer for their business and ask if there is anything else that you can help customer with prior to passing them on to BAPCO representative
11	Note customer's account that you have determined that wrong number was printed on *X* date.
12	Follow up with customer to ensure that problem has been resolved to their satisfaction

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Task Process: Pending Orders - Changing Due Date

Pending Orders: Changes

STATE: We have just looked at one type of pending order problem, what is the other type of pending order you will most often encounter?

LEAD discussion to:

Changes in pending orders

REVIEW the categories of changes with participants.

LEAD discussion to:

- earlier due date
- later due date
- additional service
- remove some aspect of service from pending order
- payment of deposit

EXPLAIN that we will now walk through the process of changing a customer to an earlier due date using the process flow diagram as a road-map.

LEARNING ADVISOR NOTE: Ask 2 participants to lead class through use of role-playing the questioning and understanding phases of QUAR up through the development of a good problem statement. As background, explain that customer had previously ordered new service promised for connection 2 weeks from today's date.

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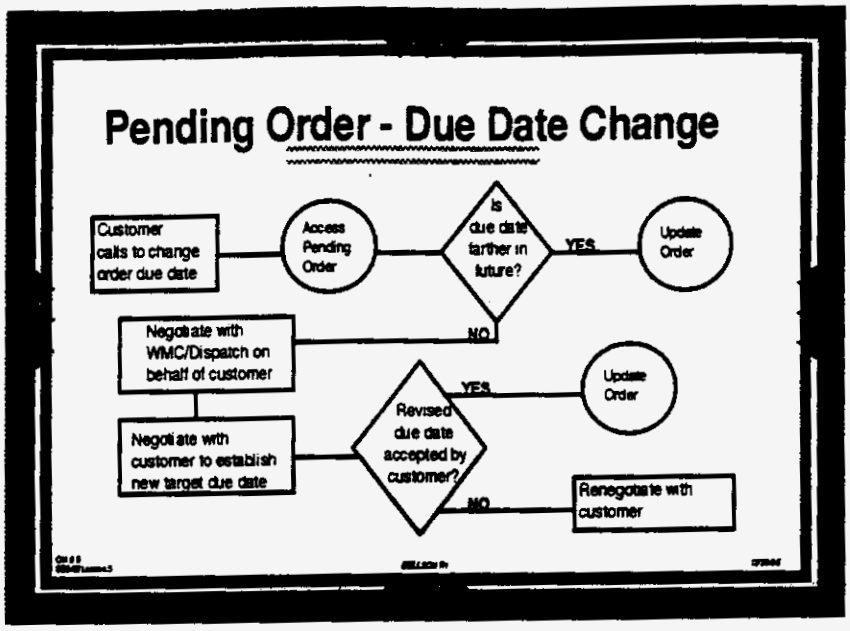
Task Process: Pending Orders - Changing Due Date, Continued



Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine customer order to determine due date and complexity of order.
5	Determine what resolution will satisfy the customer, will exceed their expectations
6	Make determination of feasibility of committing to earlier completion of work based on order complexity and current time of day.
7	Negotiate with dispatch to obtain commitment
8	Obtain statement of satisfaction from customer confirming new due date
9	Update order
10	Acknowledge customer for their business and ask if there is anything else that you can help customer with

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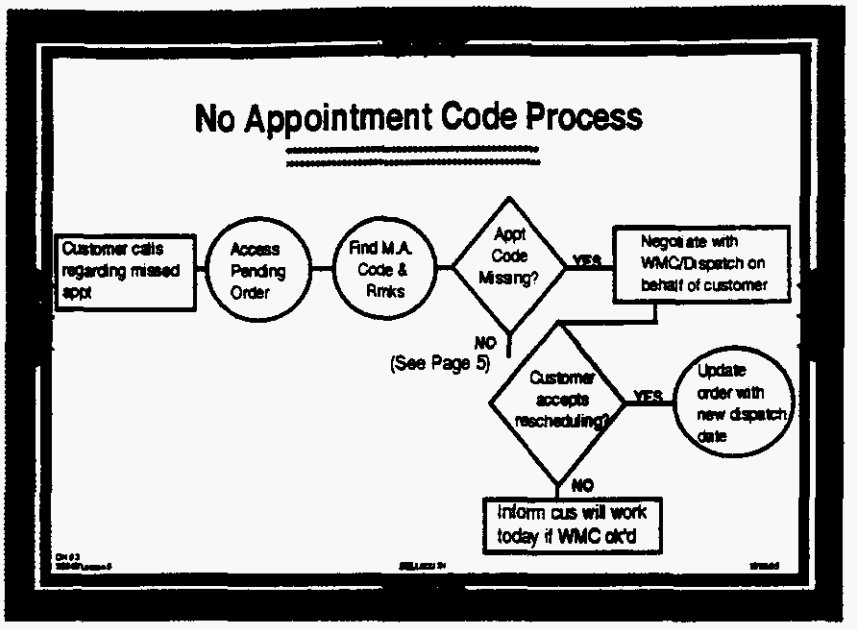
Pending Order Resolution - Missed Appointment, Continued

If no Appointment code.....

EXPLAIN the following process flow as an example of another alternative process that can occur when a customer calls regarding a missed appointment.



Completed Order; Service not Working

ASK: What problem type is the next "logical" type of problem a CSS may encounter concerning pending orders that <u>have</u> been worked?

LEAD conversation to:

> Completed orders where customer calls complaining that service is not yet working.

ASK participants to decide if this sounds as if it is a problem management of problem solving type of order, and why?

LEAD discussion to:

- problem solve, with help of RCMAC
- pass of to an interface specialist if delayed access to RCMAC

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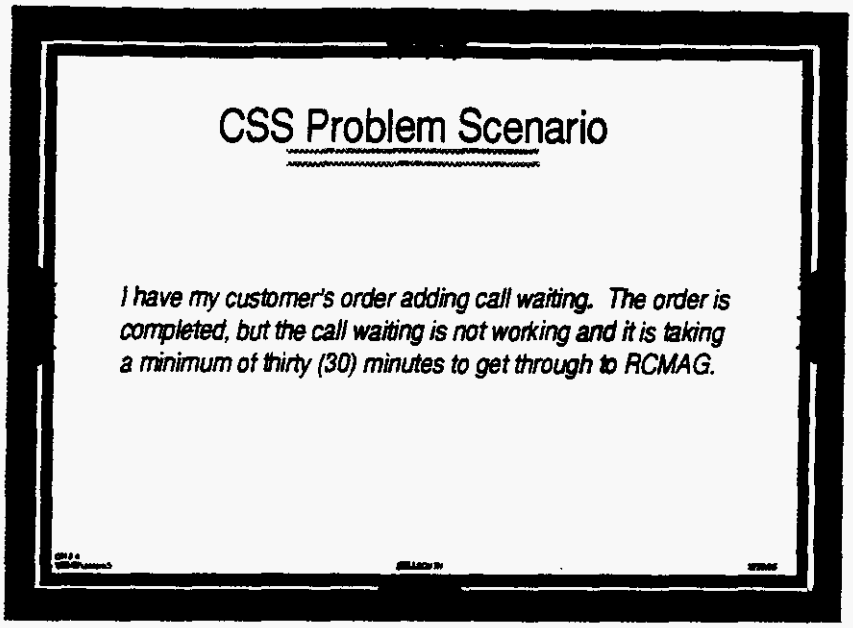
Pending Order Resolution - Missed Appointment, Continued

EXPLAIN that you will provide an internally focused statement given by an actual CSS.

ASK the participants to list the actions that this CSS would likely take to resolve the following:



LEAD discussion to a follow-through of the steps/actions appearing below

Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem
4	Examine customer order to determine due date and for confirmation that the code for call waiting, *(ESX)* appears in the service and equipment field, *(S&E).*
5	Partner with RCMAC or repair to determine the problem while customer is on hold
6	If resolution time would cause an excessive amount of time on hold for the customer, pass call to interface specialist

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Pending Order Resolution - Missed Appointment, Continued

Example of Good Internally Targeted Problem Statement

ASK: What type of information would you add to a re-stating of the problem to Engineering?

LEAD discussion to:

Repeat the problem statement that has been developed and agreed upon by CSS and customer and provide the additional information obtained through researching the pending order using the system. The additional information required internally consists of:

- order number
- telephone number
- appointment code
- any remarks

"I have an order for new service for connection by 5:00 today and the order is CF'd.
The order number is 12345-abd the telephone number is 555-1212.
There is no missed appointment code on the order.
Can you tell me what the estimated completion date on this is?"

Step	Action
6	Obtain answers from Engineering on: 1. Clarification on why first appointment was missed 2. Estimated date when facilities would be available to complete order.

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Pending Order Resolution - Missed Appointment, Continued

CSS as Internal Customer

REFER to the earlier discussion of external and internal customers presented in lesson 1.

ASK participants who is the customer in this interaction?

LEAD conversation to the fact that the CSS is an internal customer to dispatch and dispatch should attempt to satisfy the CSS's needs.

ASK participants what are the CSS's needs?

LEAD discussion to solving the customer's problem by exceeding the customer's expectations.

EXPLAIN that a good method of exceeding the customer's expectations is to negotiate with dispatch to assign someone to work overtime in order to complete the order on the original date promised. Think of yourself as a customer and your negotiation efforts are you way of demanding excellent customer service.

Step	Action
7	Negotiate with Engineering to complete order or negotiate for another due date that Engineering has confidence in their ability to keep.
8	Provide your customer with a complete explanation of why another due date is necessary
9	Obtain statement of satisfaction from customer confirming new due date
10	Acknowledge customer for their business and ask if there is anything else that you can help customer with
11	Follow up the order on due date to ensure that it is being worked as promised.

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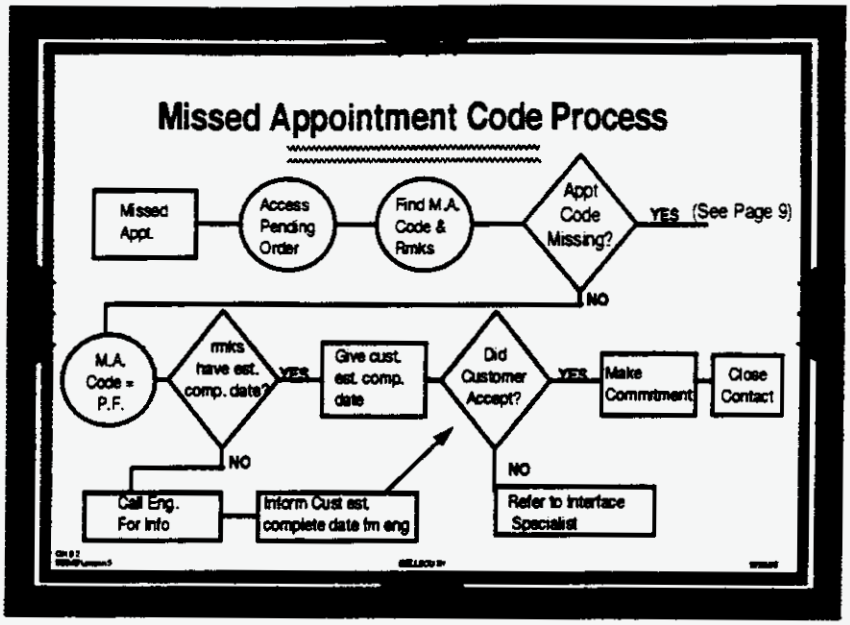
Pending Order Resolution - Missed Appointment, Continued

LEARNING ADVISOR NOTE: Introduce overhead of Missed Appointment code Process. Lead participants through the resolution process using below questions to prompt responses. Ask participants to recall the meaning of the 3 symbol types.



Step	Action
4	Look at the pending order to determine the due date and the reason given for not working the order. (Missing Appointment Code)

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Pending Order Resolution - Missed Appointment, Continued

ASK: Can someone tell me the three reasons, their definitions and their associated codes that explain why an appointment was missed?

LEAD conversation to:

1. **Subscriber Access (SA)** When the subscriber is not at location at the time the order is scheduled to be worked.

2. **Company Load (CL)** When we cannot work the customer's order because we have over-scheduled the technician's workload.

3. **Plant/Facility (PF)** When orders can not be worked due to cabling problems or lack of necessary wiring pairs to initiate service.

EXPLAIN that the explanation of the missed appointment appears in the remarks section of the pending order.

ASK participants to use their job aid from Lesson 2 to determine the next step.

LEAD discussion to:

Step	Action
5	Repeat problem statement. Add any additional comments necessary for internal clarification.

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Introduction, Continued

Major Categories

ASK: In a previous lesson, we identified the major categories of customer problems. What are they?

LEAD conversation to:

1. Pending Orders
2. Directory Advertising Error
3. Billing Explanations

STATE: Let's look at the various actions or procedures that we recommended you follow to resolve each general category of customer problem.

REFER to the customer focused problem statement of lesson 4. Inform participants that it will be used as a point from which to take action in resolving a problem.

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Pending Order Resolution - Missed Appointment

Pending Orders

STATE: Within the problem category of pending orders, there are general problems that customer's will call about.

ASK: Does anyone recall the types of pending order problems?

LEAD conversation to:

1. Missed Appointments
2. Changes to a pending order
3. Feature/Service not working

LEARNING ADVISOR NOTE: Prior to going into an explanation of the various process flows, instruct participants to examine their training aid from lesson #2.

Pending Orders: Missed Appointments

EXPLAIN that if a customer states that their order for service hasn't been completed, then you must perform the tasks necessary to determine why the order has not been worked.

LEARNING ADVISOR NOTE: Ask 2 participants to lead class through use of role-playing the questioning and understanding phases of QUAR up through the development of a good problem statement. As background, explain that customer had previously ordered new service promised for connection today.

Step	Action
1	Question customer to determine nature of problem
2	Construct a concise problem statement
3	Obtain agreement from customer on your re-statement of problem

FACILITATE role-play in arriving at the following as an example of a good problem statement.

"Mrs. Smith, you ordered service for connection by 5:00 today and the service is not operational, is that correct?

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Taking Action

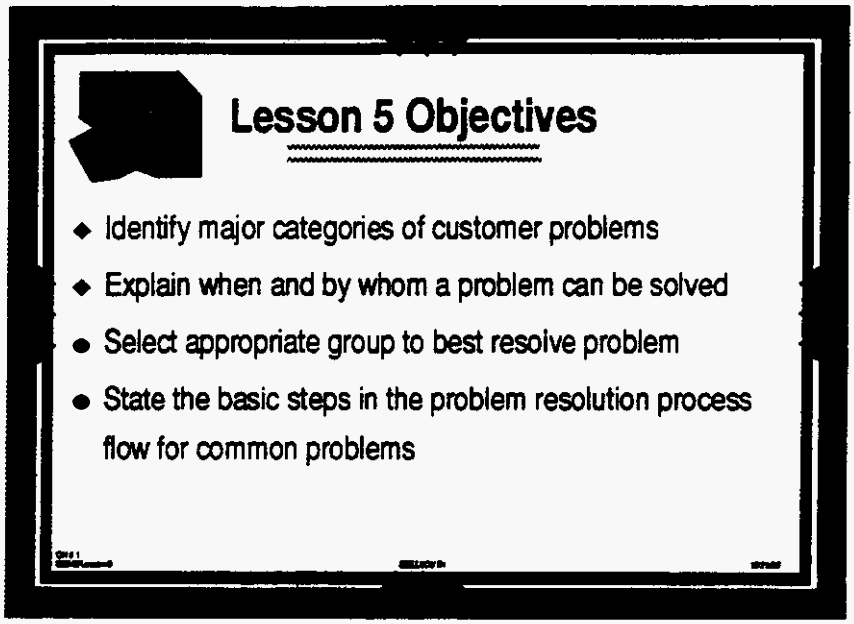
Introduction

Overview

In this lesson participants will learn the specific actions/processes they should undertake toward resolving major categories of customer problems.

Objectives

At the conclusion of the lesson, participants will be able to:



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Introduction, Continued

Introduction

Our customers are our most important commodity. Without them ,our company would cease to exist as you know it today. BellSouth would like to be the vendor of choice for our customers. In order to do this, once we understand the nature of a problem and can repeat the problem to the customer through a concise problem statement, we must proactively take action to resolve the problem as quickly as possible.

Plan of Action

STATE: Once you fully understand what the customer's problem is, it is time to make a series of decisions.

ASK: What are the three decisions to be made?

LEAD discussion to:

1. Solve problem on own
2. Solve problem by partnering with another
3. Manage problem by passing it off to another for resolution

EXPLAIN that there are some standard procedures to follow under each of these scenarios. This lesson will provide you with a framework on the actions to take in each case.

Ownership

STATE: In all three scenarios, you are the owner of the problem until the customer is satisfied and we have exceeded their expectations. Following up on a problem that has been passed is one way to exceed a customer's expectations.

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Lesson 5: Q.U.A.R. Methodology: Taking Action

Learning Advisor Guide

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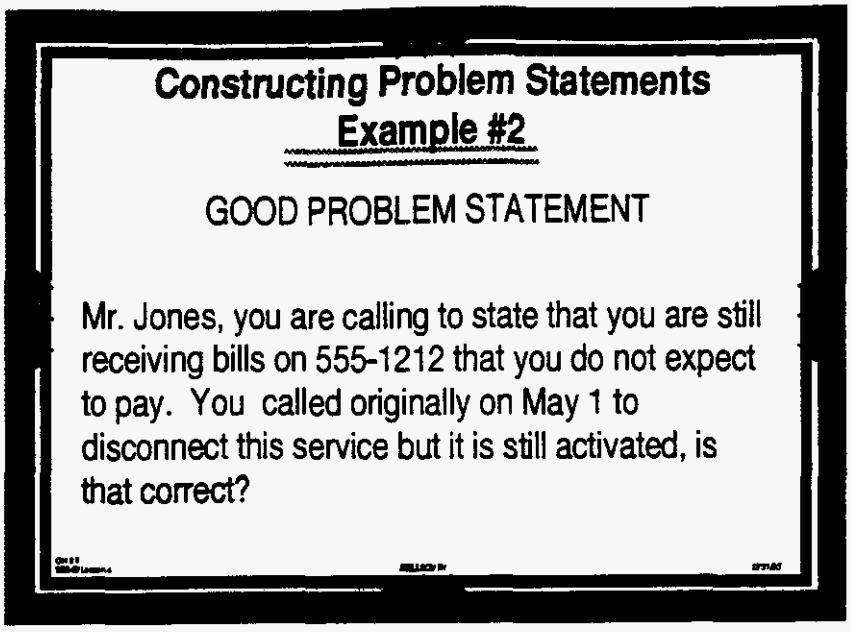
Problem Statements, Continued

Solution Example #2



Problem Statement as a Tool to Exceed Customer Expectations

Identification of Actions That Will Exceed Customer Expectations

EXPLAIN that once a customer's problem has been clearly defined through a good problem statement, the CSS should attempt to discover what actions can be taken to exceed the customer's expected resolution to the problem.

ILLUSTRATE this point by returning to the Mobile fire department example.

ASK participants to make suggestions as to what actions they think will exceed the customer's expectations in this case.

LEAD conversation to:

- a commitment to correct the error in directory assistance
- a commitment to submit error report to BAPCO

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Problem Statement as a Tool to Exceed Customer Expectations, continued

EXPLAIN that these actions may meet customer expectations but probably not exceed them. Committing to having the disconnected recording changed to one that references the fire department's number in addition to the original message. An additional effort to further exceed expectations would be to write a note acknowledging the customer's efforts to protect his community's citizens. Truly exceeding customer expectations would be establishing Remote Call Forwarding and waving all charges until the new directory is delivered.

REFER participants back to the two examples they developed problem statements for.

ASK what would exceed the customer's expectations in these cases?

TRANSITION to next lesson by explaining that thus far we have learned:

- How to approach and respond to customer inquiries
- What fact finding questions to ask in order to understand the nature of a problem
- How to repeat your understanding of a customer problem in a concise, unambiguous manner

EXPLAIN that the next topic will cover the actions to take in order resolve a customer problem and then exceed their expectations.

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Problem Statements, Continued

Activity

INTRODUCE activity by stating that we are going to practice role-playing the creation of good problem statements.

INSTRUCT participants to write a good problem statement in their handouts, based on the information they will see on the following overheads.

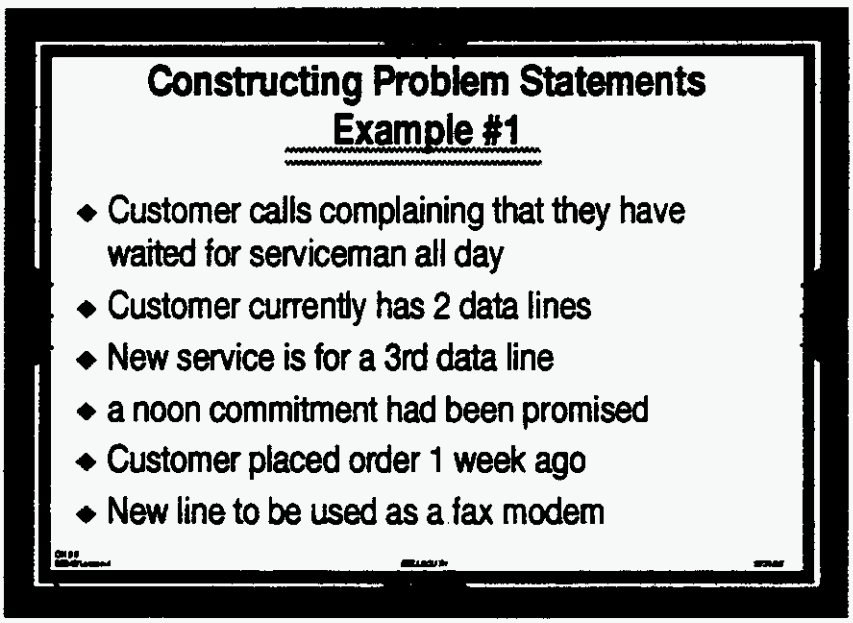
DEBRIEF each statement by asking one or more participants to read their statements. Board their statements and review with class to ensure that each has all the attributes of a good problem statement outlined in the *Problem Statement Attributes* overhead.

SHOW the solution to the first statement before moving to the second.

EXPLAIN why solution statement is an example of a good problem statement.

NOTE that each example contains extrantious information not necessary to be included in the problem statement. Understanding what information to include or not to include is one of the skills required to produce a concise statement.

Example #1



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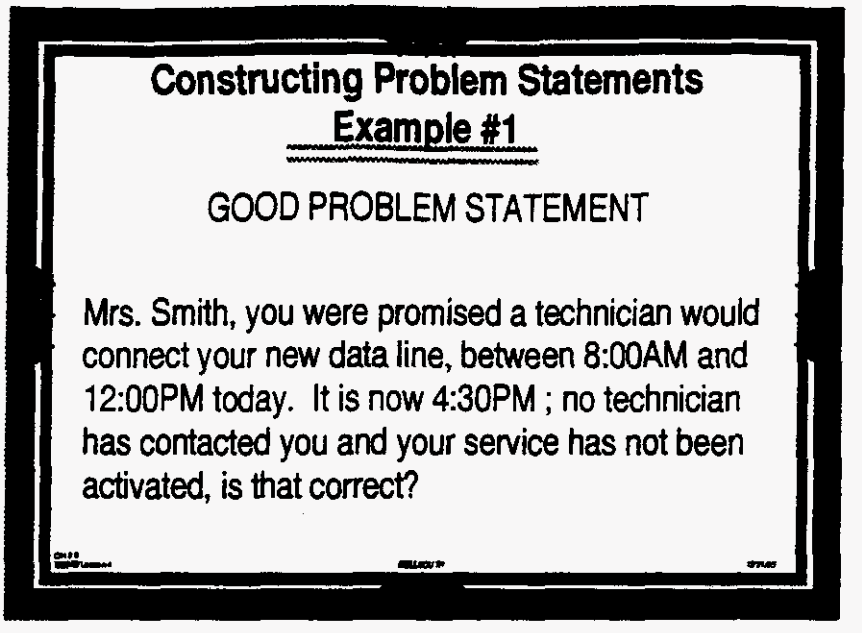
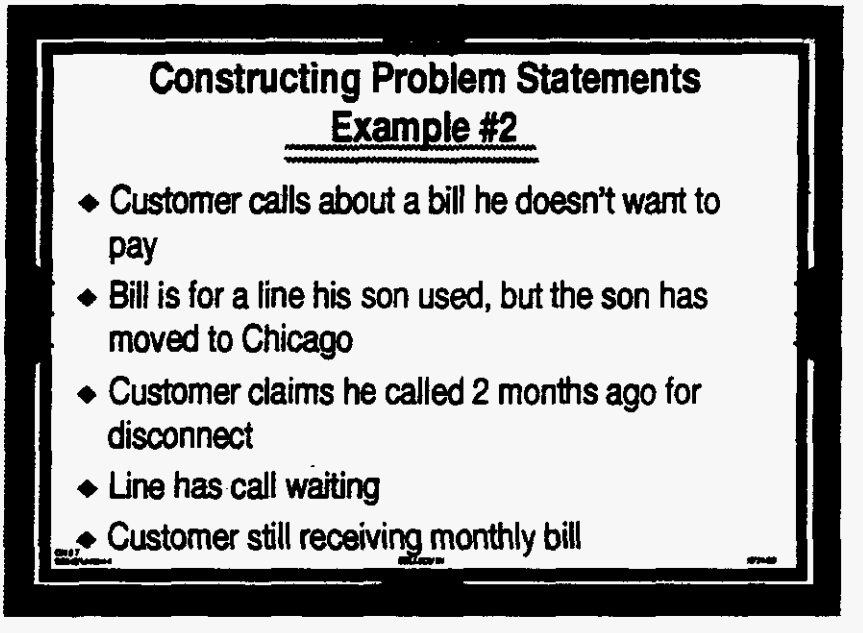
Problem Statements, Continued

Example #1 Solution



Example #2



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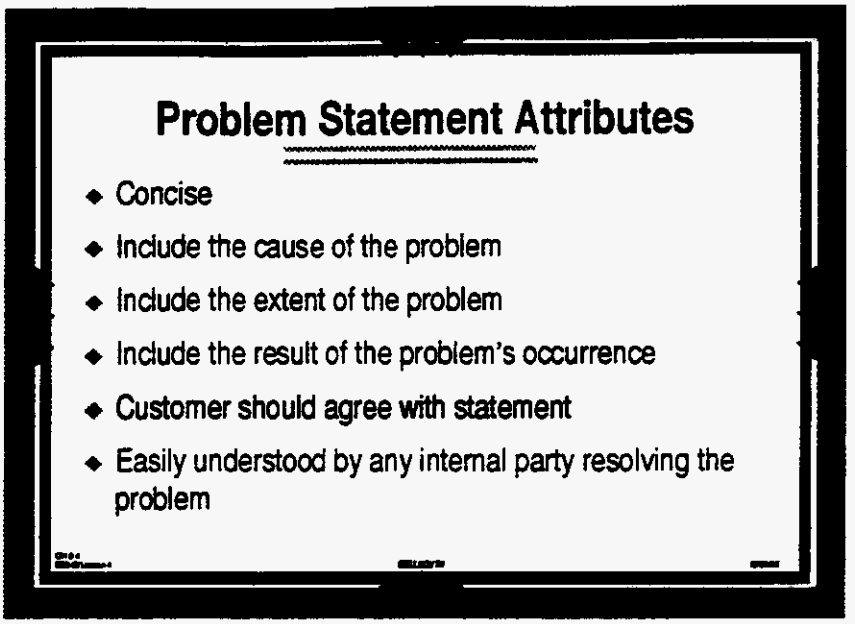
Problem Statements, Continued

Characteristics of a Good Problem Statement

STATE: Now that you have heard an example of a poor problem statement, let's explore how to construct a good problem statement.

ASK participants what is meant by or should be included in a "good problem statement"?

LEAD discussion to:



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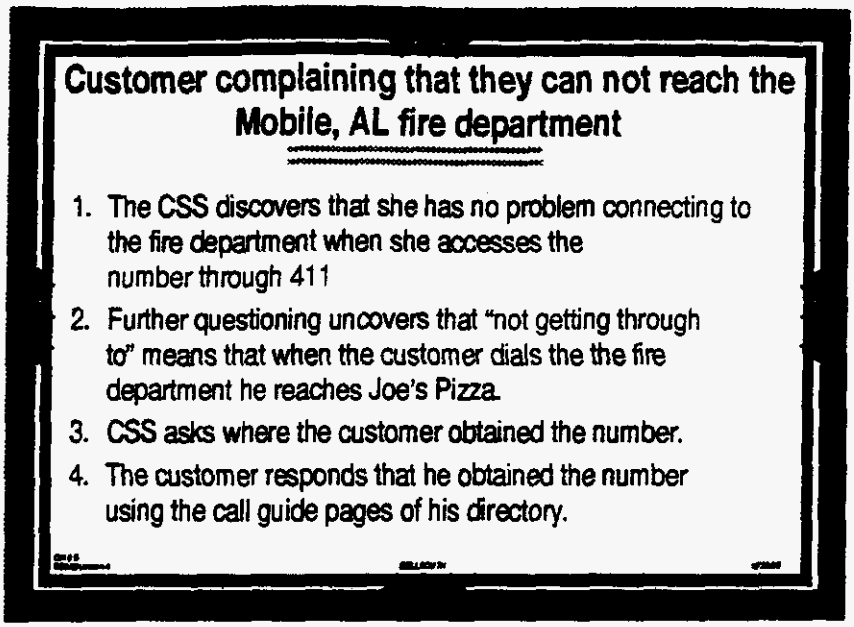
Problem Statements, Continued

Example of a Good Problem Statement

USE the following example to illustrate the creation of a concise problem statement consider the following situation:



Good Customer Focused Problem Statement: *When you use the Mobile, AL call guide page to reach the fire department you do not reach the fire department; instead you reach a recording stating the number has been changed to an unlisted number.*

STATE: There is little chance that this problem statement will be misinterpreted by any of the people who must resolve this critical problem, unlike the "telephone" game example demonstrated earlier.

The statement should be repeated to the customer to gain agreement on your shared perception of the problem.

EXPLAIN that in a future lesson, we build upon the customer focused problem statement to create an internally focused problem statement.

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Problem Statements

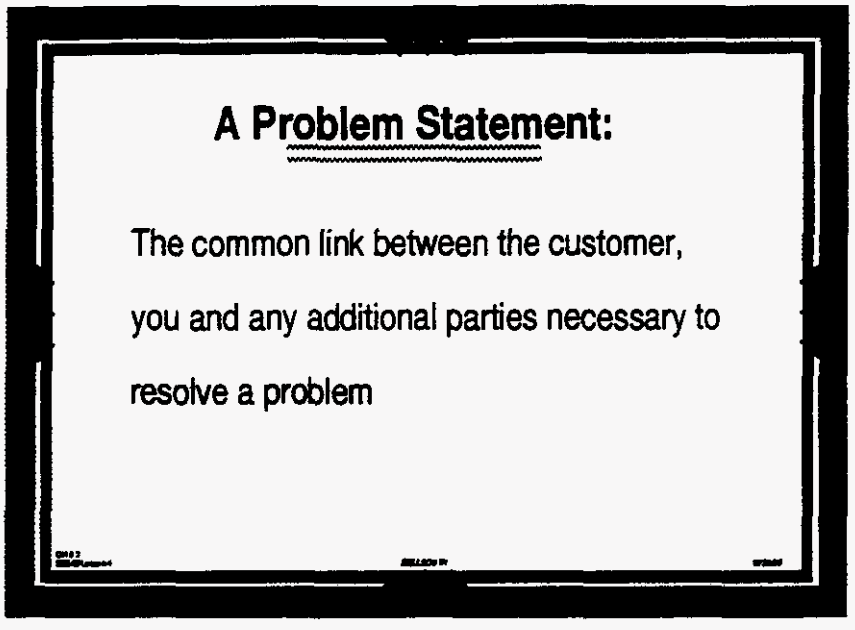
Problem Statement as Test of Understanding

DISCUSS that once a problem has been identified as being "owned" by *Bell*South, a deeper level of understanding of the problem must now be obtained as the next step toward resolution.

A "test" of a CSS's thorough understanding of a problem is the production of a good problem statement. Problems can be addressed far quicker when all concerned parties have a like understanding of the problem.

ASK: Who are the "concerned parties" I am talking about?

LEAD discussion to:



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Problem Statements, Continued

Importance of a Good Problem Statement Activity

DEMONSTRATE the importance of concise problem statements by playing a quick round of the childhood game of telephone. Whisper the following to a participant and then have them repeat it from one participant to another. Have the last participant repeat the statement to the class. After the last participant tells the class what he/she heard, read the statement to the class.

1. A customer calls complaining that they can not get through to the Mobile, AL fire department.
2. The CSS discovers that she has no problem when she attempts to connect to the fire department
3. Further questioning uncovers that "not getting through to" is not a failure to connect, but is due instead, to a recording that states that the number has been changed to a non-published number.
4. The CSS asks where the customer obtained the number.
5. The customer responds that he obtained the number using the call guide pages of his directory.

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Identify All Information Required to Determine Cause of Problem

Problem Categories Have Standard Data Gathering Requirements

INTRODUCE topic by explaining that attention will now be returned to those activities that ARE within the scope of the CSS job function.

EXPLAIN that the standard problem categories, of

- Pending Orders
- Billing Questions
- Directory Advertising Error

have a standard, predictable indicators for their cause. The quicker a CSS becomes familiar with the standard problem types, and their key indicators, the quicker a plan of action can be determined. This, in turn, will speed the time to problem resolution.

EXPLAIN that it is the CSS's responsibility to identify all the information necessary to understand the nature of a problem. Once you have this information, you must then;

- determine if the problem can be solved by your own action or
- problem must be passed to another party for resolution.

Understanding Potential Pending Order Problems

EXPLAIN that there are several categories of pending order problems that a CSS is likely to encounter, they are

- Ordered service/product not operational
- Service order information not complete
- Missed appointments

In order to understand the proper resolution, information to be gathered includes:

1. number calling about or business name
2. date of the service commitment
3. what product or service was ordered

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Identify All Information Required to Determine Cause of Problem, Continued

Billing Questions

EXPLAIN that the most common billing questions concern the inclusion of a partial month billing in addition to a full month of service. In order to understand the proper resolution, information to be gathered includes:

1. number calling about
2. billing month being inquired

Directory Errors

EXPLAIN that the vast majority of directory errors are dealt with directly by BAPCO. The CSS's task when receiving calls regarding directory calls is to verify that there truly is an error prior to passing the call to BAPCO (Southern) or completing a mechanized error report (South-Central). In order to understand the proper resolution, information to be gathered includes:

1. What is telephone number in question
2. What directory is in error, also white or yellow pages or both
3. What information is misprinted
4. What the proper information should be
5. Effect of misprint on customer's business

EMPHASIZE that it is important for the CSS to empathize with the customer prior to passing the call, or while completing the error directory report. . As a general rule, the CSS should not:

1. Assume any fault or liability for error
2. Make any financial commitment to customer

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Identify the True Need, Continued

Resolution Equals Statement of Customer Satisfaction (continued)

EMPHASIZE that in all customer interactions, it is important to maintain ownership of the problem until resolution. The customer should feel comfortable with the knowledge that you are willing to take whatever steps necessary to resolve the problem.

Opportunity to Exceed Expectations

ASK: Which type of problems provide the best opportunity to exceed customer expectations?

LEAD discussion to: "Both"

EXPLAIN that in the instance where it has been identified that the problem is not directly related to ***Bell*South**, the customer has low expectations of any further customer service activities on the part of the CSS.

ILLUSTRATE this concept by introducing the final video clip and explaining:

> ***"When expectations are low, it is easy to exceed expectations and create a moment of truly excellent customer service."***

LEARNING ADVISOR NOTE: Video clip of Phil Wexler of Audio-Visual Campus tells the story of asking for change of a dollar in order to make change for a telephone call. The possible outcomes of the request are described as follows:

1. Clerk refuses to make change for non-customers
2. Clerk makes change
3. Clerk allows person to make local call using store's phone

Outcome #3 does not cost store anything, and far exceeds customer's expectations. Chances are good that the individual will remember the store favorably when next in the market for that store's products or services. i.e., treat individuals as customers at all times! This is a great example of creating loyalty for a customer who is not expecting anything.

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Identify the True Need, Continued

ASK participants for ideas for ways in which they could exceed expectations of an individual who has contacted ***Bell***South in error.

EXPECT:

1. provide phone number of appropriate vendor as you have access to multitudes of directories
2. provide information on the true cause of problem
3. offer alternative solution through suggestion of a ***Bell***South product or service

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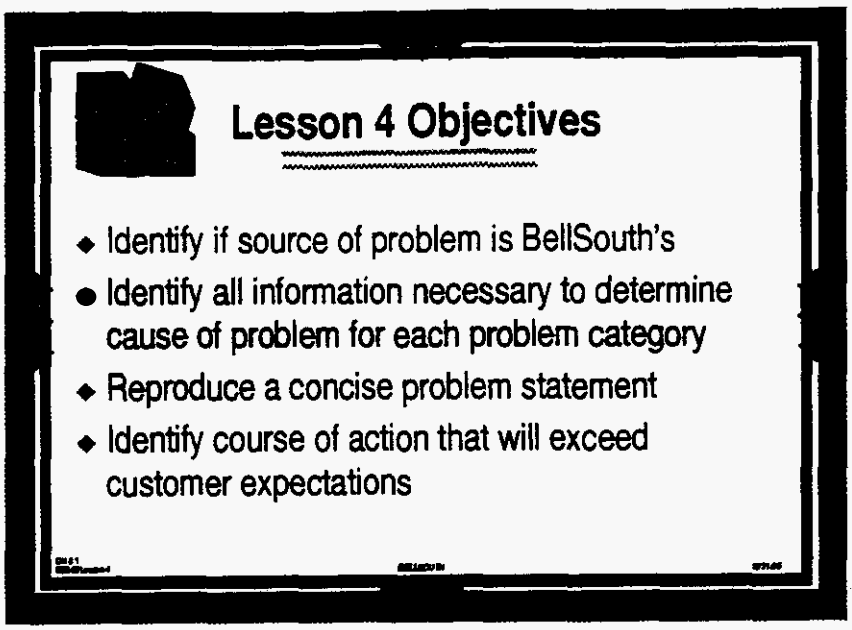
Understanding the Problem

Overview

Lesson Introduction

Begin this lesson by covering the objectives on the overhead.



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Identify the True Need

Nature of Problem

EXPLAIN that as a result of the questioning process, you should arrive at an understanding of the nature of a customer's problem.

ASK: What are two possible types of problems encountered by a CSS?

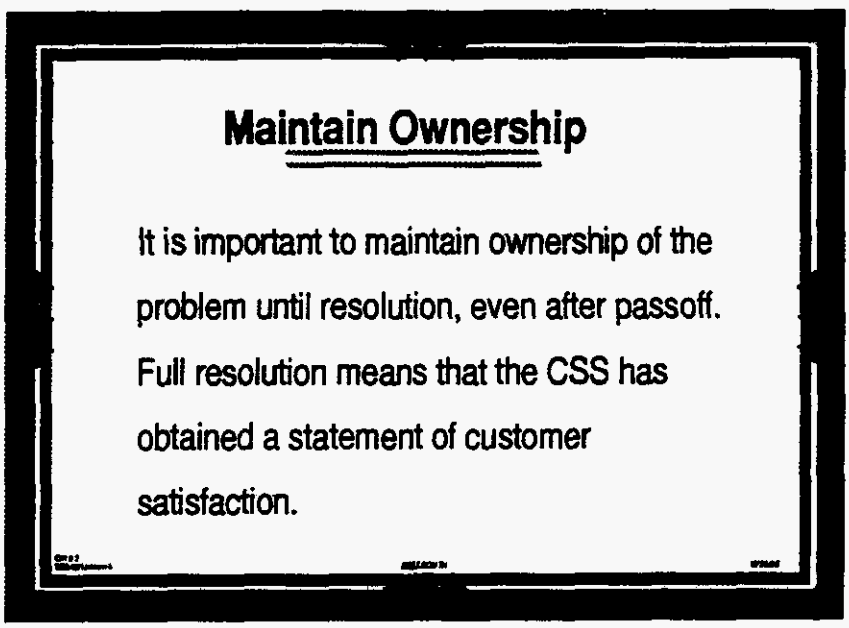
LEAD discussion to:

1. ***Bell***South related problems
2. Non-***Bell***South related problems

Resolution Equals Statement of Customer Satisfaction

STATE: After gathering the necessary information to decide whether the problem is "owned" by ***Bell*South**, the customer is either directed outside of ***Bell***South or we accept problem as being within ***Bell***South's jurisdiction to resolve.

INTRODUCE slide.



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Lesson 4: Q.U.A.R. Methodology: Understanding the Problem

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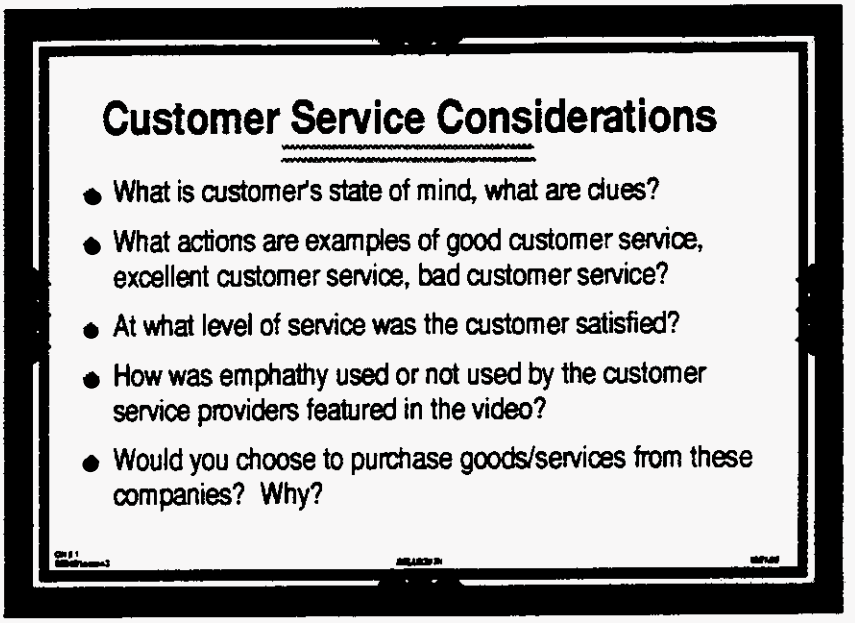
Customer Service, "What's Your Gripe?", Continued

LEARNING ADVISOR NOTE: Review all the video shown to date using the following overhead as a starting point for further discussion. At your discretion, replay the *48 Hours* video segments in order to review the subject matter covered thusfar. Aid participants in identifying the customer's current state of mind, the service providers' reaction(s) to the customer. Most participants will pick up much more from the video clips upon a second viewing.



SHOW the *48 Hours* video at this time.

After completion of video;

LEAD a discussion of the video clip. Address the questions above.

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Rapport = Understanding

TRANSITION to the next topic by explaining that the by-product of establishing rapport is that you are able to understand a customer's problem.

STATE: The next topic will instruct you how to demonstrate both to your customer and to other entities within BellSouth that you understand the problem. Understanding the problem is the first step toward resolving the problem.

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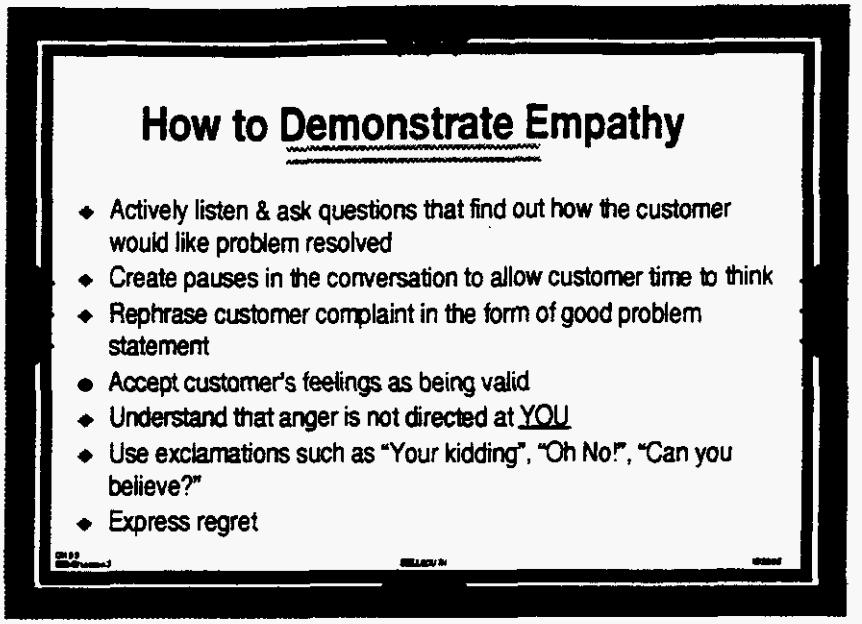
Responding to Each State of Mind, Continued

LEAD discussion to:



RETURN to the lists of customer service interactions from the last activity. Examine each use of empathy for characteristics appearing on the "*How to Demonstrate Empathy*" overhead slide

LEAD a discussion on how participants envision using empathy in their new job.

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Customer Service, "What's Your Gripe?"

Real Life Examples of Customer Service

STATE: You have looked at examples of customer behaviors, customer needs and when they are or are not being served.

STATE: Let's take a look at another real life example of customer service, and the use of empathy by a service provider.

ASK participants to keep the list of ways on *How to Demonstrate Empathy* in mind as they view the video.

DEBRIEF video segment by asking participants about ways in which they observed the airline agent practicing the use of empathy.

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Responding to Each State of Mind, Continued

ACTIVITY

Empathy as a Strategy for Calming Angry Customers

PURPOSE: To have participants share angry customer service interactions. The intended outcome is for it to be clear that in successfully handled situations, the customer's concerns were validated through the customer service provider's use of empathy.

LEARNING ADVISOR NOTE: Prior to beginning activity create 2 separate three column tables. Label the columns and board participant responses using the below example.

Example:

"Situation"	Customer's Behavior	Service Provider's Response	Handled Well?
• *return of defective merchandise*	• *yelled that toy was broken*	• *stated that also had to return same broken toy*	• *yes*

STATE: We have all agreed that angry customers are the hardest "State of Mind" to deal with. Let's look at some examples of interactions with angry customers.

ASK participants put on their "customer hat" for the first portion of this activity. Encourage participants to describe situations in which **they were the customer** and became angry. Attempt to solicit stories where the support provider reacted both properly and improperly. Stop after 4 or 5 stories.

REPEAT the activity using the second table, but this time ask the participants to "change hats' and describe situations in which **they were the customer service provider** and the customer became angry. Stop after 4 or 5 stories.

DEBRIEF activity by asking participants to determine what was common to both sets of stories where the problem was handled well?

LEAD discussion to:

The use of empathy

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Responding to Each State of Mind, Continued

Use of Empathy

ASK: Can anyone define the word empathy?

EXPECT: Understanding, a showing of concern

STATE: Empathy is different than sympathy. Many times a customer will not welcome your sympathy as that emotion can be deeply personal, but everyone seeks to be understood. To understand someone's problem validates that person's "right" to have the problem. By empathizing with your customer you are recognizing their state of mind.

ASK: What actions should you take to display empathy towards your customer?

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Recognizing 4 Customer States of Mind, Continued

Clues to Aid in Determination of Customer "State of Mind"

- **Angry**
  - Insulting
  - Argumentative
  - Intimidating
- **Insistent**
  - Demanding
  - Direct
  - Assertive
- **Indecisive**
  - Avoiding
  - Fidgeting
  - Hesitant
- **Complacent**
  - Smile
  - Conversive

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Responding to Each State of Mind

Recognizing Different States of Mind Require Differing CSS Response

DISCUSS that rapport is most easily established when you adjust your behavior to address the customers' current state of mind.

ASK participants how they like to be treated when they are angry?

FLIPCHART responses.

REFER to responses and

ASK: Do you want to be treated this same way when you are indecisive?, Probably not.

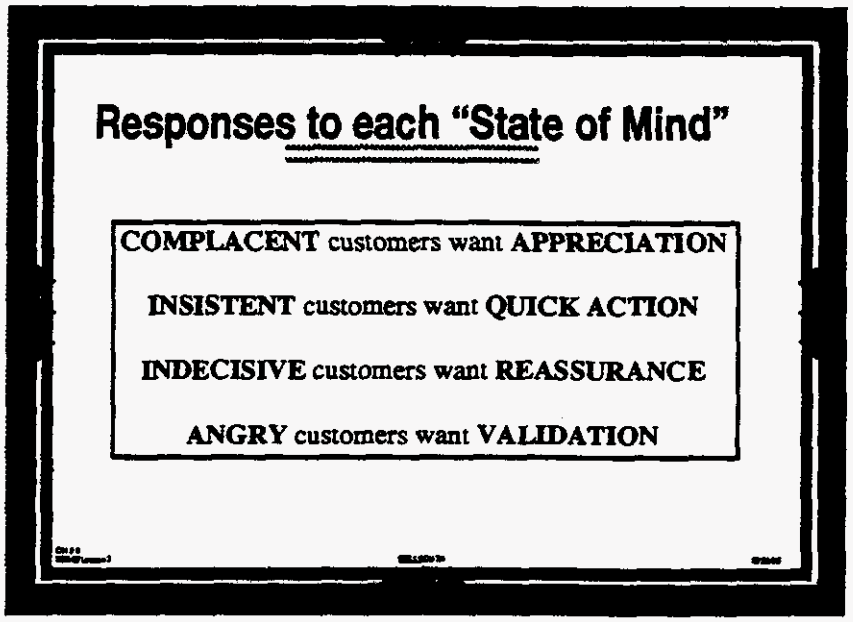
ASK: Which of the four behavioral types is hardest to respond to?

EXPECT: "Angry"

Questioning Technique

STATE: Each State of Mind has a specific questioning strategy you should use for initiating the resolution of a customer's problem.

LEAD a participant discussion as to how persons of each "State of Mind" wish to be responded to. Discussion should cover the following points:



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Recognizing 4 Customer States of Mind

Consider the Customer's State of Mind

EXPLAIN that based on our current needs and feelings, each of us acts in a certain way. The manner in which you act or ***react*** to others, changes as our individual needs and feelings alter with changing circumstances. The manner in which you interact with another is referred to as your current "**State of Mind**".

One could say that identification of "State of Mind", conducting opening approach and establishing rapport all occur simultaneously.

When you can identify a customer's immediate needs and understand their behavior you will have effectively identified your customer's current State of Mind. This is not a long involved process. In most cases you can identify a customer's state of mind in the first few seconds of a customer contact. The success of your interaction depends on your recognition of their State of Mind and your appropriate reaction to that State of Mind.

LEARNING ADVISOR NOTE: Yell angrily for a few seconds about a typical Small Business problem a CSS may encounter.

ASK: Guess what my current state of mind is?

EXPECT: Angry

STATE: No, currently I am complacent, though a minute ago I was angry, Although neither one is difficult to spot, a customer's state of mind can change quickly. You must quickly adapt your strategy of interaction to accommodate changes in their behavior.

Recognizing 4 Customer States of Mind

STATE: Behavioral psychologists have identified four basic states of mind that a customer is likely to be in when you initiate a customer contact and attempt to build rapport.

ASK: Can anyone identify one or more of these?

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Recognizing 4 Customer States of Mind, Continued

LEARNING ADVISOR NOTE: Poll participants for several minutes. Lead answers to the following states of mind.

PRESENT overhead when discussion complete. Use the overhead as a point of reference as you describe each State of Mind in detail.

INSTRUCT participants to read about the four States of Mind in their handout. Ask them to look up when complete.

Actively Listen to Determine Customer "State of Mind"

LEAD discussion of the four common customer States of Mind".

EMPHASIZE the need for active listening skills to gather clues regarding a customer states of mind.

EMPHASIZE that by understanding "*where your customer is coming from*", a specialist can quickly adjust his/her behavior to respond to the customer in a manner appropriate to the situation.

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Establishing Rapport and Credibility, Continued

Open-Ended Questions

STATE: You should now be familiar with some of the processes involved in establishing rapport/credibility with the customer. Use of questioning demonstrates to a customer that you are listening effectively and are responding to their problem with questions that help pinpoint or clarify their problem. We gain this additional information through appropriate questioning.

EXPLAIN that there are two types of questions that you can ask. They are:

- open-ended questions
- closed-ended questions

POLL participants, asking them to define each type of question and to give an example of the type of question they are defining. Lead discussion to:

Open-Ended Questions

Open-ended questions (who, what, where, when, how and why) get the customer to open up and give you additional information.

Examples of open-ended questions:

"How do you handle incoming calls when all your lines are busy?"

"Tell me, how do you attract new business?"

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Establishing Rapport and Credibility, Continued

Closed-Ended Questions

Closed-Ended Questions

Closed-ended questions allow the customer to give you a quick yes/no answer without elaborating. This is not desirable when you are attempting to gain additional information to take the lead and make a recommendation.

Examples of closed-ended questions:

"Do you get a lot of new business from incoming calls?"

"Do you frequently get call waiting tones while you are on the phone?"

TRANSITION to the next topic by explaining that asking the appropriate questions will aid in the establishment of rapport. Appropriate use of questioning will aid you in determining your customer's mood or what we will refer to in the next topic as a *Customer's state of mind*

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Establishing Rapport and Credibility

Establishing Rapport

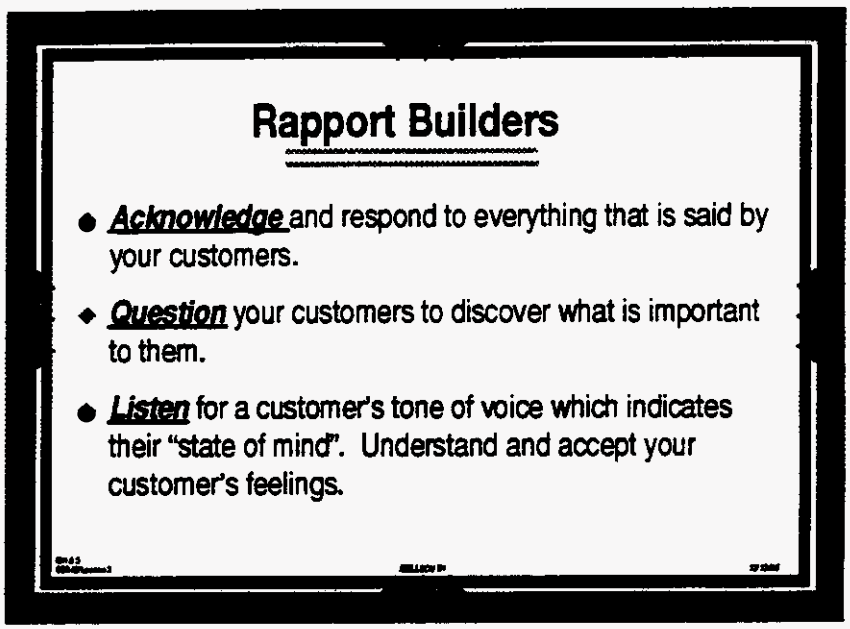
ASK: What is rapport?

FLIPCHART their responses.

LEAD discussion to a summary of the flip charted responses. Responses should correlate to the three below statements:

- understanding what someone **wants/needs**
- a **relationship** you have with someone
- ability to **communicate** comfortably

ASK: What should you do to establish rapport?



STATE: Rapport is successfully established when you listen effectively to a customer and can identify and address the customer's:

- needs
- feelings
- behaviors

EXPLAIN that a component of successfully satisfying a customer's needs is through appropriate use of questions as a discovery tool.

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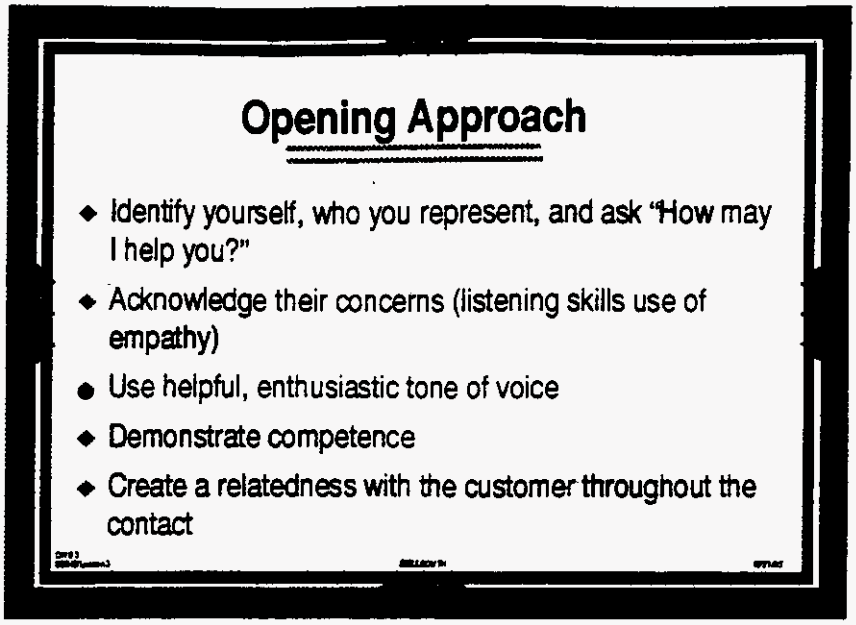
Opening Approach



Detail of Above Overhead

- Be professional and identify who you are, who you represent, and how you can help your customer.
- Establish and build trust and credibility. The customer should think of you as: **honest, helpful, friendly, knowledgeable,** professional and competent. (Example: Listen to the customer and acknowledge their concerns.)
- Display that you have a good, helpful, enthusiastic tone of voice.
- Demonstrate your competence. Ask appropriate questions, answer questions, and present information clearly and honestly.
- Create a "relatedness" to the customer from the moment you connect until you hang up.

STATE: All of the items above can improve your relationship with the customer and help in establishing credibility.

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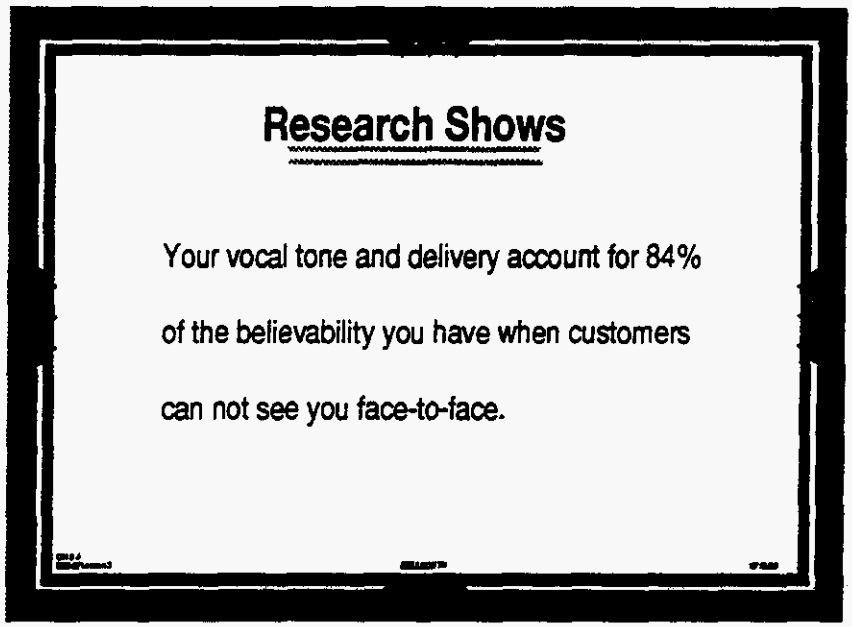
Opening Approach, Continued

Vocal Tone and Delivery Are Critical

ASK: Which one of those items do you feel is the most important?

LEARNING ADVISOR NOTE: Poll participants prior to introducing slide.

STATE: Research shows that your vocal tone and delivery accounts for 84% of the believability you have when customers can't see you face-to-face.



ASK: In order to establish a relationship such as I just outlined, a variety of elements are used. One of the most important elements to be considered when establishing credibility with your customer was discussed in the Core curriculum. Can anyone identify it?

EXPECT: "effective listening"

Another important element is through the establishment of rapport.

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Overview, Continued

Take Responsibility For Problem Solving

STATE: When customers have problems, they want to know the Specialist can quickly resolve the problem. They want to know that they will not be transferred around the organization and left with the feeling that ***they*** are responsible for resolving their own problem. The actions you take will greatly influence the customer's perception of ***Bell*South.**

EXPLAIN that on each call, it is a CSS responsibility to identify all information necessary to determine the cause of a customer problem. After obtaining all necessary information, and identifying the problem, one must then determine if the problem can be solved by one's own action or if the problem must be passed to another entity for resolution. Remember to use the resources available to you to obtain necessary information/data. Don't ask customers unnecessary questions. This will annoy them if they know you already have the information on file.

If it is a CSS responsibility to resolve, you must take ownership of the problem and create customer confidence in your ability and desire to take whatever steps necessary to resolve. If the customer is not confident with you, ask him to give you a shot at resolving the problem.

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Preparing for the Customer

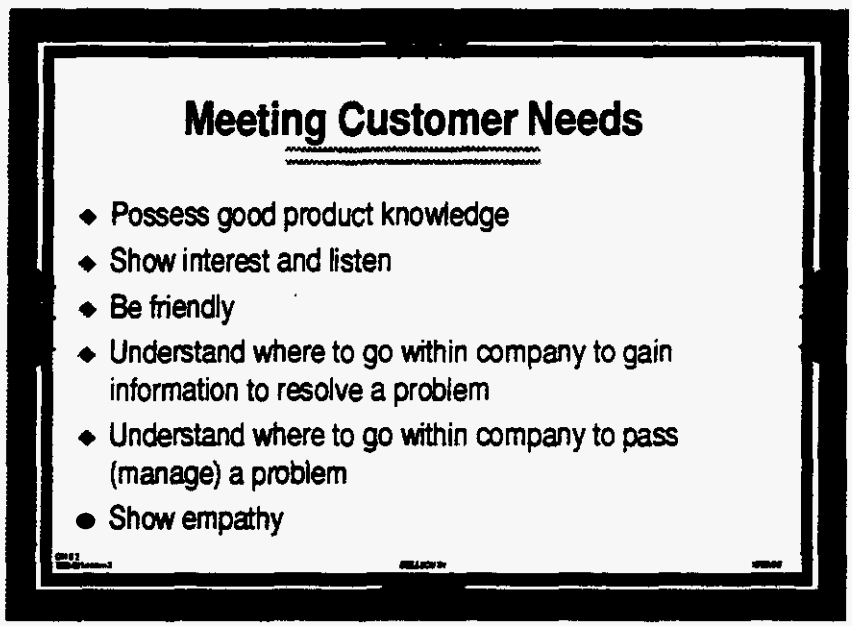
Be Prepared to Meet Customer Needs

EXPLAIN that since our business is conducted almost entirely over the telephone, a customer's tone of voice is your only clue to aid in the understanding of your customer's feelings.

ASK: What can you do to be prepared to meet your customer's needs?

BOARD answers:

LEAD discussion to:



EXPLAIN that a customer's first impression of you as a competent, empathetic person possessing the ability to address their problem will set the tone for the entire customer interaction. Thus your opening approach is critical to successful problem resolution. This is also the customer's impression of BellSouth.

STATE: Let's take a look at your "**Opening Approach.**" Your opening approach helps in establishing rapport and credibility and should:

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Objectives

At the conclusion of this lesson, participants will be able to:

- Define success factors for use in an opening approach
- Identify the 4 types of customer "States of Mind"
- Identify behavioral clues for each customer state
- Identify best approach for responding to each customer state
- Use empathy to calm an angry customer
- State ways to remain calm under pressure

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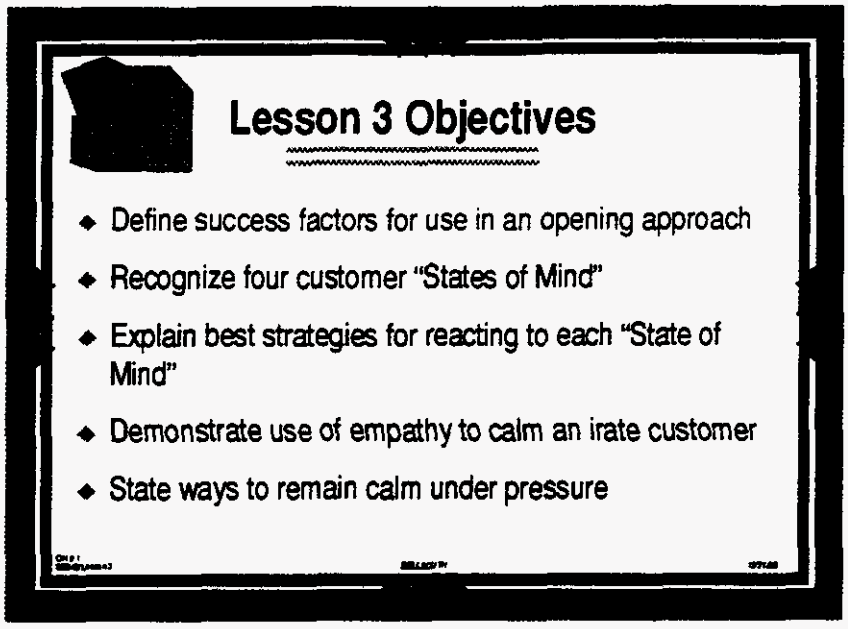
Q.U.A.R. Methodology: Questioning

Overview

Lesson Introduction

Begin this lesson by covering the objectives on the overhead.



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Lesson 3: Q.U.A.R. Methodology: Questioning

Learning Advisor Guide

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Training Aid, Continued

DIVISION OF CALLS RESPONSIBILITY
8 of 8

* **The following table serves only as a guideline. Specialists should use their best judgment at all times before passing a call to a Business Application Specialist**

YES = Specialist who receives call should handle
NO = Transfer to correct Specialist

CALL TYPE	SALES TEAM	CUSTOMER SUPPORT TEAM
– Billing Inquiries/ Claims/ Adjustments	No	Yes
– Bankruptcy Cases	No	No
– Directory Error Claims		
• Initial	No	Yes
• Subsequent	No	Yes
– Miscellaneous		
• Requests for Directories	No	Yes
• Annoyance Call Problems	Yes	Yes
• Payment Arrangements	No	No
• Location of Payment Centers	No	No
• Calling Card Request	Yes	Yes
• Intracompany Order Inquiries	No	Yes
• Dcty Intracompany Requests	No	Yes

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Training Aid, Continued

DIVISION OF CALL RESPONSIBILITY
6 of 8

ACRONYM	EXPLANATION	WHO
DPA	different premise address	**BAS**
PIC	pre-designated inter-exchange carrier	**BAS/CSS**
CREX	USOC for outbound call block	**BAS/CSS**
RES to BUS	consumer to business	**BAS**
BUS to RES	business to consumer	**BAS**
CHNG BASIC CLS SVC	change basic class of service	**BAS**
CHNG TN	change telephone number	**CSS/BAS**
CHNG CFN	change call forwarding number	**CSS/BAS**
CHNG RCYC	change number of ringing cycles	**CSS/BAS**
INTRA CO. C or D	intra-company change or disconnect	**CSS**
DUAL SVC	initiate dual service while business in process of changing locations	**BAS**
SEPARATE BILL	create separate bill for individual lines billed to same account	**CSS**

NON-REVENUE generating calls from consultants, answering services and intra-company should be handled by **CUSTOMER SUPPORT SPECIALISTS.**

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Training Aid, Continued

DIVISION OF CALLS RESPONSIBILITY
7 of 8

YES = Specialist who receives call should handle
NO = Transfer to correct Specialist

*** The following table serves only as a guideline. Specialists should use their best judgment at all times before passing a call to a Business Application Specialist**

CALL TYPE	SALES TEAM	CUSTOMER SUPPORT TEAM
– N Orders	Yes	No
– T&F Orders	Yes	No
– C Orders		
• Add/Remove optional features	Yes	No
• Calling Cards	Yes	Yes
• CREX	Yes	Yes
• PIC	Yes	Yes
• DPA	Yes	No
• Res to Bus	Yes	No
• TBE (R-Orders)	No	Yes
• Add/Remove ADL Lines	Yes	No
• All Others	Yes	Yes
– D Orders - Co Initiated	No	Yes
– D Orders - Cust Initiated	Yes	Yes
– Record Orders	Yes	Yes
– Transfer of Contracts	No	Yes
– Pending Orders Inquiries	Yes	Yes
• HN - APPL Only		
• PD - Add/Delete S&E > APPL		
– Toll Inquiries	No	Yes

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Training Aid, Continued

Internal Entities With Whom CSS Can Partner to Solve Problem (PROBLEM SOLVING)

4 of 8

Entity	Function	Provides information to...
Corporate & External Affairs	• Acts as liaison between BellSouth and Public	1. Provides information to resolve needs of customers
Calling Cards	• Programs calling cards and reference of calls	1. Expedite calling card request 2. Verify or change PIN numbers
Work Maintenance Center (Dispatch)	• Routes installers and repairmen on orders or trouble tickets	1. Check on missed appointments 2. Verify dispatch
FACS or AFIG (Field Assistance Group)	• Assigns cable facilities to orders	1. Resolve manual facility assignments, usually address related
Legal	• Assist in decision making • Handle suits and legal inquiries	1. Address customer claims of "*loss of business*"
Line and Number Admin.	• Controls distributions of telephone numbers and SFG's	1. Aid in the obtaining of telephone numbers should ATLAS not respond 2. Create a multi-line hunt group
RCMAG	• Program Services. • Connect Lines • Disconnect Lines • Suspend services.	1. Verify that features have been programmed on a customer's line 2. Verifies that cable pair is working

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Training Aid, Continued

Internal Entities With Whom CSS Can Partner to Solve Problem (PROBLEM SOLVING)

5 of 8

Entity	Function	Provides information to...
BAPCO	• Handles paid advertising for telephone directories	1. Address customization issues on yellow page listings/ advertisements 2. Address customer claims/complaints regarding incorrect white/yellow page listings/ advertisements
TIRKS (South-Central only)	• Assigns critical dates and facilities to designed orders	1. Enable order to work on due date

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Training Aid, Continued

Internal Entities to Whom CSS can Pass Problems For Resolution (PROBLEM MANAGEMENT)

2 of 8

Entity	Function	Pass-Off When...
Repair Service	• Take trouble ticket • Test Line • Make Appointments • Dispatch repairman • Clear trouble	1. Customer records indicate a service should be working, but customer reports that it is not working
Security	• Protects buildings, people and network • Investigate integrity problems, internal and external • Toll fraud	1. A customer calls with information on threats to our network, buildings or people 2. CSS has investigated claims of tollfraud and they appear valid
Interface Specialist	• CSS Subject Matter Expert Specialist • Acts as CSS back-up to the Customer Support Specialist team • At peak times may take inquiry calls and resolve customer issues, and problems	1. Receiving intercompany calls questioning a pending order or issuance of a order 2. Large adjustments need to be computed and issued 3. Interdepartmental liaison needed to expedite complex customer support issues 4. Special projects require extensive closed key time 5. Specialist does not have knowledge to resolve/ manage customer problem

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Training Aid, Continued

Internal Entities to Whom CSS can Pass Problems For Resolution (PROBLEM MANAGEMENT)

3 of 8

Entity	Function	Pass-Off When...
Team Facilitator	• Assists the Customer Support Team Manager in administrative duties • Answers technical and general questions from CSS • Evaluate and allocate the workflow between CSS and interface • Sits with team members to enhance skills and expertise.	1. Customer insists on speaking to a supervisor 2. Access/ adherence objectives are not being met 3. Specialist does not have knowledge to resolve/ manage customer problem
Memory Call Help Line	• Assists customer in set-up of Memory Call features and answer questions	1. When customer has questions regarding Memory Call ask them to call 1-800-448-1110
Directories(out of town)	• Quotes charges and orders directories for out of town white & yellow pages	1. When customer has questions regarding out of town white or yellow pages ask them to call 1-800-682-4000

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Training Aid

Internal Entities to Whom CSS can Pass Problems For Resolution (PROBLEM MANAGEMENT)

1 of 8

Entity	Function	Pass-Off When...
Annoyance Call Bureau	• Takes annoyance call report • Tracks annoyance data • Investigates complaints • Interfaces with customers/ perpetrator • Referral to security	1. Customer complains about receiving unwanted calls
Collections	• Collect past due accounts	1. A customer calls regarding restoration of service 2. A customer complains about denial of service 3. A customer calls regarding dishonored checks
Consumer	• Complete handling of Residential telephone service	1. A residential customer is accidentally connected to Small business
CPNI	• Handles customers that have restricted their accounts from BellSouth Sales force.	1. Account is restricted, CSS can not access customer's account
Equipment	• Sales and Service of Telephone Equipment	1. Customer makes a request for telephone equipment
Marketing (Premise)	• Sales and Service of large customers. • Complex network services	1. Customer line size is outside of Small Business parameters 2. Customer has a system such as ESSX

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Problem Solving, Continued

Problem Management or Problem Solving Cases

- Customer calls regarding their bill. She is irritated because she keeps receiving bills for a line that she had called to have disconnected several months ago.
- Customer calls saying that he recently moved his business to his residence and ordered voice mail at time of change. He is asking how to use the voice mail system.
- An installer calls you about a pending order. He needs to know if customer is eligible for service plan. He says that he can not determine from order.
- Customer calls to place an order for a directory in another city.
- Customer calls demanding to know why he received 2 BellSouth calling cards when he never ordered any. He wants to know what to do.
- Customer calls saying that his transfer of service (T&F) has not been done. He insists on knowing why he has not been given service in new location. He needs it working ASAP and if can't do immediately than keep old location working.

DEBRIEF activity by explaining that the above scenarios provided all the necessary information from which to answer the questions posed in the activity.

In real life however, it will be up to the CSS to take control of every conversation, quickly gathering all necessary information so that a determination of call management or resolution can be made.

EXPLAIN that you will learn how to look up these entities in an on-line internal directory in a later lesson. Your team leader can also provide you with a listing of "*Quick Switch*" numbers which are internal speed dial numbers.]

TRANSITION to next topic by explaining that in coming lessons we will learn more about the process involved in identifying which calls are "solved" by the CSS and which calls are "managed".

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Problem Management Course

Check For Understanding

Lesson 2

1) **Provide 5 examples of specific call types that are in scope for a CSS**
   1. _____
   2. _____
   3. _____
   4. _____
   5. _____

2) **List the 3 codes for missed appointments and their definitions**
   1. ____ - _____
   2. ____ - _____
   3. ____ - _____

3) **List 3 instances when it is appropriate for a CSS to pass a call**
   1. _____
   2. _____
   3. _____

4) **Use the following description of a problem situation to:**
   A. Construct a concise problem statement
   B. Indentify entity (if any) to aid in resolution

   Customer calls regarding their call waiting. Customer states that she had called 2 weeks ago to disconnect and not working. They are again requesting disconnection and a credit for the last several weeks.

   A. _____
   _____
   _____

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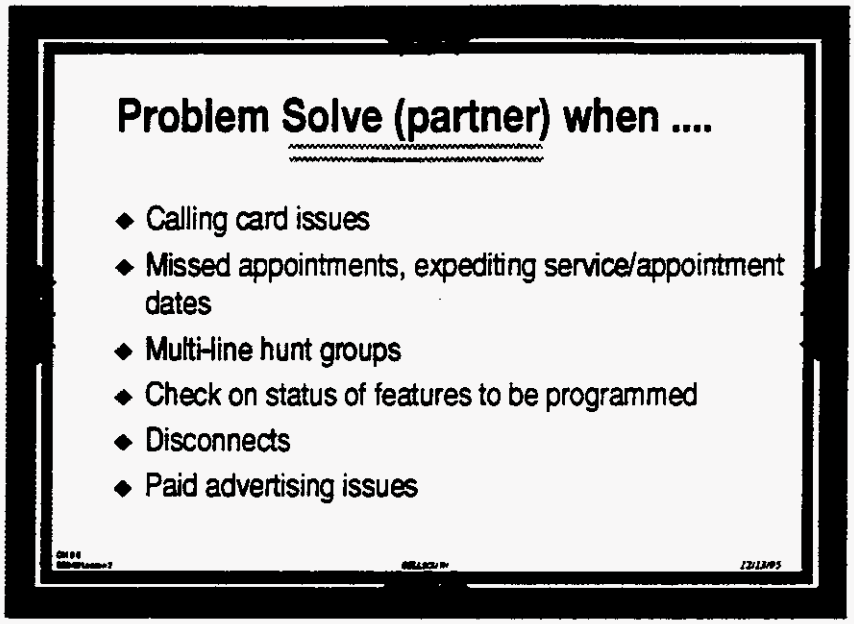
Problem Solving

Definition of Problem Solving

EXPLAIN that, like problem management, there are specific types of situations when it is within the scope of CSS responsibilities to resolve the customer's problem *without* passing it to another BellSouth department.

CONTINUE with the explanation of problem solving vs problem management by introducing overhead detailing problem solving.



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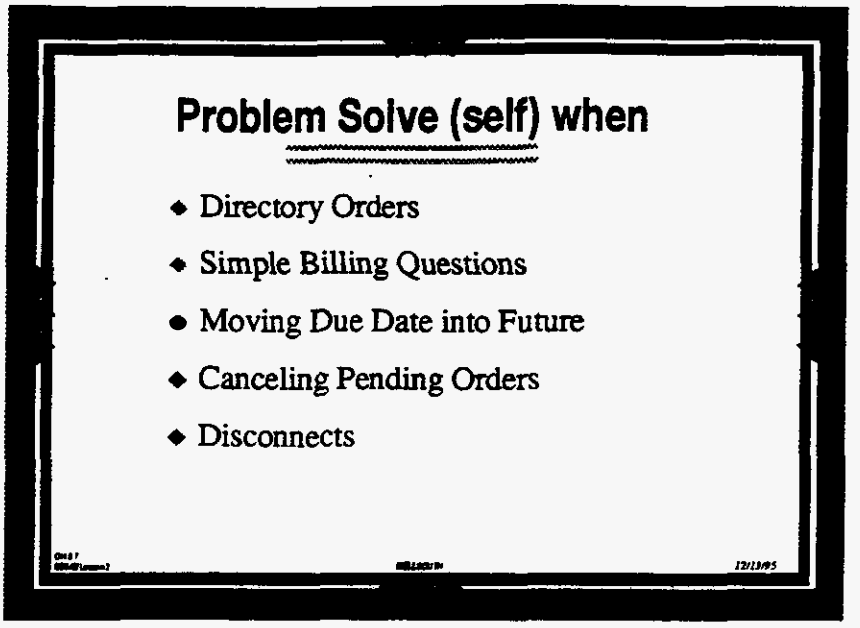
Problem Solving, Continued

Definition of Problem Solving (continued)



Problem Management or Problem Solving Activity

REFER participants to their Handout for a training aid that will assist in the identification of whether a problem should be managed (passed) or resolved.

PRESENT the below scenarios as means of practicing use of the training aid. Read each scenario separately and allow participants 2-3 minutes to answer the questions below.

ASK participants to write the answers to the following questions in their handouts.

1. Identify scenario as a problem management call or a problem solving call, provide rationale

2. Identify appropriate party to either gather information from or pass call to

3. Identify appropriate follow-up

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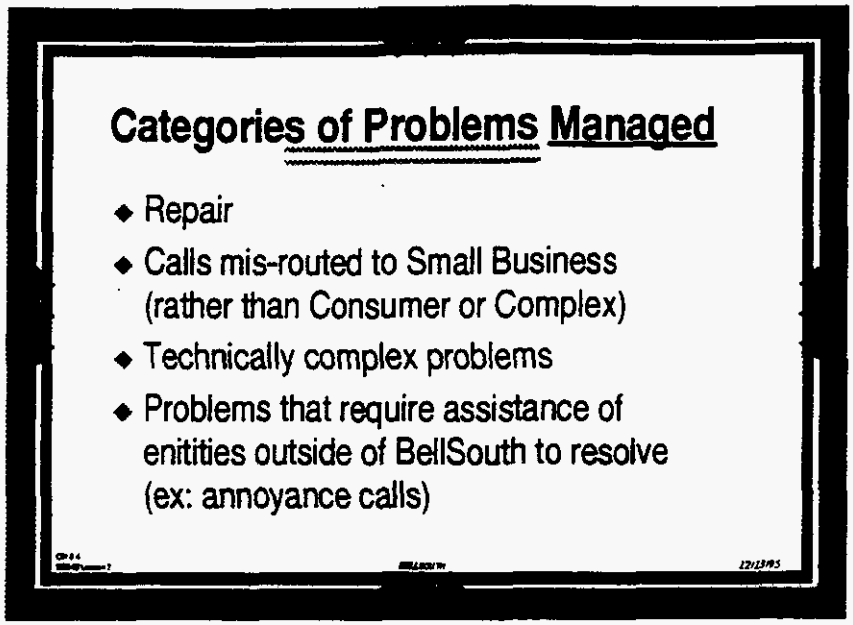
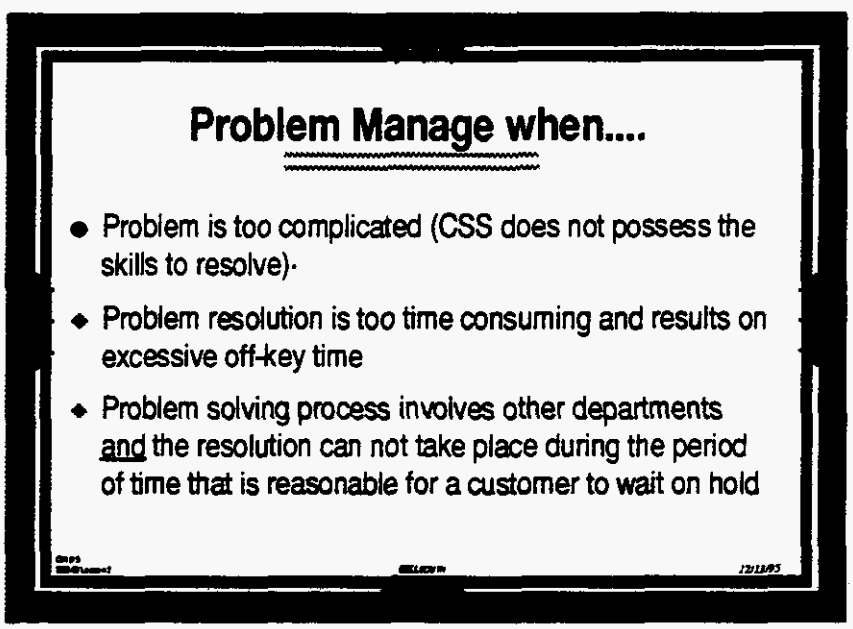
Problem Management, Continued

When to Problem Manage (continued)



Second Test of Problem Management

INTRODUCE overhead by explaining that there is a second test of when a problem should be managed rather than resolved by the CSS. If a problem does not fit into one of the previous categories but....



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Problem Management, Continued

When you pass a Problem, its Still "YOUR" Problem

EMPHASIZE that problem management does not mean that every CSS does not still "own" the successful resolution of the problem.

EXPLAIN that "managing a problem" can be thought of *as the process of partnering with another internal BST department.* As a partner to the resolution process, the CSS continues to have a responsibility to the customer to ensure the problem is resolved to their complete satisfaction. Thus, follow up with the customer, ensuring that one's BST partner has resolved the problem is an important aspect of the problem management process. A problem should not be considered resolved until the CSS has obtained a statement of satisfaction from the customer. That statement is their only guarantee that the customer's expectations have been met (and hopefully exceeded).

EMPHASIZE that the follow up process;

- aids in exceeding customer expectations
- increases favorable comments on customer survey cards

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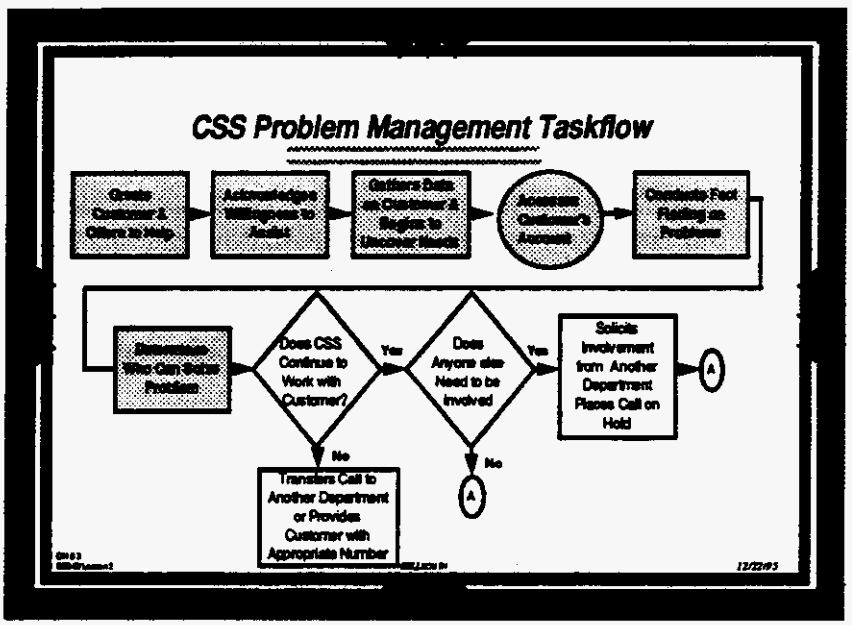
Three Courses of Action to Resolve Problems That Are In-Scope, Continued

LEARNING ADVISOR NOTE: Demonstrate the similarity in initial approach by showing the CSS generic taskflow diagram. This diagram was originally presented in the introduction to the CSS curriculum.

EXPLAIN that the areas in green are common to every call. Only at the point of the first diamond decision box does the process separate into problem management and problem solving tasks. Prior to that time the CSS is:

- greeting the customer
- conducting an opening approach
- asking questions to determine the nature of the problem
- arriving at an understanding of the problem
- obtaining agreement from the customer on problem



STATE: We will next explore when a situation calls for problem management as the method for resolving a problem.

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Problem Management

Definition of Problem Management

STATE: Problem Management can be defined as the process of passing a call to another team member within your office or to another department in order to solve the problem. In this instance you will have managed the problem but another team member has actually resolved the problem.

EXPLAIN that in the problem management process, a problem is "managed" through the identification of the appropriate party to which the problem can be "passed" for resolution.

When to Problem Manage

DISCUSS when it is appropriate to pass the problem to another entity (problem management) rather than resolve oneself (problem resolution).

EXPLAIN that through the use of good questioning technique, a CSS can quickly determine the category of a customer problem. Using this information, one can quickly conclude whether a problem can be resolved by oneself or the problem could be more effectively resolved by another BST department.

EMPHASIZE that it is important to ask sufficient questions to understand the extent of the problem. This ensures that the party receiving the call is the correct party and that the customer will not have to be transferred to a third department. An understanding of the problem should be sufficient to be able to provide a concise explanation of its nature to the other BST department.

INTRODUCE the overhead.

EXPLAIN that the categories of problems appearing on the overhead are types of problems that are *out of scope* for the CSS job and the customer's needs are best met by passing the call to the correct party.

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Three Courses of Action to Resolve Problems That Are In-Scope

Problem Management Activities

ASK: Can anyone tell me the three options you will have in order to properly handle a call?

LEAD discussion to:

- resolve the problem completely by yourself
- resolve the problem yourself with the help of information provided my another entity (partnering)
- pass the call to someone else for resolution

ASK: Which activity do you think your customer would prefer you to do?

EXPECT:

Resolve the problem completely by yourself

ASK: Which activity do you think your manager would prefer you to do?

EXPECT:

Resolve the problem completely by yourself

EXPLAIN that all three activities carry equal importance. One of the skills that you must develop as an effective CSS is to understand when it is appropriate for you to resolve the problem (*problem solving*) or when is it more appropriate to pass the call to another ***BellSouth*** department for ultimate resolution (*problem management*). BellSouth has developed specialized entities that are sometimes better suited to resolve customer problems than the individual CSS.

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Three Courses of Action to Resolve Problems That Are In-Scope, Continued

First Choice: Resolve Yourself

EXPLAIN that as much as business office management encourages each CSS to resolve as many customer problems as possible without passing them to another person, management also realizes that not all problems are within a CSS ability to resolve.

In the coming lessons, participants will learn to identify specific problem types and identify the needed information required to determine if it is appropriate to resolve without partnering with another BellSouth employee or BellSouth entity.

Only after the parameters of a problem have been identified through questioning and arriving at an understanding of a customer's needs, can a CSS determine the proper path to resolution.

The "exception' to this general rule of thumb is there may be an occasion when time constraints or other limitations require that you passoff the problem for resolution.

INSTRUCT participants to look closely at the situation before determining the problem requires passoff.

TELL participants that they should always refrain from passing a problem or "passing the buck", unless it out of their scope to resolve.

EMPHASIZE that a CSS should always default to the idea that he/she can resolve or problem solve each customer problem.

Relationship of Problem Solving/ Management

EXPLAIN that both problem solving and problem management processes consist of a series of similar actions. It is only after the problem has been properly identified does the path to resolution become clear.

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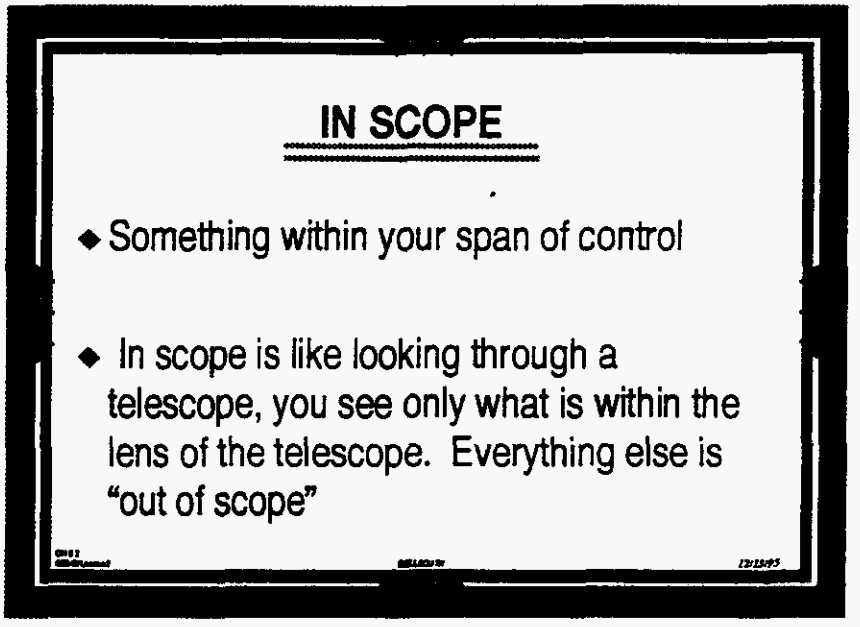
Scope of CSS Problem Management Activities

Problem Management Activities

STATE: It is critical that you understand the scope of CSS problem management activities.

LEAD discussion to it is important that participants understand the problem before making a decision on the manner in which the call should be handled.

ASK: Can anyone define the term "in scope" for us?



LEAD a discussion about activities that are in/out of CSS job scope. Ask participants to decide as a group if the below list is part of their job (in scope) or out of scope. Participants should justify their responses.

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Scope of CSS Problem Management Activities, Continued

Categories of Customer Problems

STATE: The major categories of customer problems are as follows:

1. Missed Appointments

Orders that we have not worked within the timeframe we have committed to the customer. Typically there are three(3) reasons for missed appointments. Each one has its own identification code.

Subscriber Access (SA) When the subscriber is not at location at the time the order is scheduled to be worked.

Company Load (CL) When we cannot work the customer's order because we have overscheduled the technician's workload.

Plant/Facility (PF) When orders can not be worked due to cabling problems or lack of necessary cable pairs to initiate service.

2. Directory Advertising Error

- Involves either white or yellow pages or both
- Incorrect spelling of customer's business name
- Incorrect customer telephone number or address

3. Billing Explanations

The most common billing explanation is:

- Responding to customer questions concerning the "*other charges and credits*" portion of a telephone bill
- Number 1 question is regarding a partial month billing in addition to a full month billing.

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Problem Management Activities

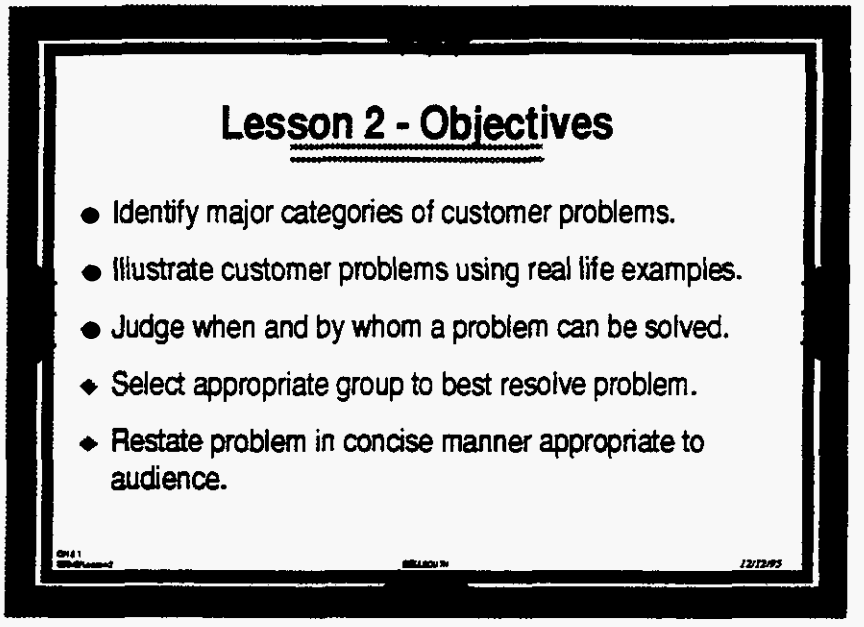
Introduction

Overview

In this lesson you will learn the major categories of customer problems. Participants will also be able to judge when and by whom a problem should be solved. They will learn to recognize important information necessary to determine cause of problems and if recurring problems.

Objectives

At the conclusion of the lesson, participants will be able to:



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Introduction, Continued

Problem Management = Customer Service

STATE: It is important that you as a Customer Support Specialist understand the importance of being able to recognize customer problems and to be able to resolve them.

EXPLAIN that our customers are our most important commodity. Without them, Small Business would cease to exist.

EXPLAIN that Small Business customers now have a choice in local service. BellSouth would like to be the vendor of *choice* for our customers. To do this, we must always be willing to proactively place our customers first. As a CSS you can best be proactive by solving problems and making sure that we are striving to meet our customers' expectations in all areas of service.

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Lesson 2: Problem Management Activities

Learning Advisor Guide

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Problem Management Course

Check For Understanding

Lesson 1

1) **Define Problem Management as it applies to the CSS job.**

_____

_____

2) **Define Problem Solving as it applies to the CSS job.**

_____

_____

3) **State three reasons why Problem Management is important to BellSouth.**
   1. _____
   2. _____
   3. _____

4) **List the 4 parts of the Q.U.A.R. methodology and provide an example of the use of each in a typical CSS customer contact.**
   1. _____ - _____
   2. _____ - _____
   3. _____ - _____
   4. _____ - _____

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Viewing Problem Solving as a System, Continued

STATE: Like the domino effect you observed before, having a systems perspective entails understanding the concept of cause and effect.

PRESENT the following analogies/stories to help illustrate the concept of systems thinking:

- Systems thinking is like watching a videotape versus looking at a picture.
- Systems thinking is like seeing the forest and the trees.

ASK participants to come up with their own analogies using BellSouth.

The Interconnective -ness of Events

EXPLAIN that you will provide an example of what is meant by the interconnectiveness of things by reading the following story:

A cloud masses, the sky darkens, leaves twist upward, and we know that it will rain. We also know that after the storm, the runoff will feed into groundwater miles away, and the sky will grow clear by tomorrow. All these events are distant in time and space, and yet they are all connected within the same pattern. Each has an influence on the rest, an influence that is usually hidden from view. You can only understand the system of a rainstorm by contemplating the whole, not any individual part of the pattern.

ASK participants why they think adopting a systems thinking perspective is relevant to them.

EXPECT answer to include the following:

- New processes of CSS position will require them to think more holistically (big picture)
- They need to be able to trace a problem back to its cause
- They need to adopt this mind-set in order to add more value
- It is a way of making sense out of complex issues or problems

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Viewing Problem Solving as a System, Continued

SUMMARIZE the inter-relationship between the Q.U.A.R. methodology and systems thinking for participants.

- Q.U.A.R. is a system in itself
- Q.U.A.R. directs a CSS to look at problem solving as a methodology or systematic process

EXPLAIN that in coming lessons we will learn more about the Q.U.A.R. methodology and how to apply it to their customer interactions.

TRANSITION to next lesson by explaining that in the next lesson we will learn about:

- the scope of problem management activities
- the various systems a CSS must interface with in order to resolve problems
- how the CSS must learn about one system to diagnose a problem occurring in a related system

LEARNING ADVISOR NOTE: On the following page is 1 of 3 *Checks For Understanding (CFU).* The second appears after lesson 2. The third is Lesson 8, *Putting it All Together* and is the CFU for lessons 3-7.

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Viewing Problem Solving as a System

LEARNING ADVISOR NOTE: Prior to the beginning of the course, set up the figurine so when you hit the first domino, all the dominoes knock each other down.

Systems Thinking Overview

STATE: Effective problem management is a combination of a methodology such as Q.U.A.R., which provides a process road-map and an overall framework or "frame of reference" for using the Q.U.A.R. process. The frame of reference or framework that I would like you to consider is commonly referred to as "Systems Thinking".

KNOCK over the first domino in the domino figurine. This should get the participants' attention.

ASK the participants what they think this domino display illustrated, after all the dominoes have fallen.

Answers may include:

- Causation
- Relationships
- Everything impacts everything else

EXPLAIN that these concepts are a foundation for the course. In order to solve problems effectively, you must be able to understand cause-effect relationships, and how variables affecting the problem impact one another.

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Viewing Problem Solving as a System, Continued

A System is a Collection of Parts

STATE: The definition of a "system" is a collection of parts which interact with each other to function as a whole. Examples of systems include the nervous system, the legal system, or the cooling system in your car.

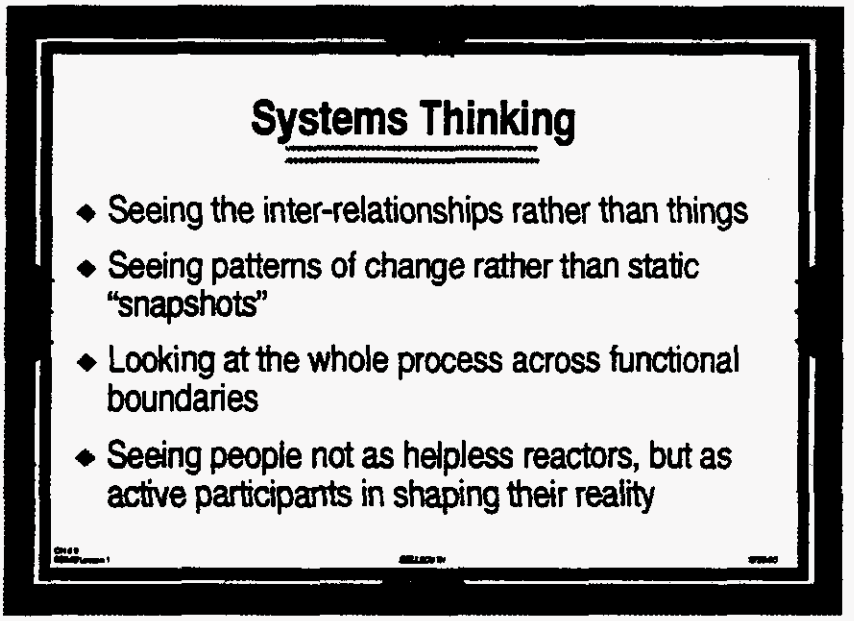
PRESENT: The cooling system in a car, for example, may consist of a radiator, a fan, a water pump, a thermostat, a cooling jacket, and several hoses and clamps. Together they function to keep the engine from overheating, but separately they are useless. To do the job, *all* of the parts must be present *and* they must be arranged in the proper way. Moving one end of the hose just an inch is enough to put the cooling system (and the car) out of commission.

ASK: What are the "collection of parts" in your system at work?

LEAD discussion to any of the following examples:

- computer system
- the various sub-systems (BOCRIS, DOE, SONGS, that reside "inside" of Overture
- repair is a system which interacts with customer service
- a cable is a system of wire pairs
- business office is a collection of individual CSS

STATE that systems thinking is based on:



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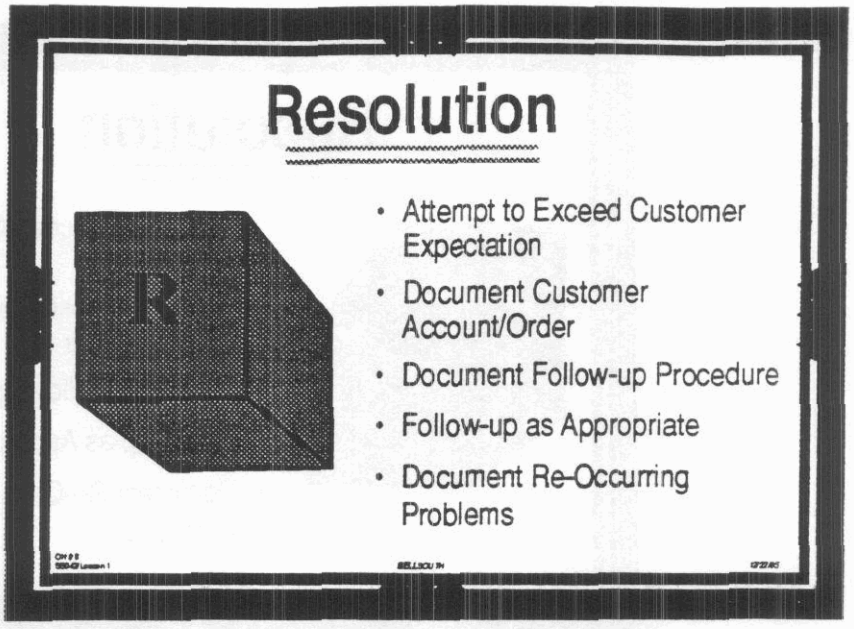
Making the Difference through Problem Management, Continued



Action

1. Determine if problem can be solved by self or passed(managed) to another
2. When a problem can be resolved through purchase of a BST product/service then...
3. Lead Generation is a form of taking action.

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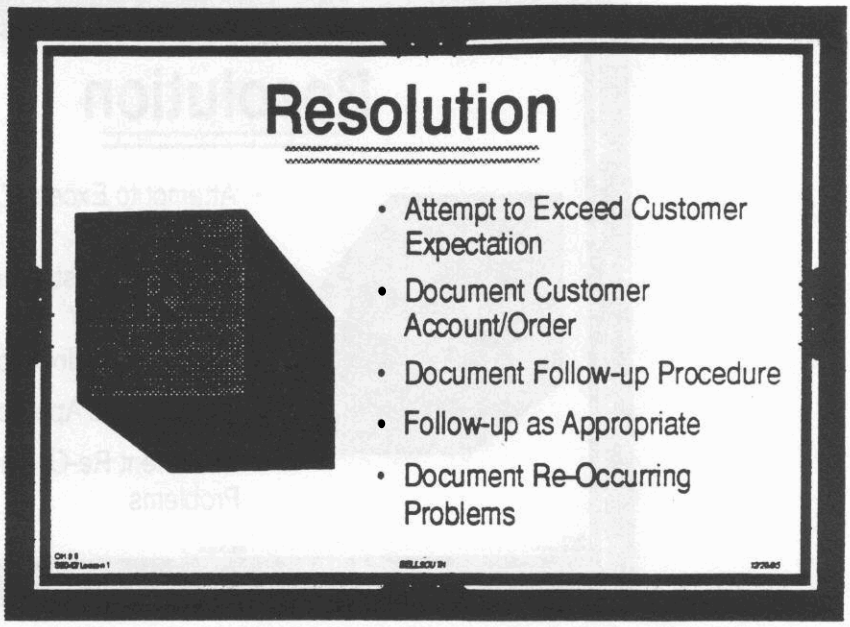
Making the Difference through Problem Management, Continued



Resolution

1. Obtain statement of customer satisfaction
2. Document resolution on customer's account/order
3. Organize follow-up procedure to ensure resolution
4. Identify reoccurring problems for management review (continuous improvement)

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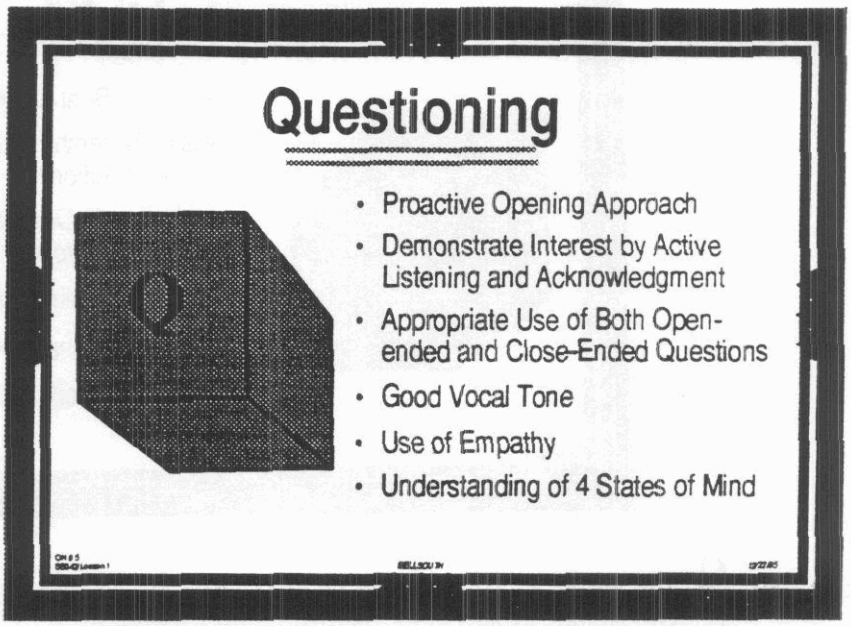
Making the Difference through Problem Management, Continued

SUMMARIZE each overhead detailing the Q.U.A.R. process. Make sure comments include the details appearing below each slide.



Questioning

1. Opening Approach - Establishing Rapport through understanding customer's "State-of-Mind"
2. Use empathy to identify with customer State of Mind

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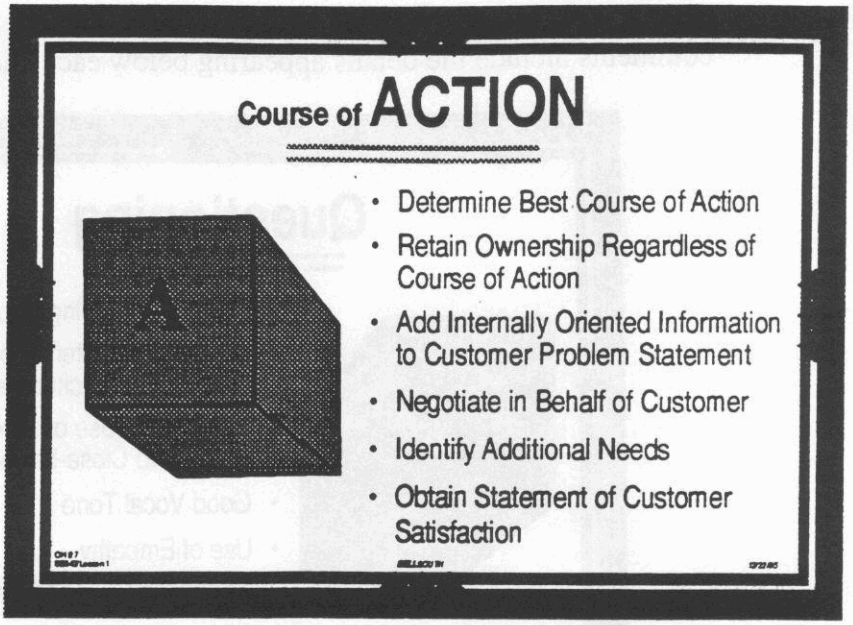
Making the Difference through Problem Management, Continued



Understanding

1. Understanding "Need" Behind The Problem
2. Understanding required information to produce concise **Problem Statement**
3. Understand course of action that will exceed customer expectations

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Attributes of Excellent Customer Service

What is Excellent Customer Service?

DISCUSS the attributes of excellent customer service. Lead discussion to include the following items. Board answers for use in video debrief.

LEAD discussion to

- Knowledge of job, products, services
- Flexible approach
- Good listening skills
- Empathetic attitude

LEARNING ADVISOR NOTE: Play next video clip. Clip is 8 minute segment from *48 Hours*. The clip shows

- a Rotor Rooter man who makes a very comfortable living exceeding expectations on a daily basis

DEBRIEF video clip, returning to the boarded list of attributes of excellent customer service.

LEAD conversation to how these same qualities are important to the CSS position.

TRANSITION to the next topic by explaining that we will next discuss attributes of excellent customer service in through following a process or methodology we have named "Q.U.A.R."

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Making the Difference through Problem Management

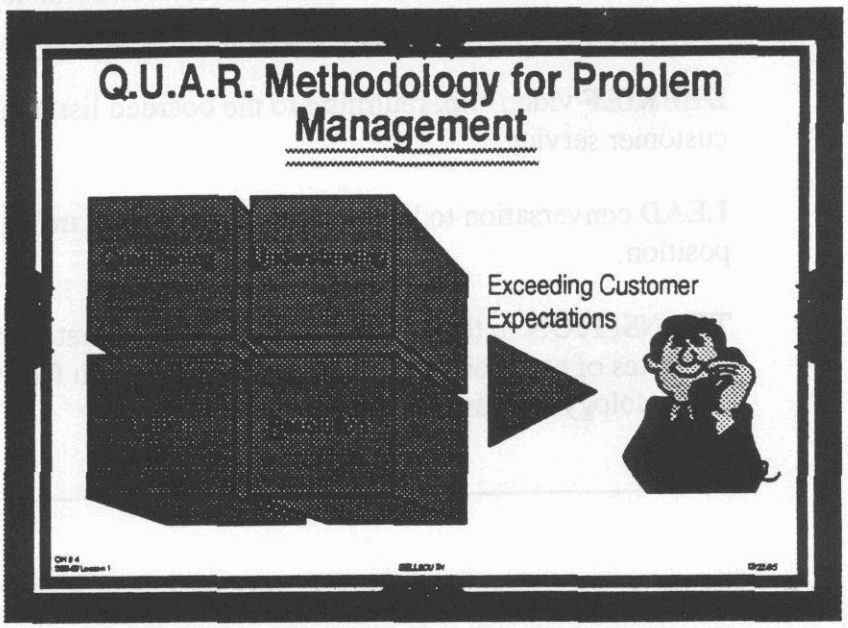
Using Q.U.A.R. Methodology for Effective Problem Resolution

STATE: Providing excellent customer service involves effective problem management. The Q.U.A.R. methodology is one method for ensuring that your response to a problem is both effective and that the resulting solution will generally exceed the customer's expectations.

Overview of Q.U.A.R.

INSTRUCT participants to read the Q.U.A.R. introduction in their handouts.

EXPLAIN briefly the four steps of Q.U.A.R. and how they work together to create effective problem resolution.



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Importance of Problem Management, Continued

Who is Your Customer - CD *Topic 1.3*

LEARNING INSTRUCTOR'S NOTE: Begin Topic 1.3 by clicking on the green *Continue* arrow. When prompted click on all person's on the screen to determine who is a customer. Click as well on the telephone. At conclusion of this topic point CD will automatically pause. **PAUSE** after completion of explanation on who is/is not an internal customer.

DISCUSS who do participants think will be the internal customers that they will encounter on their job.

EXPLAIN that in the next lesson we will look at internal customers in greater detail. We will look at two categories of internal customers, one's who we pass problems to for resolution and one's who we partner with as we resolve the problem ourselves.

ASK: Should we treat one category of internal customer different than another?

EXPECT: No

CONTINUE with remainder of topic.

ASK participants about their interactions with internal departments. Use the experiences of participants coming from consumer and repair to validate this concept.

- Were they treated as *customers*?
- When they weren't, did it affect their interaction with their external customer? How did they feel? Did they take it personally?
- How will partnering further the goal of excellent customer service?

DISCUSS partnering with internal customers.

LEAD discussion to the conclusion that there is value in treating internal customers with the same courtesy and respect as expected for external customers.

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Importance of Problem Management, Continued

Focusing on the Customer - CD *Topic 1.4*

Excellent Customer Service Equals Product + Relationship

LEARNING INSTRUCTOR'S NOTE: This topic provides a summary of the material covered on the CD

EXPLAIN that throughout the coming lessons we will examine various customer behaviors (or States of Mind) and the best manner in which to respond to customers. We will be looking at how appropriate responses to customers can be used as a means to provide excellent customer service.

TRANSITION to the next topic by stating: Now lets move on to the next topic where we will discuss problem management as a form of making a difference through providing excellent customer service.

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Importance of Problem Management

Problem Management as a Key CSS Skill

ASK participants about the roles and responsibilities of a CSS. Draw on their recollections of the curriculum introduction. The critical skills of a CSS were introduced at that time.

EMPHASIZE the tie in of a majority of critical CSS skills to the task of problem management.

Profit From Problems

DEBRIEF the video by discussing the importance of problem management as a central focus of the CSS position.

EXPLAIN that problem management or the effective handling of customer complaints is an example of providing excellent customer service. Thus the below logical linking can be made.

Include the following topic points in your conversation:

- a powerful way to satisfy customers
- a way of targeting areas for continuous improvement
- an opportunity to create loyalty
- a method for differentiating BST's competitive advantage

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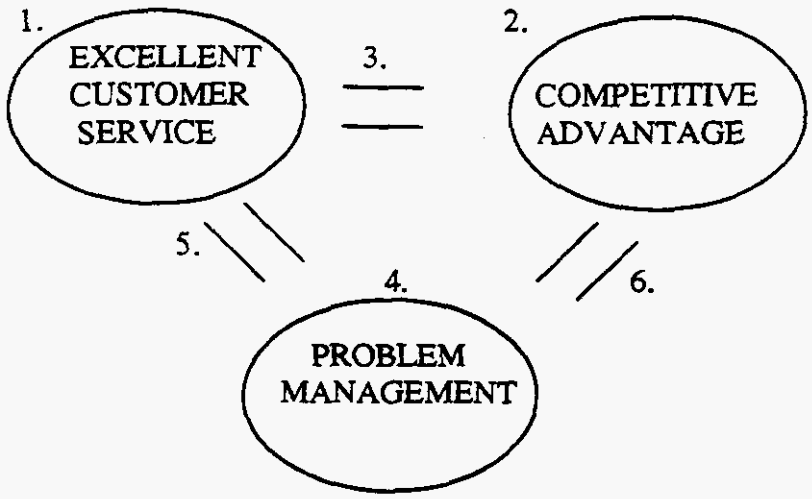
Importance of Problem Management, Continued

LEARNING ADVISOR'S NOTE: Demonstrate the interrelationship between customer service, problem management and BST's competitive advantage using the below diagram. Draw items in numbered order. Use logic: If A = B , and B = C, then A = C



TRANSITION back to the CD by explaining that many companies have been listening to their customers and have begun to improve their LEVEL of service.

LEARNING ADVISOR NOTE: Start CD by clicking on the green arrow on the bottom right hand side of the screen. Allow CD to pause naturally at end of topic.

DEBRIEF topic by leading a discussion that reviews the topic's highlights:

- Excellent customer service involves a personal touch
- Providing excellent customer service means exceeding (not just meeting) your customer's expectations
- Customer complaints need to be looked at in a positive light
- A customer who complains is giving you the opportunity to:
  - fix a situation that customer thinks is unsatisfactory
  - win back the customer's business
- Remember, don't take a customer complaint personally, its not directed at you.

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Customer Service Overview (CD ROM), Continued

Complaining Customers Are Valuable (continued)

SUMMARIZE discussion to:

- displeasing one customer may result in the loss of multiple customers
- you may never know a customer is displeased
- the cost to re-obtain a customer is great (example: the AT&T $50 check offer to return to AT&T)
- a complaining customer points out a possibly unseen weakness

Loving Complaining Customers

EMPHASIZE this last point by asking participants, "What does Sears think about complaining customers?" "Do they love complaining customers?" "Do we love customers?"

EXPLAIN that as CSS you are on the front line of hearing customer complaints which may point to a larger problem. Information you will be able to provide will give ***BellSouth*** valuable information about the effects of competition.

INSTRUCT participants to turn their attention to the television where they will witness an excellent discussion on the value of complaining customers.

LEARNING ADVISOR NOTE: Start videotape "*How to Profit From Complaining Customers*". Stop video player when prompted. Video length 12 minutes.

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Customer Service Overview (CD ROM), Continued

Loving Complaining Customers (continued)

ASK participants, "**NOW** do you love complaining customers?"

DEBRIEF video segment by leading a discussion about complaining customers participants have encountered in the past or instances in which they had been the complaining customer.

ASK according to Mr. Wexler, what is the most significant attribute a service provider must exhibit?

LEAD discussion to: A commitment to a long term relationship between the company and the customer.

CONTINUE debriefing video, covering as many of the below points as learning advisor deems important

- 1 out of 27 customers with a problem will complain to a company
- The vast majority of those who won't complain to a company will complain to friends and business associates
- Driving away customers by not responding to complaints gives competitors power
- A successful company makes it easy and comfortable for customers to complain
- Complaints can be made to be viewed as way of "helping" a friend
- To keep a customer, empathy is more important than actually solving the customer's complaint
- If you solve the customer's problem but are not empathetic in the process, you will lose customer
- The best possible problem solution is happily, helpfully solving the problem

ASK participants if, during a problem situation in which they were the customer, did CSR do any of the above.

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Customer Service Overview (CD ROM), Continued

Making the Difference - *CD Topic 1.2*

DIRECT participants attention back to the CD by polling them as to what were the items in the airline ticket counter example that were indications of varying levels of service?

TRANSITION to next topic by explaining that we will next explore the use of customer complaints as tools to discover when we are not meeting or exceeding a customer's expectations.

LEARNING ADVISOR NOTE: Begin Topic 1.2 by clicking on the green *Continue* arrow. This topic point will be stopped partially through in order to facilitate discussion.

PAUSE CD by clicking on ||, after presentation of the topic point,
"70% of customers who complain will return if their complaint is dealt with effectively."

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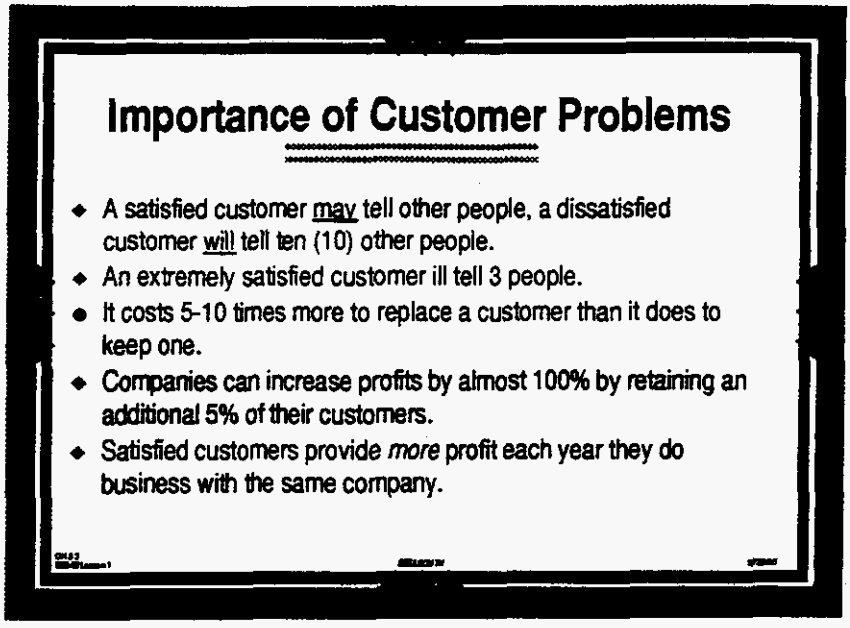
Customer Service Overview (CD ROM), Continued

Complaining Customers Are Valuable

INSTRUCT participants to refer to "Importance of Customer Problems" in their handout.



INSTRUCT participants to review this list and to keep it in mind as they view the following video segment.

LEARNING ADVISOR NOTE: Play next video clip. Clip is 8 minute segment from *48 Hours*. The clip shows

- a woman attempting to obtain satisfactory service from Sears for the repair of her washing machine

DISCUSS the implications of the above list for Sears. Make parallels to BellSouth in light of the new competitive environment. Cover the following:

- The dissatisfied woman in the video is not only telling 10 friends about her bad service, she's telling the world!
- This customer will think twice before purchasing again goods from Sears
- Her problem gave Sears the opportunity to identify a weakness in their customer service processes where they could take action to change in order to provide better future service
- As new competition hits BellSouth, dissatisfied customers will be easy targets

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Customer Service Overview (CD ROM), Continued

Today, *Service* Differentiates a Company Activity

DISTINGUISH the effect of customer service on business growth with the following story.

ASK participants the following questions. Instruct them to raise their hands if they agree. Ask them to keep hands raised until they no longer feel that the investment is wise.

- Who thinks that if I promise you a million dollar return, investing $1000 in a pizza delivery service is a good idea?
- Do you still think its a good idea if I tell you the pizza is not any better than the average pizza, but still promise you the million dollar return?
- What if I tell you that our pizza is going to cost more than the average pizza?

ASK: Does anyone still think that you will ever see your $1000 investment back, let alone the $1 Million I promised?

EXPECT all participants to have put their hands down at this point.

DEBRIEF activity by telling participants that the pizza company in mind is Domino's Pizza.

ASK: What was the product that they provide that accounted for their phenomenal growth?

> **LEAD** discussion to: pizza *guaranteed* within 30 minutes or its free.

Domino's married a product; *pizza*, with a service; *guaranteed 30 minute delivery, or else it's free,* to distinguish themselves from the competition.

You can be sure that the founders of Domino's are very wealthy people today.

SUMMARIZE by stating: This is an example of excellent customer service.

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Customer Service Overview (CD ROM), Continued

Level of Service Dictates Quality of Service

LEAD discussion toward an understanding that the **level** of customer service is what **makes the difference**. Domino's didn't *promise* delivery in 30 minutes, they *guaranteed* it.

EMPHASIZE that a service supplier can choose to exceed a customer's expectations or just do the minimum necessary to meet expectations.

Company Efforts to Improve Customer Service

ASK participants for examples of companies where they have witnessed an effort to lift the standards of customer service.

BOARD the broad categories that apply to each example of improved customer service.

> **Example:** A participant may note that their bank has added another teller during peak hours. The related broad category would be *faster service.*

DISCUSS actions participants think they can take as a CSS that would further BellSouth's efforts to improve customer service.

BOARD participant ideas

> **LEARNING ADVISOR NOTE:** Keep this list visible throughout the course. Refer to it after presentation of the upcoming *48 Hours* video segment. Return to this list as appropriate as the course progresses.

ASK participants to keep items on list in mind as they move through the curriculum over the next couple of months and in particular as it may apply to problem solving activities.

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Customer Service Overview (CD ROM), Continued

Customer Service Is...

DISCUSS the fact that excellent customer service was first introduced in the Core Curriculum as a key competitive advantage.

EMPHASIZE that the reason excellent customer service is a key competitive advantage is because it *adds value* to our products and services. Added value is so very vital to distinguishing BellSouth's from our new competitors. For us, it truly is "a whole new world".

Excellent Customer Service Makes Good Business Sense

EXPLAIN that the loss of even 1 customer to competition is significant. This is why as a CSS you should follow the advise of the video and do whatever it takes (within reason) to satisfy the customer. In this manner each of us should approach problem management as a way to maintain BellSouth's competitive edge.

LEAD discussion which asks the following questions:

- **ASK** participants about good and bad customer service experiences.

  LEAD discussion to a differentiation of what made an experience "good" or "great".

- **ASK** participants why do they think BellSouth concentrates on customer service?

  LEAD discussion to the fact that concentrating on customer service makes good business sense.
  - Excellent customer service promotes loyalty.
  - Loyalty means loss of fewer customers to competition (and the revenue associated with each customer).
  - Loyal customers speak favorably about BellSouth, attracting customers from competition
  - Fewer lost customers leads to reduced advertising costs to regain customers.
  - Lower advertising costs increase company profits

TRANSITION to the introduction of the CD ROM by emphasizing that satisfying the customer is the only way to delivering excellent customer service. Explain that the material participants are about to see describes the not only satisfying a customer but going beyond satisfaction to exceeding expectations to create true loyalty.

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Customer Service Overview (CD ROM), Continued

What is Customer Service? - CD Topic 1.1

Introduction of CD ROM Technology

STATE: Now lets get inside the subject of customer service. The following information is being presented in a new format that many of you may not have seen before. We will be using the technology of CD ROM to present some of the material in this course. Use of new technology for the delivery of training is another way for BellSouth to maintain its competitive edge.

How to Instruct Using CD

LEARNING ADVISOR NOTE: Begin CBT course by clicking on the box to the left of the topic titled Topic 1.1: *"What is Customer Service?"* Using your mouse, follow the directions provided by the course.

Participants will see how customers react to different situations and how each situation is handled within the context of excellent customer service.

As you move through the CD pause where the course prompts to stop. Discuss the question(s) presented with participants, arriving at consensus prior to clicking on an answer.

Formally, *Products* Differentiated a Company

EXPLAIN that in the past, companies truly differentiated themselves with their products. As an example ask participants to compare the many different shapes and the accompanying bells and whistles of cars of the 50's compared to the relative uniformity of cars today. In today's information age, technology is duplicated so rapidly that most products are very much alike, regardless of the brand.

EXPLAIN that governmental regulations prohibit BellSouth from producing equipment or products. Almost all hardware is produced for us by other companies such as AT&T and Northern Telecom. These same equipment manufacturers are also supplying this same equipment to our competitors.

ASK: What can we do to stand out from our competition?

EXPECT: The way to distinguish products today is through providing a higher level of service than the competition in support of a product.

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Customer Service Overview (CD ROM)

Customer Service Overview

INDICATE to participants that we are going to explore the basis of your new position for the next several hours.

ASK participants their thoughts on "What is Customer Service?"

BOARD responses from participants

EXPECT:

- Understanding your Customer
- Building Rapport with Customer
- Establishing Trust with Customer

ASK: How have you seen customer service change over time?, Give examples from your experience.

LEAD discussion to

- Service seems to be a thing of the past
- I read about a new emphasis on customer service, but I don't see any evidence of it.
- I use to have a butcher who knew me, now I'm just a face in the crowd at Kroger.

EXPLAIN that customer service use to be quite different than what passes as "good" customer service today. Prior to World War II, customer service was highly regarded by both businesses and consumers alike.

In the boom years following World War II, customer service was not required to attract customers; as customer demand outstripped manufacturers' ability to produce, most companies reduced service, treating it as an unnecessary expense.

The past decade or so customer service has regained some of its value as a marketing tool. Companies are re-learning that customers who find value return again and again and again. Companies who realize the value of customer service are spending more time and effort to increase service levels.

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Customer Service Overview (CD ROM), Continued

What's Your Gripe?

INTRODUCE video by stating: As you are about to see, many companies are striving toward excellent customer service but few are yet achieving it.

STATE: As a service provider, watch the following, and think about how you would like your on-the-job performance to be compared to the service providers outlined in the video.

LEARNING ADVISOR NOTE: Begin showing video clip. Stop when prompted. Video length: 9:35

Why Should BellSouth Worry About Customer Service?

DEBRIEF video segment by initiating a discussion about customer service.

DEBRIEF video by polling the group,

ASK for short, three or four word responses to the following:

- As a customer, what impresses you the most?
- What prompts you to more often return to a particular store rather than "shop around"?

BOARD responses from participants

SUMMARIZE responses by pointing out that the participants' answers, like most other people today, prove that they are not always shopping for the lowest price, they are also looking for what provides the greatest *value*.

ASK: While we are speaking about value, what is the value of a Small business customer?

POLL participant answers.

STATE: A single Small Business customer has an unlimited lifetime value. A customer is worth far more than their monthly bill.

EXPLAIN that when BellSouth looses a customer, we loose much more than a monthly revenue stream, we also loose that customer's ability to "market" us through positive comments on our performance when we exceed their expectations.

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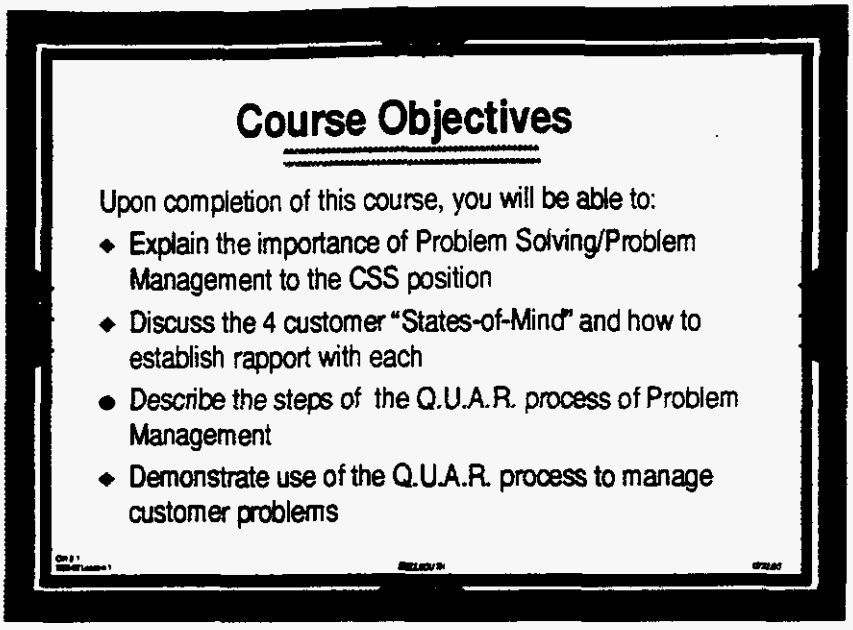
Defining Problem Management, Continued



ASK participants if there are any questions before moving forward to the first lesson.

Continued on next page

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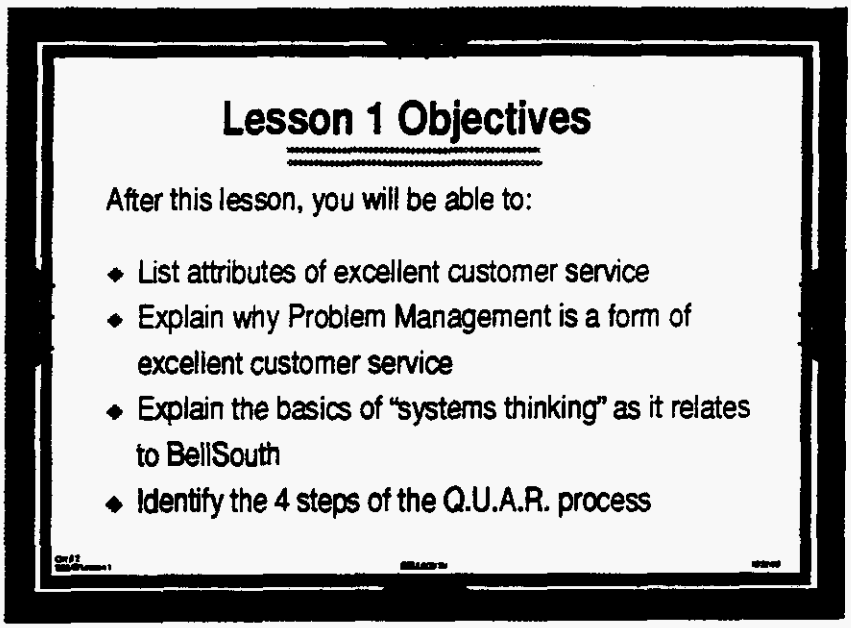
Defining Problem Management, Continued

Lesson Objectives

EXPLAIN that at the completion of this lesson, the participant will be able to:



LEARNING ADVISOR NOTE: After presentation of course objectives, place the LCD panel on the overhead projector in order to present the CD ROM lessons.

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Audience:	CSS Small Business Personnel
Assumptions:	Participants have completed the following courses: • Core Curriculum • Curriculum Introduction/Performance Measures • Overture Introductory courses
Instructor Materials	• CD ROM course "Exceeding your Customer's Expectations" • Problem Management Video tape - • Special deck of cards for lesson 8 role-plays • Overheads • Dominos • Flipchart or whiteboard • Markers
Participant Materials	Memo pads and pencils Handouts
Equipment Required	Computer with CD ROM Speakers for Computer LCD panel Overhead Projector VCR TV
Room Set Up	Position students close to the front of the room for maximum interaction with Learning Advisor. Provide additional seating in corners of room for groups of two to use for role-plays.
Preparation Steps	1. Instructor should have viewed CBT course Exceeding Your Customer's Expectations and video. 2. Read through all learning advisor and participant materials 3. Conduct a practice session of the lesson 8 role-play to establish confidence with logistics of the process 4. Set up dominos in an interesting pattern 5. Insert videotape "*How to Profit from Complaining Customers*" 6. Test video equipment

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Introduction to Problem Management

Defining Problem Management

What is Problem Management?

WELCOME participants to the Problem Management course.

INTRODUCE subject matter by leading a discussion on Problem Management. Explain that the course will examine two separate but related processes, problem management and problem solving.

ASK participants a series of questions, "What is Problem Solving?", "What is Problem Management?"

BOARD the answers.

EXPECT: Problem Solving

1. Resolving a problem
2. Finding a solution
3. Satisfying customers

Problem Management

1. Handling a problem
2. Resolving a problem
3. Passing the problem to another

FOLLOW-UP the conversation by asking "What is the difference between the two?"

LEAD discussion to a consensus that Problem Solving is a sub-set of the larger topic of Problem Management.(i.e., one way to manage a problem is to solve it, another way to manage a problem may be to pass it off to another for resolution).

Course Objectives

STATE: Now that we have introduced the subject matter for this course, please refer to the overhead so that we can review the objectives for the next few days.

Continued on next page

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What is Customer Service? - CD Topic 1.1
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Who is Your Customer? - CD Topic 1.3
Focusing on the Customer - CD Topic 1.4
Importance of Problem Management 15
Attributes of Excellent Customer Service 19
Making the Difference through Problem Management 20
Viewing Problem Solving as a System 25

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Lesson 1: Introduction to Problem Management

Learning Advisor Guide

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Problem Management

Learning Advisor Guide

SB042

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SB 803

L.A.G.

LEARNING ADVISOR FEEDBACK PROCESS

Overview

Feedback process

The Feedback Process serves as a guide for gathering and returning feedback regarding the Small Business Initial Training class. The feedback you gather will be input for a growth plan that the Learning Advisor, Participant, and Team Manager will build. It will also serve as a way to determine how well we are improving performance. This document is in two sections:

- Learning Advisor to the Branch office (Team Manager) feedback
- Learning Advisor to the Performance Improvement Department feedback

Objectives

Upon completion of this material you will:

- Understand the feedback process
- Know how to provide written feedback to a Team Manager and to the Performance Improvement Department

Material Needed

Pendaflex folders for drop files
Participant Questionnaire - Attachment A
Observation Worksheets - Attachment B
Checks for Understanding (CFU) Tracking Worksheet - Attachment C
Completed Checks for Understanding (CFU) on each participant
Growth Plan Worksheets - Attachment D
Examples - Attachment E

Advance Preparation

- Review this package in its entirety
- Set up drop files for each participant
- Make copies of the following:
  Participant Questionnaire - 2 copies for each participant.
  Observation Worksheets - 1 copy for each participant.
  CFU Tracking Worksheets - 1 copy for each participant.
  Completed CFU's for each participant - 1 copy.
  Growth Plan Worksheets - 1 copy for each participant.
- Schedule time throughout Initial Training to review feedback with Participant and Team Manager

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How does the process work?

Learning Advisor to Team Manager Feedback Process

This sections covers the feedback the Learning Advisors will provide to the Branch office (Team Manager). Please adhere to the process as outlined in the matrix. The feedback you gather will be input for a growth plan that the Learning Advisor, Participant, and Team Manager will build.. It will also serve as a way to determine how well we are improving performance.

Who is involved?	What do I do?
Learning Advisor	Advise the participants that throughout their Initial Training class that Checks for Understanding and Observations will be performed to assist in developing a growth or developmental plan for each participant. This growth plan will be discussed with each participant and their Team Manager in detail.
Participant & Learning Advisor	Upon completion of each Check for Understanding and role-play/on-job session, time should be scheduled to review feedback with the Participant. During these reviews the Learning Advisor should communicate his/her observations regarding the participants progress.
Team Manager & Learning Advisor	Provide written feedback to Team Manager upon completion of each on-job session and practice week. During these reviews the Learning Advisor should communicate his/her observations regarding the participants progress. The Growth Plan should be completed to hand off to the Team Manager during practice week.

Learning Advisor to Performance Improvement Feedback Process

This sections covers the feedback the Learning Advisors will provide to the Performance Improvement Manager Please adhere to the process as outlined in the matrix. The feedback you gather will be input for the PI Manager, Delivery manager, HPT and Centralized Course Development Group. It will also serve as a way to determine how well we are improving performance.

Who is involved?	What do I do?
Learning Advisor	Provide copies of the Participant Questionnaire to each participant upon completion of the CORE and BAS/CSS curriculum paths. Maintain copies of the completed Participant Questionnaires, Observation Worksheets, completed CFU's, CFU's Tracking Worksheets and Growth Plan Worksheets.

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Materials

Materials

The following table provides you with information on what materials you need, when to use this material and who to return it to. Copies of this material can be found in Appendix A.

What do I need	What do I do:	Where does this go:
Drop Files	At the beginning of class, set up a drop file for each participant. As class progresses, this file will contain the Checks for Understanding, CFU Tracking Worksheet, and Observation Worksheets.	If the Learning Advisor should change during IT class, pass along all drop files to new Learning Advisor.
Participant Questionnaire	Upon completion of the CORE and BAS/CSS curricula, distribute one to each participant. Be sure you have completed the Learning Advisor Name, Class start date and type of class. Collect and keep them organized by start date/class type..	Bill Harris 1447 NE Expressway Rm 321C Atlanta, GA 30329
Observation Worksheet	During a role-play/on-job session document your observations, review with participant and place in participants drop file. A minimum of 2 role-play observations should be completed on each participant after the first on-job session and in Practice Week. (The first on-job session is for listening) A total of 10 observations should be completed on each participant throughout their Initial Training Class.	Upon completion: Original Worksheet to Team Manager 1 copy to Bill Harris 1447 NE Expressway Rm 321C Atlanta, GA 30329

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Materials (con't)

What do I need	What do I do:	Where does this go:
Checks For Understanding (Located throughout the Initial Training Material)	Upon completion of each Check for Understanding (CFU), review with participant, collect CFU, record information on CFU Tracking Worksheet and place in participants drop file.	Upon completion: Original Worksheet to Team Manager 1 copy to Bill Harris 1447 NE Expressway Rm 321C Atlanta, GA 30329
CFU Tracking Worksheet	Upon completion of each CFU, transfer the participants results to the appropriate block on the Tracking Worksheet. Keep them organized by participant.	Upon completion: Original Worksheet to Team Manager 1 copy to Bill Harris 1447 NE Expressway Rm 321C Atlanta, GA 30329
Growth Plan	Upon completion of the Initial Training curriculum complete the Growth Plan worksheets. Schedule time with the Participant, Team Manager and Branch Manager to review.	Upon completion: Original Worksheet to Team Manager 1 copy to Bill Harris 1447 NE Expressway Rm 321C Atlanta, GA 30329

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Attachment A

Small Business Initial Training
Participant Questionnaire

Participants Name: _____

Previous Job Title: _____

Office Telephone Number: _____

Supervisors Name: _____

Supervisors Telephone Number: _____

How long have you been with the company? _____

How long were you in your previous job title? _____

Learning Advisor Name:

Class start date:

Please circle type of class:

CORE BAS/DOE BAS/SONGS CSS/DOE CSS/SONGS

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Attachment A

Small Business Initial Training
Participant Questionnaire

Your thoughtful completion of this questionnaire will help us to further our knowledge and ensure continued positive training results. for each of the following items, please select the statement that best represents your response. Thank you.

1. Were the training activities reflective of "real world" tasks and on-the-job situations?
   - ❑ Very Much So
   - ❑ For the Most Part
   - ❑ Some What
   - ❑ Only Slightly
   - ❑ Not at All
   - If not, why? _____

2. Did you have sufficient opportunity during the course to effectively practice or apply the information/concepts presented?
   - ❑ Very Much So
   - ❑ For the Most Part
   - ❑ Some What
   - ❑ Only Slightly
   - ❑ Not at All

3. Were you sufficiently challenged by the practice activities?
   - ❑ Very Much So
   - ❑ For the Most Part
   - ❑ Some What
   - ❑ Only Slightly
   - ❑ Not at All

4. Did you feel that the instructor enhanced your learning?
   - ❑ Very Much So
   - ❑ For the Most Part
   - ❑ Some What
   - ❑ Only Slightly
   - ❑ Not at All

5. What kinds of problems did the instructor help you work through during the practice activities?

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Attachment A
Participant Questionnaire (con't)

6. Overall, in what areas do you feel you have gained the most knowledge from participating in this training?

7. In terms of preparing you to do your job better, how would you rate the overall quality of Initial Training?
❑ Excellent ❑ Good ❑ Fair ❑ Marginal ❑ Poor

8. How would you rate the instructor/s overall effectiveness?
❑ Excellent ❑ Good ❑ Fair ❑ Marginal ❑ Poor

9. Were the following resources helpful to your learning?

	Not at All	Only Slightly	Somewhat	For the most part	Very much so
❑ Participant Materials	1	2	3	4	5
❑ Videos	1	2	3	4	5
❑ Role-plays/Exercises	1	2	3	4	5
❑ Instructor Feedback	1	2	3	4	5
❑ Check for Understanding Debriefs	1	2	3	4	5

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Attachment B

Observation Worksheets
Business Application Specialist

Employee Name:

	Consultative Sales
	Knowledge of characteristics of Small Business • Exhibits a general understanding of trends and issues that impact the small business and is beginning to seek out information to help them provide customers with targeted, customized telecommunications solutions.
	Identifies customer needs • Reviews available information on every contact in customer records (e.g. toll usage, current products and services used) in order to identify potential leads. • Recognizes common customer cues (e.g. phone ringing in background, mention of expansion) to determine potential needs. Will then follow-up with open-ended questions and prompt purchase decision and ask for sale. • Uses available job aids to ask appropriate, open-ended questions to identify customer needs.
	Matches products to need • Recommends products and services or multiple products and services to satisfy the most common customer needs. Uses available resources and job aids as required to make product recommendations. • Communicates benefits and uses available resources to determine limitations resulting from combination of services for all Small Business products.
	Overcome objections • Attempts to overcome common objections by identifying source of objection and prompting the customer to think about the cost of not obtaining the service.
	Closes a sale • Identifies probability for successful sale and proceeds accordingly by either asking for the sale or abandoning the consultative process.
	Knowledge of products • Exhibits a good understanding of the operation and application of BellSouth products and services and helps the customer to evaluate these within a small business context. Is able to answer questions posed by the customer about these products/services.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	Consultative Sales
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by consultative sales skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	Problem Solving
	Manages time effectively • Prioritizes common tasks to aid with time management.
	Identifies customer concerns • Identifies common customer problems as they relate to small business telecommunication needs.
	Multitasks • Interfaces with system, customer, available resources and other BST departments to provide service.
	Makes customer focused decisions • Exhibits great effort in establishing a consultative relationship with customers by attempting to understand individual needs and provides customer-specific solutions.
	Knowledge of BST policy & procedure • Has basic knowledge of common policies that impact day-to-day work. Knows where to locate and utilize additional resources to ensure compliance with all BST Small Business policies and procedures.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	Problem Solving
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B — Observation Worksheet/BAS

Employee Name:

	Communication Skills
	Communicates clearly • Summarizes decisions made and actions to be taken at end of call.
	Communicates using appropriate tone of voice • Uses a professional, friendly tone of voice.
	Actively listens • Clarifies customer responses or requests to minimize miscommunication.
	Satisfies irate customers • Is able to diffuse irate customers by expressing empathy, identifying the problem and following through until satisfactory resolution.
	Communicates using customer appropriate terminology • Explains the operation and application of products and services to customers so that the customer feels able to make full use of the product's or service's features for maximum benefit. Knows where to find additional information to aid with this.
	Relates to a range of customer personalities • Recognizes and adapts to common customer personalities by listening to tone of voice, rate of speech, etc. Uses this information to communicate efficiently and effectively within the context of the specific customer contact.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	Communication Skills
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	Total Customer Satisfaction
	Recognizes self as the direct link between Small Business and the customer. • Recognizes the importance of participating in team meetings and communicating upward successes or failures of initiatives for the purpose of continual improvement.
	Goes to great length to satisfy customer • Views customer service orientation as important and recognizes customer service as Small Business' competitive edge.
	Knowledge of telecommunications industry • Appreciates the competitive threat and seeks out information on trends and issues in the telecommunications industry beyond BST. Is beginning to think of ways to combat impending threat within their immediate sphere of influence.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	Total Customer Satisfaction
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	System Skills
	Enters data accurately • Has good inputting skills and reviews orders for errors before generating. Is able to move from screen to screen without unduly delaying the customer.
	Uses system features that maximize satisfaction of customer needs • Efficiently uses all tools provided by the system, such as E-mail, multiple windows, fax and On-Line Documentation.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/BAS**

Employee Name:

	System Skills
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B

Observation Worksheet
Customer Support Specialist

Employee Name:

	Lead Generation
	Ask appropriate open-ended questions • Recognizes the customer cues (e.g. phone ringing in background, mention of expansion or relocation) to determine potential needs. Follow up with open-ended questions to bring potential needs to customer's attention and prompt action.
	Knowledge of characteristics of a small business • Exhibits a general understanding of trends and issues that impact the small business and is beginning to seek out information to help them provide context for viable leads.
	Knowledge of products • Correctly answers the most frequently asked questions posed by customers about products and services and identifies common incompatibility problems between customer's existing hardware and BellSouth products and services. Uses job aids.
	Appropriate transfer of calls to BAS • Transfer customer to BAS after uncovering need by remaining on-line to inform BAS of need and introduce customer.
	Use of available resources • Review available information on every contact in customer records in order to identify potential leads.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Lead Generation
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 5 Week 7 Week 8 Practice Week

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Problem Management
	Multi tasks • Interfaces with system, customer, available resources and other BST departments to provide problem resolution.
	Makes customer focused decisions • Empathizes with customer and facilitates problem resolution by serving as single point of contact. Communicates customer problems to other departments and follows up to ensure resolution.
	Manages time effectively • Prioritizes common tasks to aid with time management.
	Identifies customer concerns • Identifies common customer problems and transfers to other departments when appropriate, or consults available resources to provide customer a response.
	Determines appropriate party or action in order to manage a customer problem • Serves as a single point of contact for customer in problem resolution. Communicates customer problem to other departments to ensure successful problem resolution.
	Knowledge of BST policy & procedure • Has basic knowledge of common policies that impact day-to-day work. Knows where to locate and utilize additional resources to ensure compliance with all BST Small Business policies and procedures.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Problem Management
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Communication Skills
	Communicates clearly • Summarizes decisions made and actions to be taken at end of call.
	Communicates using appropriate tone of voice • Uses a professional, friendly tone of voice.
	Actively listens • Clarifies customer responses or requests to minimize miscommunication.
	Satisfies irate customers • Is able to diffuse irate customers by expressing empathy, identifying the problem and following through until satisfactory resolution.
	Communicates using customer appropriate terminology • Explains the operation and application of products and services to customers so that the customer feels able to make full use of the product's or service's features for maximum benefit. Knows where to find additional information to aid with this.
	Relates to a range of customer personalities • Recognizes and adapts to common customer personalities by listening to tone of voice, rate of speech, etc. Uses this information to communicate efficiently and effectively within the context of the specific customer contact.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Communication Skills
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Total Customer Satisfaction
	Recognizes self as the direct link between Small Business and the customer. • Recognizes the importance of participating in team meetings and communicating upward successes or failures of initiatives for the purpose of continual improvement.
	Goes to great length to satisfy customer • Views customer service orientation as important and recognizes customer service as Small Business' competitive edge.
	Knowledge of telecommunications industry • Appreciates the competitive threat and seeks out information on trends and issues in the telecommunications industry beyond BST. Is beginning to think of ways to combat impending threat within their immediate sphere of influence.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	Total Customer Satisfaction Orientation
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	System Skills
	Enters data accurately • Has good inputting skills and reviews orders for errors before generating. Is able to move from screen to screen without unduly delaying the customer.
	Uses system features that maximize satisfaction of customer needs • Efficiently uses all tools provided by the system, such as E-mail, multiple windows, fax and On-Line Documentation.
	Provide specific observation Week 3

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Attachment B **Observation Worksheet/CSS**

Employee Name:

	System Skills
	Provide specific observation Week 5 Week 7 Week 8 Practice Week
	Breakdown CFU's by skill sets Week 3 Week 8 Week 5 Practice Week Week 7

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Attachment C

SB950 BAS/DOE Tracking Worksheet

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB036			
SB037			
SB038			
SB527	1		
	2		
	3		
	4		
	5		
	6		
SB039	1		
	2		
	3		
SB040			
SB044			
SB004			
SB005			
SB006			
SB007			
SB008			
SB041	1		
	2		
SB100	1		
SB041	3		
	4		

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Attachment C **SB950 BAS/DOE Tracking Worksheet**

Name:

Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB300S	1		
	2		
SB305S	1		
	2		
	3		
	4		
	5		
	6		
	7-HO1		
CS431	15		
SB728			
SB305S	8		
	7 HO2		
SB305S	9		
	10		
	11		
	12		
	13		
	14		
SB043			
SB501S			
SB340			
SB110			
SB510			

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Attachment C **SB950 BAS/DOE Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB502			
SB310S			
SB503			
SB315S			
SB725			
SB115			
SB330S			
SB314S			
SB504S			
SB505			
SB514			
SB517			
Practice Week			

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Attachment C **SB951 BAS/SONGS Tracking Worksheet**

Name:

Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB036			
SB037			
SB038			
SB527	1		
	2		
	3		
	4		
	5		
	6		
SB039	1		
	2		
	3		
SB040			
SB044			
SB004			
SB005			
SB006			
SB007			
SB008			
SB041	1		
	2		
SB100	1		
SB041	3		
	4		

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Attachment C **SB951 BAS/SONGS Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	*Comments*
SB300C	1		
	2		
SB305C	1		
	2		
	3		
	4		
SB305C	5		
	6		
	7-HO1		
CS431	14.5		
SB728			
SB305C	8		
SB305C	9		
	10		
	11		
	12		
	13		
SB043			
SB501C			
SB340			
SB110			
SB510			
SB502			
SB310C			

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Attachment C **SB951 BAS/SONGS Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB503			
SB315C			
SB725			
SB115			
SB330C			
SB320C			
SB504C			
SB505			
SB514			
SB517			
Practice Week			

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Attachment C **SB952 CSS/DOE Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB036			
SB037			
SB038			
SB527	1		
	2		
	3		
	4		
	5		
	6		
SB039	1		
	2		
	3		
SB040			
SB044			
SB004			
SB005			
SB006			
SB007			
SB008			
SB042			
SB041	1		
	2		
	3		
	4		

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Attachment C **SB952 CSS/DOE Tracking Worksheet**

Name:

Course #	Lesson #	# Questions Answered Wrong/Right	*Comments*
SB100	1		
	2		
	3		
	4		
	5		
	6		
	7		
SB105			
SB300S	1		
	2		
SB305S	1		
	2		
	3		
	4		
	5		
	6		
	7-HO1		
CS431	15		
SB305S	8		
	7 HO2		
SB305S	9		
	10		
	11		
	12		

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Attachment C **SB952 CSS/DOE Tracking Worksheet**

Name:

Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB305S	13		
	14		
SB314S			
SB043			
SB501S			
SB340			
SB110			
SB510			
SB502			
SB310S			
SB503			
SB315S			
SB725			
SB115			
SB150			
SB155			
SB160			
SB330S			
SB140	1		
	2		
	3		
SB504S			
SB505			
SB514			

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Attachment C **SB952 CSS/DOE Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB517			
SB335			
SB507			
Practice Week			

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Attachment C **SB953 CSS/SONGS Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB036			
SB037			
SB038			
SB527	1		
	2		
	3		
	4		
	5		
	6		
SB039	1		
	2		
	3		
SB040			
SB044			
SB004			
SB005			
SB006			
SB007			
SB008			
SB042			
SB041	1		
	2		
	3		
	4		
SB100	1		

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Attachment C **SB953 CSS/SONGS Tracking Worksheet**

Name:

Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB100	2		
	3		
	4		
	5		
	6		
	7		
SB105			
SB300C	1		
	2		
SB305C	1		
	2		
	3		
	4		
	5		
	6		
	7-HO1		
CS431	14.5		
SB305C	8		
	9		
	10		
	11		
	12		
	13		
SB320C			

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Attachment C **SB953 CSS/SONGS Tracking Worksheet**

Name:

Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB043			
SB501C			
SB340			
SB110			
SB510			
SB502			
SB310C			
SB503			
SB315C			
SB725			
SB115			
SB150			
SB155			
SB160			
SB330C			
SB140	1		
	2		
	3		
SB504C			
SB505			
SB165C			
SB514			
SB517			
SB335			

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Attachment C **SB953 CSS/SONGS Tracking Worksheet**

Name:			
Course #	Lesson #	# Questions Answered Wrong/Right	Comments
SB507			
Practice Week			

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Attachment D

Growth Plan Worksheets

Employee Name:

Strengths	Areas Moved From Growth To Strength

JOINT GROWTH PLAN

Date	Areas Targeted for Growth	Action Plan	Emp	Coach	F/U Date	Comp Date	Success Measures Target Date	Actual Results Achieved Date

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Attachment D

JOINT GROWTH PLAN

Employee Name:

Date	Areas Targeted for Growth	Action Plan	Emp	Coach	F/U Date	Comp Date	Success Measures Target Date	Actual Results Achieved Date

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Attachment D

Employee Name:

Strengths	Areas Moved From Growth To Strength

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Attachment E-Example of completed Observation Worksheet (Week 3)

Employee Name: Mary Smith

	Consultative Sales
✔	Knowledge of characteristics of Small Business ★ Exhibits a general understanding of trends and issues that impact the small business and is beginning to seek out information to help them provide customers with targeted, customized telecommunications solutions.
✘	Identifies customer needs ☒ Reviews available information on every contact in customer records (e.g. toll usage, current products and services used) in order to identify potential leads. ☒ Recognizes common customer cues (e.g. phone ringing in background, mention of expansion) to determine potential needs. Will then follow-up with open-ended questions and prompt purchase decision and ask for sale. ★ Uses available job aids to ask appropriate, open-ended questions to identify customer needs.
✘	Matches products to need ★ Recommends products and services or multiple products and services to satisfy the most common customer needs. Uses available resources and job aids as required to make product recommendations. ☒ Communicates benefits and uses available resources to determine limitations resulting from combination of services for all Small Business products.
✘	Overcome objections ☒ Attempts to overcome common objections by identifying source of objection and prompting the customer to think about the cost of not obtaining the service.
✘	Closes a sale ☒ Identifies probability for successful sale and proceeds accordingly by either asking for the sale or abandoning the consultative process.
✘	Knowledge of products ☒ Exhibits a good understanding of the operation and application of BellSouth products and services and helps the customer to evaluate these within a small business context. Is able to answer questions posed by the customer about these products/services.
	Provide specific observation Week 3 ***While taking calls on the desk, Mary encountered a customer calling in who wanted to disconnect one line in order to reduce expenses. She demonstrated a general understanding of the trends and iuuses facing this business by asking about his customers (value, where located, how many, how/why do they contact this business, etc.). Mary made a recommendation not to disconnect the line based on the prbability of losing customers and the associated sales revenue without fully developing the necessary supporting information. Had she listened to the customer's phones ringing in the background, she could have asked about adequate staffing to answer calls. Consequently, when she made the recommendation, the customer objected about not being able to handle all calls and Mary was taken off-guard. After the call, we discussed how keeping the line and adding Memorycall would allow the customer to handle his customers calls without additional staff and could retain the sales revenues. This was her first call and was quick to understand how to further develop the application. More practice in datagathering should alleviate the problems encountered.***

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Attachment E-Example of completed Observation Worksheet (Week 5)

	Consultative Sales
✔	Knowledge of characteristics of Small Business ★ Exhibits a general understanding of trends and issues that impact the small business and is beginning to seek out information to help them provide customers with targeted, customized telecommunications solutions.
✔	Identifies customer needs ★ Reviews available information on every contact in customer records (e.g. toll usage, current products and services used) in order to identify potential leads. ★ Recognizes common customer cues (e.g. phone ringing in background, mention of expansion) to determine potential needs. Will then follow-up with open-ended questions and prompt purchase decision and ask for sale. ★ Uses available job aids to ask appropriate, open-ended questions to identify customer needs.
✔	Matches products to need ★ Recommends products and services or multiple products and services to satisfy the most common customer needs. Uses available resources and job aids as required to make product recommendations. ★ Communicates benefits and uses available resources to determine limitations resulting from combination of services for all Small Business products.
✔	Overcome objections ★ Attempts to overcome common objections by identifying source of objection and prompting the customer to think about the cost of not obtaining the service.
✔	Closes a sale ★ Identifies probability for successful sale and proceeds accordingly by either asking for the sale or abandoning the consultative process.
✘	Knowledge of products ☒ Exhibits a good understanding of the operation and application of BellSouth products and services and helps the customer to evaluate these within a small business context. Is able to answer questions posed by the customer about these products/services.
	Provide specific observation Week 3 ***While taking calls on the desk, Mary encountered a customer calling in who wanted to disconnect one line in order to reduce expenses. She demonstrated a general understanding of the trends and iuuses facing this business by asking about his customers (value, where located, how many, how/why do they contact this business, etc.). Mary made a recommendation not to disconnect the line based on the prbability of losing customers and the associated sales revenue without fully developing the necessary supporting information. Had she listened to the customer's phones ringing in the background, she could have asked about adequate staffing to answer calls. Consequently, when she made the recommendation, the customer objected about not being able to handle all calls and Mary was taken off-guard. After the call, we discussed how keeping the line and adding Memorycall would allow the customer to handle his customers calls without additional staff and could retain the sales revenues. This was her first call and was quick to understand how to further develop the application. More practice in datagathering should alleviate the problems encountered.***

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Attachment E-Example of completed Observation Worksheet (Week 5)

	Consultative Sales
	Provide specific observation Week 5 ***Mary's datagathering has greatly improved. Her customer (HVAC for commercial) called in with the request for an additional line. Mary inquired as to why the customer felt he needed another line; it was due to increasing marketshare. She further asked about his existing and new customers, including locations. Her customer stated he was beginning to pickup new business in Macon. After determining one of the factors which attracts his customers is his speed of response to service calls, Mary recommended Remote Call Forwarding to promote a local presence and enhance his positioning of fast response. Mary coupled this recommendation with SaverService in order to help him control the long distance growth he has experienced in the past three months and will continue to experience with this expanded market. Because of her excellent datagathering, Mary avoided any objections from the customer. She closed the sale which started as an additional 1FB and she included RCF and SaverService. Mary could not recall if the customer could handle more than one call at a time with the RCF, commited to the customer to call him back with the information. While I would have liked for her to know this information, she did consult On-line Doc after the call, realized he could handle only one call, notified the customer and added an additional access path for the call volume.*** Week 7 Week 8 Practice Week
	Breakdown CFU's by consultative sales skill sets Week 3 Answered 6 of 7 correct Week 8 Week 5 Answered 20 of 23 correct Practice Week Week 7

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Attachment E-Example of completed Growth Plan

Growth Plan Worksheets

Employee Name:

Strengths	Areas Moved From Growth To Strength
• Relating and conversational skills • Good working knowledge of the systems • Working well with other people, strong team player • Very customer-focused	

JOINT GROWTH PLAN

Date	Areas Targeted for Growth	Action Plan	Emp	Coach	F/U Date	Comp Date	Success Measures Target Date	Actual Results Achieved Date
03/15	Increase sales revenues	Attend "You Can Take the Lead" ongoing training. Identify and incorporate 1-2 new sales techniques.	X	X	04/30			
	Shorten contact time	Attend "You Can Take the Lead" ongoing training. Identify and incorporate 1-2 ways to take the lead which will allow you to complete contact while customer is on the line	X	X	04/30			
	Error Accuracy	Work with the interface specialist to identify andimprove order accuracy	X	X	04/30			

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LA.

Ky.

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Optional Calling Plans-KY SB504

Learning Advisor Guide
Issue 1 - October 1996

PERFORMANCE IMPROVEMENT

Optional Calling Plans

SB504

Learning Advisor Guide

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Optional Calling Plans - Kentucky

Objectives

At the end of this lesson, the students will be able to:

- Explain Optional Calling Plans.
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service.

Advance Preparation

The following advance preparations will be necessary for class:

- Select live accounts with IntraLATA calls for students to use during terminal practice.
- Study this training material and be familiar with OCPs.
- Make overheads of the objectives and plans (available in the Presentation Aids section of this LAG).
- Create an order for each type of service to be used as a guide for you during student practice.

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Supplies and Materials

You will need the following materials listed below:

- Handbook./OLD
- Overhead projector
- Optional - Operating Standards and Tariffs

Students need to bring the following to class:

- OCP section of their Handbook
- Memo pads and pencils

Note to Learning Advisor

This lesson is divided into two handouts to give the specialist a better understanding of the Optional Calling Plans available to small business customers. Your interaction to enhance the learning of the student is very important.

Lead the students through the screens and make sure they understand how these screens help them understand customers' need and advise customers which optional calling plan will best suit the needs of their business.

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Introduction

In your own words, using the overheads you've prepared, explain to the students that our business customers have a choice of several optional calling plans and review the objectives of this lesson.

Practice

At the end of each handout, instruct the students to sign on to the system if they have not already done so.

- Give them the preselected telephone numbers and direct them to analyze the account and issue orders for appropriate plan.
- After the students input the orders, check for accuracy.
- Make sure the orders are canceled.

Business Only

There is no reference in this lesson to residence, trunks or NARs since small business most likely will not be involved with these orders.

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Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Kentucky.

Introduction

Optional Calling Plans (OCPs) are specifically designed toll plans applicable during specified periods.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Optional Calling Plans Available in Kentucky

The following is a list of plans with associated descriptions.

Plan	Description
One-Way Measured Point-To-Point Calling	This plan provides for measured calling from one exchange to another outside the local calling area, but within the same LATA. The plan is furnished only on dial station-to-station calls originating one-way outward from the OCP subscriber's telephone to telephones in the prescribed terminating exchange. The plan applies to all hours seven days per week for business customers.
Optional Extended Area Service (OEAS)	This plan provides optional measured calling on customer-dialed station-to-station calls to or from locations outside local calling area, but within the same LATA for specified exchange. OEAS was offered on an experimental basis only to those subscribers in the Lebanon Junction originating exchange.
One-Way Measured Extended Community Calling	This plan is furnished only on dialed station-to-station calls originating one-way outward from the OCP subscriber's telephone to telephones in the prescribed terminating exchanges on area.
Two-Way Measured Extended Community Calling	This service is furnished only on: - dialed station-to-station calls originating one-way outward from the OCP subscriber's telephone to telephones in the prescribed terminating exchange or exchanges within the same LATA. - all dialed station-to-station calls in the reverse direction originated by any telephone in the terminating exchange or exchanges within the same LATA and completed as an outgoing call to the telephone of the subscriber of the OCP. Usage time on calls in both directions will be accumulated and the total time determined will apply as total usage for the month in which billed.

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Restrictions

Following is a list of restrictions applicable to these Optional Calling Plans.

- These plans are subject to availability of facilities and billing capability as determined by the company.
- A customer may not subscribe to both a two-way plan and a one-way plan to the same terminating exchange during the same billing month.
- Individual message detail is not included as a part of the service.
- A customer may not subscribe to more than one OCP that covers the same time period and geographical area.

Minimum Contract Period

The minimum contract period is one month.

Note: A longer period applies when a two-way subscriber has a foreign listing printed in the distant directory which indicates no charge applies for direct-dialed calls to his number.

Non-Recurring Charges

The following non-recurring charges may apply:

- There is a Service Ordering Charge that applies when the service is ordered and no central office work is required.
- When central office work is required to implement an Optional Calling Plan, a Central Office Line Connection charge will apply as appropriate.

USOCs, Rates, etc.

USOCs, rates, etc., may be found in your Handbook or OLD.

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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

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Saver Service	Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are: • Budgeting Plan (Business) • Aggregate Plan
Availability & Offering	This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.
Budgeting Plan (Business)	
Definition	The Budgeting Plan provides for direct-dialed calling to the telephone of the subscriber of the plan.
Billing	With this plan, a customer may use up to the initial block of time of toll calling per account for a fixed monthly rate. Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

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Options

Below is a table listing the options available under the Budgeting Plan with their descriptions, USOCs and an example:

Option	Description	USOC	Example
1	120-minute (2 hr) minimum, per account	OSW02	I1 OSW02/TZ 00, XX-XX-XX (due date)
2	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TZ 00, XX-XX-XX (due date)
3	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TZ 00, XX-XX-XX (due date)
4	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TZ 00, XX-XX-XX (due date)
5	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TZ 00, XX-XX-XX (due date)
6	6,600-minute (110 hr) minimum, per account	OSW11	I1 OSW11/TZ 00, XX-XX-XX (due date)

Restrictions

Partial billed to numbers (BTNs) are not eligible for the service.

Full BTNs of accounts will be billed in the same RAO.

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Aggregated Plan

Aggregated Plan

The Aggregated Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	then . . .
250 hours or more	refer them to Premis Marketing!
Less than 250 hours	discuss with them one of the options in the Plan

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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Presentation Aids

Objectives

At the end of this lesson, the student will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan to the customer
- Issue orders to add service or change existing service

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Plans Available in Kentucky

Following is a list of plans currently offered in Kentucky

- One-Way Measured Point-to-Point Calling
- Optional Extended Area Service (OEAS)
- One-Way Measured Extended Community Calling
- Two-Way Measured Extended Community Calling
- Saver Service

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ROLE PLAYS

FOR

OPTIONAL CALLING PLANS

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FOR ALL STATES

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ROLE PLAY

Scenario

CUSTOMER CALLS FOR AN EXPLANATION OF CHARGES ON BILL.

Three Role Play Activities

1. LA acts as Specialist to model behavior, student is customer
2. Students act as customer and Specialist
3. Customer and Specialist change roles

Preparation

Select three (3) live accounts for students to analyze billing. These accounts do not have to fit any special profile for Optional Calling Plans as the focus is on analyzing the account billing.

Make copies of the Bill and Items screens to be used by the student/customer.

Debrief

Debrief after each activity

Were the customer's questions answered?

Was there an opportunity for selling a plan?

If no - Why not?

If yes - what plan and why would it fit the customer's needs.

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First Role Play
Activity 1

Gather students around a terminal, explain that you will be acting as the Specialist and ask for a volunteer to act as the first customer.

Give the customer a copy of a **BILL** and **ITEM** screens to read from.

Ask the remaining students to observe. Remind them that you will conduct a debrief when the exercise is completed.

Conduct the Exercise

Start the exercise as you see fit. (Ring Ring... announce self)

Customer: "This is (*Mr.Ms.Mrs. read from bill copy*)_____, and I would like some help figuring out my bill."

Specialist: Questions customer:
Access account in BOCRIS.
Analyzes bill and explains charges.

Debrief

Ask students

were customer's questions answered?

Was there an opportunity to sell a plan?
If no, why not.
If yes, what plan would best fit the customer's needs?

What went well?

What needs to be improved?

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Role Play

For these two activities form students into pairs. Have one act as the customer the other as the Specialist. Student/customers should be logged off.

Activity 2	Provide the student/customer with an account bill and instruct the groups to begin. Monitor progress and assist as required.
Debrief	Debrief session. Use questions from first activity.
Activity 3	Reverse roles and provide the student/customer with the third account bill.
Debrief	When complete conduct a debriefing session using the questions from the first activity.

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Suggested Scenarios for Additional Roleplays *Note

Scenario 1 Customer calls to request information on optional calling plans, for their business account. Customer is very distracted and wants only basic information.

Scenario 2 Customer calls and wants to disconnect Optional Calling service from their business service. Before customer disconnects the service they would like to know the cost difference they may notice. Using the previous months bill, provide customer this information.

Scenario 3 Customer calls and wants an explanation of the Optional Calling plans currently on their business account. They were not sure from the original installation what they had so they will need a very basic explanation. Customer is very irritable.

Scenario 4 Customer wants to add Optional Calling plans to all business lines but would like them to be billed separately. Customer is in a big hurry.

*Use live accounts.

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

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CHECKS FOR UNDERSTANDING

OPTIONAL CALLING PLANS

Instructions

Distribute the check for understanding.

Ask students to complete and turn in.

Review results with each student separately. Place in student file.

You may want to conduct a debrief of the Check for Understanding if students have any questions.

Following is the LA version with answers.

Checks for Understanding
Optional Calling Plans.

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

ANS: TW, then depress PF/F2

2. If you need to determine exchanges in the Local Calling area what screen would you access?

ANS: BAMS screen, by entering BAMS on the command line and depressing PF/F7.

What information does this screen provide?

ANS:
1. Available Plans
2. Calling Bands
3. First minute charges
4. Additional minute charges
5. Local or Toll
6. City
7. NPA and NXX.

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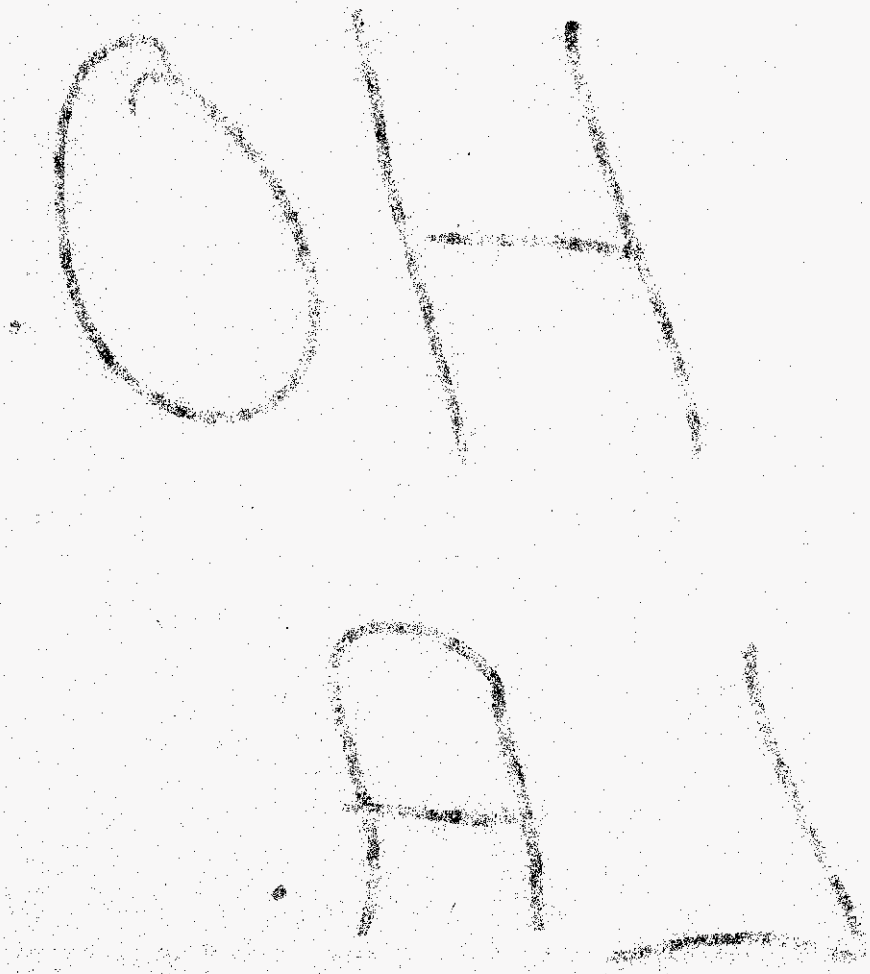

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Optional Calling Plans-LA SB504

Student Handout
Issue 1 - October 1996

PERFORMANCE IMPROVEMENT

Optional Calling Plans

SB504

Student Handout

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Optional Calling Plans - Louisiana

Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Louisiana.

Introduction

Optional Calling Plans (OCPs) are specifically designed intercity calling plans applicable to intrastate intraLATA Dial Station-to-Station long distance calls placed during a specified service period.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Optional Calling Plans Available in Louisiana

Below is a table listing the Calling Plans available to LA customers along with a description for each.

Plan	Description
One-Way Measured Circle Calling	This plan applies to all customer-dialed (DDD) calls to exchanges beyond the customer's Expanded Local Calling Area, less than or equal to 55 miles. The plan includes toll calls originating at any hour, outward from the OCP subscriber's telephone to any exchange within the mileage distance specified by the plan. It is a 25-hour, seven-days-a-week plan. Note: Customers are billed a flat rate for the first 1/2 hour and billed usage charges for each 1/10 (6 min.) hour after that..
Two-Way Measured Circle Calling	This plan applies to all customer-dialed (DDD) calls originating and/or terminating from exchanges; beyond customer's Expanded Local Calling area. The plan includes all toll calls originating at any hour, outward from the OCP subscriber's telephone to any exchange within the mileage distance equal to or less than 55 miles to the OCP subscriber. Note: usage time on calls in both directions will be accumulated and the total time determined will apply as total usage for the month in which billed.
LATA-Wide Reverse Billing	This plan applies to Basic Local Calling Area and Expanded Local Calling Area and all IntraLATA customer-dialed (DDD) calls which terminate at the subscriber's number. Calls are billed to the subscriber at the normal rates and discounts for station-to-station DDD calls instead of higher collect call rates. There are no specific time periods. Note: A separate "C" order is required to establish the OCP and an SB entry is needed in the Bill section. Example: --- BILL ISB LATA-Wide Reverse Billing IEBD XX-XX-XX
Shreveport Metropolitan Calling Plan	This plan provides seven-digit calling from Shreveport and Blanchard to Oil City & Mooringsport to Shreveport and Blanchard. It is provided in conjunction with the basic local exchange the customer subscribes to. Note: There is a flat rate per month for the service and calls in excess of the measured usage allowance are billed by the number of minutes.

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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

Saver Service (WatsSaver)

Saver Service is a set of specifically designed toll Optimal Calling Plans applicable to intrastate long distance calls originated and terminated in the customer's home calling zone/LATA and to intrastate long distance automated or operator assisted calling cards originated and terminated intrastate, IntraLATA.

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are:

- Business Budgeting Plan
- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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Business Budgeting Plan

Definition

The Business Budgeting Plan customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.

The Business Budgeting Plan is offered in both One-Way and Two-Way options.

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

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Options

Below is a table listing the options available to Louisiana customers subscribing to the Business Budgeting Plan with a description, USOC and S&E example for each:

Option	Description	One-Way USOC	Two-Way USOC	S&E Example
1	30-minute (1/2 hr) minimum, per account	OSW43	OSX12	I1 OSW43/TA 00, XX-XX-XX (due date)
2	120-minute (2 hr) minimum, per account	OSW43	OSX02	I1 OSX02/TA 00, XX-XX-XX (due date)
3	240-minute (5 hr) minimum, per account	OSW24	OSX04	I1 OSW24/TA 00, XX-XX-XX (due date)
4	900-minute (10 hr) minimum, per account	OSW45	OSX15	I1 OSW45/TA 00, XX-XX-XX (due date)
5	1,500-minute (25 hr) minimum, per account	OSW44	OSX25	I1 OSX25/TA 00, XX-XX-XX (due date)
6	3,300-minute (55 hr) minimum, per account	OSW33	OSX55	I1 OSW33/TA 00, XX-XX-XX (due date)
7	5,400-minute (90 hr) minimum, per account	OSW54	OSX90	I1 OSX90/TA 00, XX-XX-XX (due date)

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	**then . . .**
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Aggregate Plan

The Aggregate Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	then . . .
150 hours or more	refer them to Premis Marketing!
less than 150 hours	discuss the Budgeting Plan with them.

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

Student handout

SB504
FOR ALL STATES

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CHECKS FOR UNDERSTANDING

Optional Calling Plans

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

   _____ and depress _____.

2. If you need to determine exchanges in the Local Calling area what screen would you access?

   _____ and depress _____. What information does this screen provide

   1. _____
   2. _____
   3. _____
   4. _____
   5. _____
   6. _____
   7. _____

Student Name: _____

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Optional Calling Plans-LA SB504

Learning Advisor Guide
Issue 1 - October 1996

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Optional Calling Plans

SB504

Learning Advisor Guide

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Optional Calling Plans - Louisiana

Objectives

At the end of this lesson, the students will be able to:

- Explain Optional Calling Plans.
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service.

Advance Preparation

The following advance preparations will be necessary for class:

- Select live accounts with IntraLATA calls for students to use during terminal practice.
- Study this training material and be familiar with OCPs.
- Make overheads of the objectives and plans (available in the Presentation Aids section of this LAG).
- Create an order for each type of service to be used as a guide for you during student practice.

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Supplies and Materials

You will need the following materials listed below:

- Handbook./OLD
- Overhead projector
- Optional - Operating Standards and Tariffs

Students need to bring the following to class:

- OCP section of their Handbook
- Memo pads and pencils

Note to Learning Advisor

This lesson is divided into two handouts to give the specialist a better understanding of the Optional Calling Plans available to small business customers. Your interaction to enhance the learning of the student is very important.

Lead the students through the screens and make sure they understand how these screens help them understand customers' need and advise customers which optional calling plan will best suit the needs of their business.

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Introduction

In your own words, using the overheads you've prepared, explain to the students that our business customers have a choice of several optional calling plans and review the objectives of this lesson.

Practice

At the end of each handout, instruct the students to sign on to the system if they have not already done so.

- Give them the preselected telephone numbers and direct them to analyze the account and issue orders for appropriate plan.
- After the students input the orders, check for accuracy.
- Make sure the orders are canceled.

Business Only

There is no reference in this lesson to residence, trunks or NARs since small business most likely will not be involved with these orders.

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Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Louisiana.

Introduction

Optional Calling Plans (OCPs) are specifically designed toll plans applicable during specified periods.

Course Objectives

At the end of this lesson you will be able to:

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Optional Calling Plans Available in Louisiana

Below is a table listing the Calling Plans available to LA customers along with a description for each.

Plan	Description
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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

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Options

Below is a table listing the options available to Louisiana customers subscribing to the Business Budgeting Plan with a description, USOC and S&E example for each:

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3	240-minute (5 hr) minimum, per account	OSW24	OSX04	I1 OSW24/TA 00, XX-XX-XX (due date)
4	900-minute (10 hr) minimum, per account	OSW45	OSX15	I1 OSW45/TA 00, XX-XX-XX (due date)
5	1,500-minute (25 hr) minimum, per account	OSW44	OSX25	I1 OSX25/TA 00, XX-XX-XX (due date)
6	3,300-minute (55 hr) minimum, per account	OSW33	OSX55	I1 OSW33/TA 00, XX-XX-XX (due date)
7	5,400-minute (90 hr) minimum, per account	OSW54	OSX90	I1 OSX90/TA 00, XX-XX-XX (due date)

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
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corresponds with the contract date	issue order to disconnect

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Aggregate Plan

The Aggregate Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	**then . . .**
150 hours or more	refer them to Premis Marketing!
less than 150 hours	discuss the Budgeting Plan with them.

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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Presentation Aids

Objectives

At the end of this lesson, the student will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service

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Optional Calling Plans Available in Louisiana

- One-Way Measured Circle Calling
- Two-Way Measured Circle Calling
- LATA-Wide Reverse Billing
- Shreveport Metropolitan Calling Plan
- Saver Service Plans

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ROLE PLAYS

FOR

OPTIONAL CALLING PLANS

LEADER'S GUIDE
FOR ALL STATES

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ROLE PLAY

Scenario

CUSTOMER CALLS FOR AN EXPLANATION OF CHARGES ON BILL.

Three Role Play Activities

1. LA acts as Specialist to model behavior, student is customer
2. Students act as customer and Specialist
3. Customer and Specialist change roles

Preparation

Select three (3) live accounts for students to analyze billing. These accounts do not have to fit any special profile for Optional Calling Plans as the focus is on analyzing the account billing.

Make copies of the Bill and Items screens to be used by the student/customer.

Debrief

Debrief after each activity

Were the customer's questions answered?

Was there an opportunity for selling a plan?

If no - Why not?

If yes - what plan and why would it fit the customer's needs.

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First Role Play
Activity 1

Gather students around a terminal, explain that you will be acting as the Specialist and ask for a volunteer to act as the first customer.

Give the customer a copy of a **BILL** and **ITEM** screens to read from.

Ask the remaining students to observe. Remind them that you will conduct a debrief when the exercise is completed.

Conduct the Exercise

Start the exercise as you see fit. (Ring Ring... announce self)

Customer: "This is (*Mr.Ms.Mrs. read from bill copy*)_____, and I would like some help figuring out my bill."

Specialist: Questions customer:
Access account in BOCRIS.
Analyzes bill and explains charges.

Debrief

Ask students
were customer's questions answered?

Was there an opportunity to sell a plan?
If no, why not.
If yes, what plan would best fit the customer's needs?

What went well?

What needs to be improved?

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Role Play

For these two activities form students into pairs. Have one act as the customer the other as the Specialist. Student/customers should be logged off.

Activity 2	Provide the student/customer with an account bill and instruct the groups to begin. Monitor progress and assist as required.
Debrief	Debrief session. Use questions from first activity.
Activity 3	Reverse roles and provide the student/customer with the third account bill.
Debrief	When complete conduct a debriefing session using the questions from the first activity.

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Suggested Scenarios for Additional Roleplays *Note

Scenario 1	Customer calls to request information on optional calling plans, for their business account. Customer is very distracted and wants only basic information.
Scenario 2	Customer calls and wants to disconnect Optional Calling service from their business service. Before customer disconnects the service they would like to know the cost difference they may notice. Using the previous months bill, provide customer this information.
Scenario 3	Customer calls and wants an explanation of the Optional Calling plans currently on their business account. They were not sure from the original installation what they had so they will need a very basic explanation. Customer is very irritable.
Scenario 4	Customer wants to add Optional Calling plans to all business lines but would like them to be billed separately. Customer is in a big hurry.

*Use live accounts.

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

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CHECKS FOR UNDERSTANDING

OPTIONAL CALLING PLANS

Instructions

Distribute the check for understanding.

Ask students to complete and turn in.

Review results with each student separately. Place in student file.

You may want to conduct a debrief of the Check for Understanding if students have any questions.

Following is the LA version with answers.

Checks for Understanding
Optional Calling Plans.

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

ANS: TW, then depress PF/F2

2. If you need to determine exchanges in the Local Calling area what screen would you access?

ANS: BAMS screen, by entering BAMS on the command line and depressing PF/F7.

What information does this screen provide?

ANS:
1. Available Plans
2. Calling Bands
3. First minute charges
4. Additional minute charges
5. Local or Toll
6. City
7. NPA and NXX.

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MS.

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Optional Calling Plans-MS SB504

Student Handout
Issue 1 - October 1996

PERFORMANCE IMPROVEMENT

Optional Calling Plans

SB504

Student Handout

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Optional Calling Plans - Mississippi

Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Mississippi.

Introduction

Optional Calling Plans (OCPs) are specifically designed intercity calling plans applicable to intrastate intraLATA Dial Station-to-Station long distance calls placed during a specified service period.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Types of OCPs

OCPs are offered in two formats. They are defined as follows:

One-Way

This plan offers reduced rates to points included in the plan during the specified time periods of the plan.

Two-Way

This plan is available with certain OCP offerings. Under the plan, calls to and from the subscriber's number from exchanges included under the plan during specified time periods are billed to the subscriber's number at the reduced OCP rate.

The following pages will explain the different calling plans that are available in Mississippi.

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Options

The table below lists the OCPs available in Mississippi along with a description for each.

Plan	Option	Description
Measured Circle Calling		The Measured Circle Calling Plan covers a circle area from 16 miles to 55 miles areas. There is a monthly rate for the first hour or fraction thereof. After that first hour each additional 1/10 (6 min.) or fraction thereof is billed. This plan is divided into two options: - One-Way Measured Circle Calling - Two-Way Measured Circle Calling
	One-Way	This option applies to all customer-dialed (DDD) calls to exchanges within the customer's calling zone (LATA). In addition to the first-hour rate, the One-Way Plan is also offered on a 30-minute initial time period in specified exchanges.
	Two-Way	This option applies to all customer-dialed (DDD) calls originating and/or terminating from exchanges within the customer's calling zone (LATA). The due date on this plan is offered with an IEBD of 15 calendar days in the future when adding or removing the two-way calling plan only. Two-Way requires an ISB entry of "Two-Way Circle Calling" in the Bill section.
Measured Extended Community Calling	One-Way	The one-way option of Measured Extended Community Calling is furnished only on dial station-to-station calls originating one-way from the OCP subscriber's telephone to telephones in the prescribed terminating exchanges or area.
Measured Extended Community Calling	Two-Way	The two-way option of Measured Extended Community Calling provides: - dialed station-to-station calls originating one-way outward from the OCP subscriber's telephone to telephones in the prescribed terminating exchange or exchanges within the same LATA; or - all dialed station-to-station calls in the reverse direction originated by any telephone in the terminating exchange(s) within the same LATA and completed as an ongoing call to the telephone of the subscriber of the OCP. Usage time on calls in both directions will be accumulated and the total time determined will apply as total usage for the month in which billed.

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Hernando Calling Plans

Because Hernando, MS is in the Memphis, TN LATA, Hernando customers are offered three additional calling plans.

The table below lists each of the plans with a brief description.

Plan Name	Description
Hernando Measured Calling	This plan offers a limited number of locations that can be called. The locations are: 16-mile option = Exchanges - 342, 393, and 895* 30-mile option = Exchanges - 851 and 838* 40-mile option = Exchange - 778 55-mile option = Exchange - 768 * Independent Company
Hernando Optional Plan	This plan allows customers to call the Memphis, TN metropolitan exchange but does not allow them to call other exchanges local to Memphis, TN. The Hernando customer cannot have both kinds of optional calling plans. Your Handbook or OLD will provide you with the Memphis metropolitan exchanges.
Hernando Reverse Billing	This plan permits Hernando, MS customers who subscribe to the Area Calling Plan the option for a Memphis, TN telephone number to be listed/unlisted in the Memphis, TN telephone directory and have all incoming calls forwarded from Memphis, TN to their Hernando telephone number. (This option works much like the Call Forwarding Feature).

Restrictions

Hernando customers cannot have more than one Optional Calling Plan.

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Hernando Reverse Billing Specific

The following restrictions and miscellaneous notes are applicable to the Hernando Reverse Billing Plan (HRB).

- The Area Calling Plan is a usage-sensitive extended local calling basic local exchange service which provides a larger local calling area and more flexibility for the customer.
- Memphis, TN telephone numbers must be assigned to the service order establishing the HRB plan.
- The HRB option must be established on a new connect (N) order. The order is similar to Remote Call Forwarding (RCF) and will work like RCF does. A new Class of Service and access line USOC for this option must be used. Both the Class of Service and access line USOCs are the same. The USOC is RBOBB.
- The customer will be billed a monthly rate and a usage charge for this option. The usage charge will not exceed $25.00 per line.
- Both Mississippi and Tennessee Contact Personnel will take part in providing this service to Hernando customers. Mississippi offices are responsible for explaining and negotiating HRB with the ACP subscribers in Hernando. Tennessee will issue the necessary service order to establish the option and explain the bill.

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Hernando Reverse Billing Guidelines for Mississippi Contact Personnel

To follow is an action table listing the steps Mississippi Contact Personnel should take to establish the Hernando Reverse Billing calling plan.

Step	Action
1	Explain and negotiate the HRB option with the customer
2	Obtain the necessary information to establish account, e.g., listing information, bill address, credit information, etc.
3	Fax the information to Tennessee Contact Personnel using the Hernando, MS Reverse Billing Option Form. **(A copy of this form is included on the following page.)**
4	Note: Mississippi ACP account that the HRB option does exist.

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HERNANDO, MISSISSIPPI REVERSE BILLING OPTION FORM

(INFORMATION TO BE PROVIDED TENNESSEE SERVICE REPRESENTATIVES FOR THE ISSUANCE OF REVERSE BILLING OPTION ORDERS FOR HERNANDO, MISSISSIPPI CUSTOMERS.)

LISTED NAME (LAN); _____

CIRCLE CHOICE (IF APPLICABLE): NON-PUBLISHED NON-LISTED

HERNANDO TELEPHONE NUMBER: _____

LISTED ADDRESS (LA): _____

BILLING ADDRESS (BA): _____

ZIP CODE (DZIP): _____

CREDIT INFORMATION (CI): _____

_____

DUE DATE GIVEN CUSTOMER: _____

MISSISSIPPI CONTACT NAME: _____

TELEPHONE NUMBER: _____

_____

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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

Saver Service (WatsSaver)

Saver Service is a set of specifically designed toll Optimal Calling Plans applicable to intrastate long distance calls originated and terminated in the customer's home calling zone/LATA and to intrastate long distance automated or operator assisted calling cards originated and terminated intrastate, IntraLATA.

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are:

- Business Budgeting Plan (One-Way and Two-Way)
- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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Business Budgeting Plan

Definition

The Business Budgeting Plan customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

Options

The table below lists the options available under the Business Budgeting Plan with descriptions, USOCs and examples of each:

Option	Description	USOC	Example
1	120-minute (2 hr) minimum, per account	OSW02	I1 OSW02/TA 00, XX-XX-XX
2	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
3	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TA 00, XX-XX-XX
4	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
5	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX
6	6,600-minute (110 hr) minimum, per account	OSW11	I1 OSW11/TA 00, XX-XX-XX
7	15,000-minute (250 hr) minimum, per account	OSW50	I1 OSW50/TA 00, XX-XX-XX

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Minimum Contract Time

The minimum contract time for option one is one month. The minimum contract for options 2-7 is one year.

Restriction

The following restrictions apply to the Budgeting Plan.

- Partial billed to numbers (BTNs) are not eligible for this service.
- Full BTNs of accounts will be billed in the same RAO.
- Customer may not subscribe to more than one OCP that covers the same time period and area.

Disconnecting

If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates

Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Aggregate Plan

The Aggregate Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	then . . .
1500 hours or more	refer them to Premis Marketing!
less than 1500 hours	discuss the Budgeting Plan with them.

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

Student handout

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CHECKS FOR UNDERSTANDING

Optional Calling Plans

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

   _____ and depress _____.

2. If you need to determine exchanges in the Local Calling area what screen would you access?

   _____ and depress _____. What information does this screen provide

   1. _____
   2. _____
   3. _____
   4. _____
   5. _____
   6. _____
   7. _____

Student Name: _____

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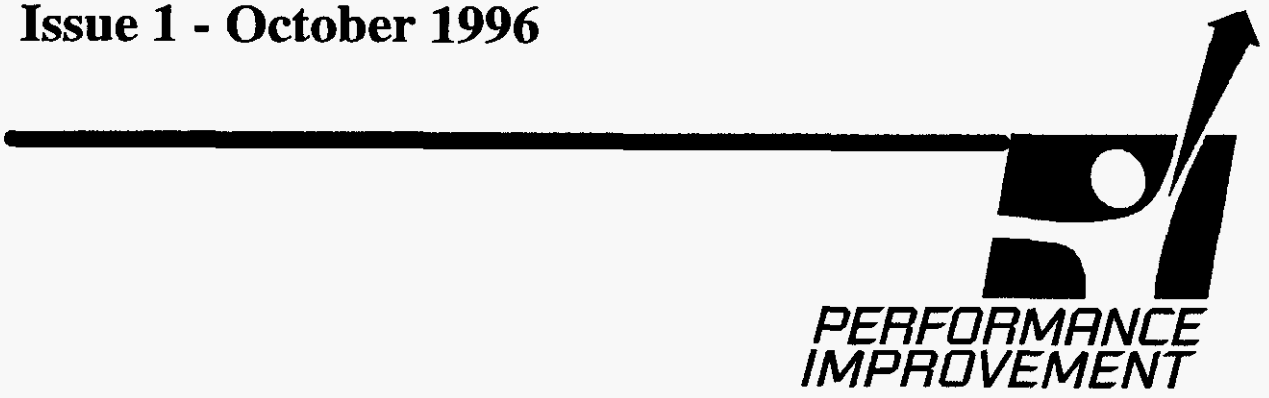
Optional Calling Plans-MS SB504

Learning Advisor Guide
Issue 1 - October 1996



Optional Calling Plans

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Optional Calling Plans - Mississippi

Objectives

At the end of this lesson, the students will be able to:

- Explain Optional Calling Plans.
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service.

Advance Preparation

The following advance preparations will be necessary for class:

- Select live accounts with IntraLATA calls for students to use during terminal practice.
- Study this training material and be familiar with OCPs.
- Make overheads of the objectives and plans (available in the Presentation Aids section of this LAG).
- Create an order for each type of service to be used as a guide for you during student practice.

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Supplies and Materials

You will need the following materials listed below:

- Handbook./OLD
- Overhead projector
- Optional - Operating Standards and Tariffs

Students need to bring the following to class:

- OCP section of their Handbook
- Memo pads and pencils

Note to Learning Advisor

This lesson is divided into two handouts to give the specialist a better understanding of the Optional Calling Plans available to small business customers. Your interaction to enhance the learning of the student is very important.

Lead the students through the screens and make sure they understand how these screens help them understand customers' need and advise customers which optional calling plan will best suit the needs of their business.

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Introduction

In your own words, using the overheads you've prepared, explain to the students that our business customers have a choice of several optional calling plans and review the objectives of this lesson.

Practice

At the end of each handout, instruct the students to sign on to the system if they have not already done so.

- Give them the preselected telephone numbers and direct them to analyze the account and issue orders for appropriate plan.
- After the students input the orders, check for accuracy.
- Make sure the orders are canceled.

Business Only

There is no reference in this lesson to residence, trunks or NARs since small business most likely will not be involved with these orders.

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Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Mississippi.

Introduction

Optional Calling Plans (OCPs) are specifically designed toll plans applicable during specified periods. OCPs are offered in two formats.

One-Way

This plan offers reduced rates to points included in the plan during the specified time periods of the plan.

Two-Way

This plan is available with certain OCP offerings. Under the plan, calls to and from the subscriber's number from exchanges included under the plan during specified time periods are billed to the subscriber's number at the reduced OCP rate.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
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Options

The table below lists the OCPs available in Mississippi along with a description for each.

Plan	Option	Description
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Hernando Calling Plans

Because Hernando, MS is in the Memphis, TN LATA, Hernando customers are offered three additional calling plans.

The table below lists each of the plans with a brief description.

Plan Name	Description
Hernando Measured Calling	This plan offers a limited number of locations that can be called. The locations are: 16-mile option = Exchanges - 342, 393, and 895* 30-mile option = Exchanges - 851 and 838* 40-mile option = Exchange - 778 55-mile option = Exchange - 768 * Independent Company
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Hernando Reverse Billing	This plan permits Hernando, MS customers who subscribe to the Area Calling Plan the option for a Memphis, TN telephone number to be listed/unlisted in the Memphis, TN telephone directory and have all incoming calls forwarded from Memphis, TN to their Hernando telephone number. (This option works much like the Call Forwarding Feature).

Restrictions

Hernando customers cannot have more than one Optional Calling Plan.

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Hernando Reverse Billing Specific

The following restrictions and miscellaneous notes are applicable to the Hernando Reverse Billing Plan (HRB).

- The Area Calling Plan is a usage-sensitive extended local calling basic local exchange service which provides a larger local calling area and more flexibility for the customer.
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- The HRB option must be established on a new connect (N) order. The order is similar to Remote Call Forwarding (RCF) and will work like RCF does. A new Class of Service and access line USOC for this option must be used. Both the Class of Service and access line USOCs are the same. The USOC is RBOBB.
- The customer will be billed a monthly rate and a usage charge for this option. The usage charge will not exceed $25.00 per line.
- Both Mississippi and Tennessee Contact Personnel will take part in providing this service to Hernando customers. Mississippi offices are responsible for explaining and negotiating HRB with the ACP subscribers in Hernando. Tennessee will issue the necessary service order to establish the option and explain the bill.

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Hernando Reverse Billing Guidelines for Mississippi Contact Personnel

To follow is an action table listing the steps Mississippi Contact Personnel should take to establish the Hernando Reverse Billing calling plan.

Step	Action
1	Explain and negotiate the HRB option with the customer
2	Obtain the necessary information to establish account, e.g., listing information, bill address, credit information, etc.
3	Fax the information to Tennessee Contact Personnel using the Hernando, MS Reverse Billing Option Form. **(A copy of this form is included on the following page.)**
4	Note: Mississippi ACP account that the HRB option does exist.

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HERNANDO, MISSISSIPPI REVERSE BILLING OPTION FORM

(INFORMATION TO BE PROVIDED TENNESSEE SERVICE REPRESENTATIVES FOR THE ISSUANCE OF REVERSE BILLING OPTION ORDERS FOR HERNANDO, MISSISSIPPI CUSTOMERS.)

LISTED NAME (LAN); _____

CIRCLE CHOICE (IF APPLICABLE): NON-PUBLISHED NON-LISTED

HERNANDO TELEPHONE NUMBER: _____

LISTED ADDRESS (LA): _____

BILLING ADDRESS (BA): _____

ZIP CODE (DZIP): _____

CREDIT INFORMATION (CI): _____

_____

DUE DATE GIVEN CUSTOMER: _____

MISSISSIPPI CONTACT NAME: _____

TELEPHONE NUMBER: _____

_____

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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

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- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

Business Budgeting Plan

Definition

The Business Budgeting Plan customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

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Options

The table below lists the options available under the Business Budgeting Plan with descriptions, USOCs and examples of each:

Option	Description	USOC	Example
1	120-minute (2 hr) minimum, per account	OSW02	I1 OSW02/TA 00, XX-XX-XX
2	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
3	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TA 00, XX-XX-XX
4	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
5	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX
6	6,600-minute (110 hr) minimum, per account	OSW11	I1 OSW11/TA 00, XX-XX-XX
7	15,000-minute (250 hr) minimum, per account	OSW50	I1 OSW50/TA 00, XX-XX-XX

Minimum Contract Time

The minimum contract time for option one is one month. The minimum contract for options 2-7 is one year.

Restriction

The following restrictions apply to the Budgeting Plan.

- Partial billed to numbers (BTNs) are not eligible for this service.
- Full BTNs of accounts will be billed in the same RAO.
- Customer may not subscribe to more than one OCP that covers the same time period and area.

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Aggregate Plan

The Aggregate Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	then . . .
1500 hours or more	refer them to Premis Marketing!
less than 1500 hours	discuss the Budgeting Plan with them.

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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Presentation Aids

Objectives

At the end of this lesson, the student will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service

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Optional Calling Plans Available in Mississippi

- One-Way Measured Circle Calling
- Two-Way Measured Circle Calling
- One-Way Measured Extended Community Calling
- Two-Way Measured Extended Community Calling
- Hernando Measured Calling
- Hernando Optional Calling
- Hernando Reverse Billing
- Saver Service Plans

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ROLE PLAYS

FOR

OPTIONAL CALLING PLANS

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ROLE PLAY

Scenario

CUSTOMER CALLS FOR AN EXPLANATION OF CHARGES ON BILL.

Three Role Play Activities

1. LA acts as Specialist to model behavior, student is customer
2. Students act as customer and Specialist
3. Customer and Specialist change roles

Preparation

Select three (3) live accounts for students to analyze billing. These accounts do not have to fit any special profile for Optional Calling Plans as the focus is on analyzing the account billing.

Make copies of the Bill and Items screens to be used by the student/customer.

Debrief

Debrief after each activity

Were the customer's questions answered?

Was there an opportunity for selling a plan?

If no - Why not?

If yes - what plan and why would it fit the customer's needs.

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First Role Play
Activity 1

Gather students around a terminal, explain that you will be acting as the Specialist and ask for a volunteer to act as the first customer.

Give the customer a copy of a **BILL** and **ITEM** screens to read from.

Ask the remaining students to observe. Remind them that you will conduct a debrief when the exercise is completed.

Conduct the Exercise

Start the exercise as you see fit. (Ring Ring... announce self)

Customer: "This is (*Mr.Ms.Mrs. read from bill copy*)_____, and I would like some help figuring out my bill."

Specialist: Questions customer:
Access account in BOCRIS.
Analyzes bill and explains charges.

Debrief

Ask students
were customer's questions answered?

Was there an opportunity to sell a plan?
If no, why not.
If yes, what plan would best fit the customer's needs?

What went well?

What needs to be improved?

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Role Play

For these two activities form students into pairs. Have one act as the customer the other as the Specialist. Student/customers should be logged off.

Activity 2	Provide the student/customer with an account bill and instruct the groups to begin. Monitor progress and assist as required.
Debrief	Debrief session. Use questions from first activity.
Activity 3	Reverse roles and provide the student/customer with the third account bill.
Debrief	When complete conduct a debriefing session using the questions from the first activity.

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Suggested Scenarios for Additional Roleplays *Note

Scenario 1	Customer calls to request information on optional calling plans, for their business account. Customer is very distracted and wants only basic information.
Scenario 2	Customer calls and wants to disconnect Optional Calling service from their business service. Before customer disconnects the service they would like to know the cost difference they may notice. Using the previous months bill, provide customer this information.
Scenario 3	Customer calls and wants an explanation of the Optional Calling plans currently on their business account. They were not sure from the original installation what they had so they will need a very basic explanation. Customer is very irritable.
Scenario 4	Customer wants to add Optional Calling plans to all business lines but would like them to be billed separately. Customer is in a big hurry.

*Use live accounts.

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CHECKS for UNDERSTANDING

FOR

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CHECKS FOR UNDERSTANDING

OPTIONAL CALLING PLANS

Instructions

Distribute the check for understanding.

Ask students to complete and turn in.

Review results with each student separately. Place in student file.

You may want to conduct a debrief of the Check for Understanding if students have any questions.

Following is the LA version with answers.

Checks for Understanding
Optional Calling Plans.

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

ANS: TW, then depress PF/F2

2. If you need to determine exchanges in the Local Calling area what screen would you access?

ANS: BAMS screen, by entering BAMS on the command line and depressing PF/F7.

What information does this screen provide?

ANS:
1. Available Plans
2. Calling Bands
3. First minute charges
4. Additional minute charges
5. Local or Toll
6. City
7. NPA and NXX.

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Student Handout
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Optional Calling Plans - North Carolina

Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in North Carolina.

Introduction

Optional Calling Plans (OCPs) are specifically designed toll plans applicable during specified periods.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Plans

The plans available in North Carolina are:

- Charlotte, NC to Ft. Mill, SC
- Enhanced Extended Community Calling
- MetroConnection Plan

The tables on the next pages define for you each plan.

Charlotte, NC to Ft. Mill, SC Plan

The table below list the options available with Charlotte, NC to Ft. Mill, SC plan with a description for each option

Plan Name	Option	USOC	Description
Charlotte, NC to Ft. Mill, SC			The Charlotte, NC to Ft. Mill, SC provides reduced rate local calling between the Charlotte exchange and the Ft. Mill Telecommunications Co. This plan consists of two options:
	1	LCPIN	This option provides outgoing calling from Charlotte to Ft. Mill at a rate of 50% of the extended area service usage schedule. Calls are rated based on a usage schedule. A fixed monthly rate applies. This option is subscribed to on a per-line basis. The plan is available on all customer direct-dialed calls and customer-dialed calling card calls between Charlotte and Ft. Mill. The plan is not available on operator-assisted calls. Calls made from customers in Charlotte to Ft. Mill will now be considered local. They will utilize a local usage schedule. The Ft. Mill exchange will be added to the local calling area for the Charlotte exchange.
	2	RBOB2	This option gives subscribers in the Ft. Mill exchange the ability to pay for calls received at their location but placed from the Charlotte exchange. The Ft. Mill customer is assigned a telephone number in the Charlotte exchange with an associated directory listing if desired. Calls to this Charlotte number are forwarded to the subscriber's location much like the Remote Call Forwarding feature. The Ft. Mill subscriber pays for incoming calls at a rate of 50% of extended area service usage schedule. A fixed monthly rate applies. Ft. Mill, SC customers must call the Southern Bell Order Center to obtain Option 2.

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FIDS

The following FIDs are used in the S&E section of the order:

- SFG - Simulated Facilities Group
  The SGF number is used to monitor an incoming call, allowing multiple, simultaneous access to the remote location. The customer must subscribe to additional access paths to allow for this. The SFG number is obtained through Line and Number and follows the TN FID after Class of Service USOC.

- CFN - Call Forwarding Number
  The area code and number that the calls are forwarded to is shown following this FID.

- *GSZ - Group Size*
  The number of lines on access paths provided are shown after this FID. A customer is given the option to purchase additional facilities on the initial order or at any time during subsequent order activity. The GSZ number must correspond with the actual number of access paths provided.

- STN - Screening Telephone Number
  The telephone number associated with the Screening Line Equipment Number (LEN) is on with STN.

Examples

Example for single-access path:

```
---S&E

I1      RBOB2/TN XXX-XXXX/SFG XXX /GSZ 1/STN XXX XXX/CFN
        803-XXX-XXXX
```

Example for customer who has three lines in Ft. Mill and needs additional access paths:

```
---S&E

I1      RBOB2/TN XXX-XXXX/SFG XXX
          /GSZ 1/STN XXX XXX
          /CFN
        803-XXX-XXXX
```


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Enhanced Extended Community Calling

The table below outlines the definition and USOC for the Enhanced Extended Community Calling Plan.

Plan Name	USOC	Description
Enhanced Extended Community Calling	OS22M	Enhanced Extended Community Calling provides measured calling on customer-dialed station-to-station for station calls to locations outside of the subscriber's local calling area, but within the same LATA. - The initial time period is 30 minutes with a one-minute minimum and after that overtime is charged for each 1/10th hour (6 min.). - The minimum contract period is one month. - Partial month charges are prorated. - Discount is based on the number of minutes talked. The discount is 25% to 50% based on the date and time of calls.

Applicable Exchanges

This plan is only available in certain exchanges in North Carolina. Look in your Handbook or OLD for the applicable exchanges.

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Metro-Connection Plan

This plan is offered only to subscribers in the Raleigh, Cary, Chapel Hill, Troutman, Salisbury and Cleveland exchanges. This plan consist of two offerings:

- one offering for Residence customers only and
- one for Business customers only - MetroDiscount.

The MetroDiscount offering is available in two options. The following table lists these options with a description and USOC for each.

Option	USOC	Description
1	NS112	This option is now Grandfathered so it is no longer offered to customers. If a customers with this option moves, he must choose a different plan. Option provides a 50% discount on direct-dialed long-distance calls to any of the specified exchanges. A fixed monthly rate applies.
2	NS212	This Option provides a uniform $.25 message rate charge on calls to any of the specified exchanges. A fixed monthly charge applies to this service. Rate Center Codes are needed for this option and can be found in your Handbook or OLD.

Directory

Customers subscribing to the MetroDiscount offering are entitled to one complimentary directory in their exchange. The customer must request a new directory each year.

The directory number is 1-800-422-1955.

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How to Analyze Your Customer's Account

Analyzing Customer's Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

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Saver Service (WatsSaver)

Saver Service is a set of specifically designed toll Optimal Calling Plans applicable to intrastate long distance calls originated and terminated in the customer's home calling zone/LATA and to intrastate long distance automated or operator-assisted calling card calls originated and terminated Intrastate, IntraLATA.

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are three different plans available under Saver Service. They are:

- Business Budgeting Plan
- Business Discount Plan
- Business AggregatedPlan

Availability & Offering

- This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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The Business Budgeting Plan

The Business Budgeting Plan provides customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate. This plan is available in two offerings:

- Inside Expanded Local Calling Area
- Outside Expanded Local Calling Area

Options

Below are tables listing the options available under the Inside Expanded Local Area and Outside Expanded Local Calling Area offerings. Descriptions, USOCs and S&E Examples are also provided.

Inside Expanded Local Calling Area Options

Option	Description	USOC	Example
WS2	120 minute (2 hr) minimum, per account	OSW02	I1 OSW02/TA 00, XX-XX-XX
WS5	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
WS10	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TA 00, XX-XX-XX
WS25	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
WS60	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX

Outside Expanded Local Calling Area Options

Option	Description	USOC	Example
WS20	1,200 minute (20 hr) minimum, per account	OSW20	I1 OSW20/TA 00, XX-XX-XX
WS40	2,400-minute (40 hr) minimum, per account	OSW40	I1 OSW40/TA 00, XX-XX-XX
WS150	9,000-minute (150 hr) minimum, per account	OSWE9	I1 OSWE9/TA 00, XX-XX-XX
WS25	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
WS60	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX (due date)

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Term Agreement

Notice the TA FID after the USOC in the S&E examples above. The system requires a TA FID on the order, though at this time there is no Term Agreement. The length of the contract will be shown as "00" along with the date the plan was established (usually the same as the due date).

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum of call duration of 30 seconds.

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

Restrictions The following restrictions apply to the Business Budgeting Plan;

- Partial billed to numbers (BTNs) are not eligible for this service.
- Full BTNs of accounts will be billed in the same RAO.
- Customers may not subscribe to more than one OCP that covers the same time period and area.
- Individual message detail provided (not option)

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Business Discount Plan

Business Discount Plan

The Business Discount Plan applies to all intrastate long distance calls originating and terminating in customers calling zone/LATA. The plan offers two options.

Options

The table below lists the options available with the Discount Plan and descriptions and USOCs for each.

Option	Description	USOCs
Discount Plan - Per Line	This option is used only for customers outside a mandatory expanded calling area and provides a 20% discount for subscribers.	OSW1B
Discount Plan - Per Line - Outside Expanded Local	This options applies to customers inside a mandatory expanded local calling area and will accumulate toll usage within their LATA, but outside their expanded local calling area. This option also provides a 20% discount for subscribers.	OSWEB

Billing

The monthly recurring rate is determined by the number of local exchange lines multiplied by the fixed monthly rate.

Example A customer has five local exchange lines in service for the entire billing period.

5 lines x $X.XX (rate per line) = monthly recurring rate.

Lines that are only in service a fraction of the month are prorated based on the number of days in service divided by 30 days.

At the end of the billing period, the accumulated toll usage charges are discounted by a percentage depending on the option the customer has chosen.

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Service Ordering Change

A service ordering applies per customer request when the plan is ordered and no other work requiring central office work is performed. A "C" order is required.

If other work is being performed that requires central office work, the appropriate central office line connection charges applies.

Term Agreement

The FID TA (term agreement) and associated data will be formatted following the plan USOC in the S&E section of the order. This FID is to show the length of the contract and the date the plan was established. At the present time, there is not tariff requirement for notification for disconnection of the plan; however, there is an edit in effect that requires the TA FID. The length of the contract will be shown as "00" along with the date the plan was established.

S&E Example

```
---S&E

I1      OSW2B/TA 00, XX-XX-XX (date plan established - normally due date)
```

Restrictions

The following restrictions apply to the Saver Saver Discount Plan:

- Customers in the following LATAs must choose the OSWEB option:
  - Gastonia
  - Raleigh
  - Wilmington
  - Greensboro
- Customers must subscribe to the plan on all lines on the account.

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Aggregated Plan

The Aggregated Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	**then . . .**
6000 hours or more	refer them to Premis Marketing!
less than 6000 hours	discuss with them one of the Budgeting Plans (One-Way or Two-Way)

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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CHECKS for UNDERSTANDING

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CHECKS FOR UNDERSTANDING

Optional Calling Plans

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

   _____ and depress _____.

2. If you need to determine exchanges in the Local Calling area what screen would you access?

   _____ and depress _____. What information does this screen provide

   1. _____
   2. _____
   3. _____
   4. _____
   5. _____
   6. _____
   7. _____

Student Name: _____

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Optional Calling Plans - North Carolina

Objectives

At the end of this lesson, the students will be able to:

- Explain Optional Calling Plans.
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service.

Advance Preparation

The following advance preparations will be necessary for class:

- Select live accounts with IntraLATA calls for students to use during terminal practice.
- Study this training material and be familiar with OCPs.
- Make overheads of the objectives and plans (available in the Presentation Aids section of this LAG).
- Create an order for each type of service to be used as a guide for you during student practice.

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Supplies and Materials

You will need the following materials listed below:

- Handbook./OLD
- Overhead projector
- Optional - Operating Standards and Tariffs

Students need to bring the following to class:

- OCP section of their Handbook
- Memo pads and pencils

Note to Learning Advisor

This lesson is divided into two handouts to give the specialist a better understanding of the Optional Calling Plans available to small business customers. Your interaction to enhance the learning of the student is very important.

Lead the students through the screens and make sure they understand how these screens help them understand customers' need and advise customers which optional calling plan will best suit the needs of their business.

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Introduction

In your own words, using the overheads you've prepared, explain to the students that our business customers have a choice of several optional calling plans and review the objectives of this lesson.

Practice

At the end of each handout, instruct the students to sign on to the system if they have not already done so.

- Give them the preselected telephone numbers and direct them to analyze the account and issue orders for appropriate plan.
- After the students input the orders, check for accuracy.
- Make sure the orders are canceled.

Business Only

There is no reference in this lesson to residence, trunks or NARs since small business most likely will not be involved with these orders.

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Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in North Carolina.

Introduction

Optional Calling Plans (OCPs) are specifically designed toll plans applicable during specified periods.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Optional Calling Plans Available in North Carolina

The plans available in North Carolina are:

- Charlotte, NC to Ft. Mill, SC
- Enhanced Extended Community Calling
- MetroConnection Plan

The tables on the next pages define for you each plan.

Charlotte, NC to Ft. Mill, SC Plan

The table below list the options available with Charlotte, NC to Ft. Mill, SC plan with a description for each option

Plan Name	Option	USOC	Description
Charlotte, NC to Ft. Mill, SC			The Charlotte, NC to Ft. Mill, SC provides reduced rate local calling between the Charlotte exchange and the Ft. Mill Telecommunications Co. This plan consists of two options:
	1	LCPIN	This option provides outgoing calling from Charlotte to Ft. Mill at a rate of 50% of the extended area service usage schedule. Calls are rated based on a usage schedule. A fixed monthly rate applies. This option is subscribed to on a per-line basis. The plan is available on all customer direct-dialed calls and customer-dialed calling card calls between Charlotte and Ft. Mill. The plan is not available on operator-assisted calls. Calls made from customers in Charlotte to Ft. Mill will now be considered local. They will utilize a local usage schedule. The Ft. Mill exchange will be added to the local calling area for the Charlotte exchange.
	2	RBOB2	This option gives subscribers in the Ft. Mill exchange the ability to pay for calls received at their location but placed from the Charlotte exchange. The Ft. Mill customer is assigned a telephone number in the Charlotte exchange with an associated directory listing if desired. Calls to this Charlotte number are forwarded to the subscriber's location much like the Remote Call Forwarding feature. The Ft. Mill subscriber pays for incoming calls at a rate of 50% of extended area service usage schedule. A fixed monthly rate applies. Ft. Mill, SC customers must call the Southern Bell Order Center to obtain Option 2.

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FIDS

The following FIDs are used in the S&E section of the order:

- SFG - Simulated Facilities Group
  The SGF number is used to monitor an incoming call, allowing multiple, simultaneous access to the remote location. The customer must subscribe to additional access paths to allow for this. The SFG number is obtained through Line and Number and follows the TN FID after Class of Service USOC.

- CFN - Call Forwarding Number
  The area code and number that the calls are forwarded to is shown following this FID.

- GSZ - Group Size
  The number of lines on access paths provided are shown after this FID. A customer is given the option to purchase additional facilities on the initial order or at any time during subsequent order activity. The GSZ number must correspond with the actual number of access paths provided.

- STN - Screening Telephone Number
  The telephone number associated with the Screening Line Equipment Number (LEN) is on with STN.

Examples

Example for single-access path:

```
---S&E

I1      RBOB2/TN XXX-XXXX/SFG XXX /GSZ 1/STN XXX XXX/CFN
        803-XXX-XXXX
```

Example for customer who has three lines in Ft. Mill and needs additional access paths:

```
---S&E

I1      RBOB2/TN XXX-XXXX/SFG XXX
          /GSZ 1/STN XXX XXX
          /CFN
        803-XXX-XXXX
```


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Enhanced Extended Community Calling

The table below outlines the definition and USOC for the Enhanced Extended Community Calling Plan.

Plan Name	USOC	Description
Enhanced Extended Community Calling	OS22M	Enhanced Extended Community Calling provides measured calling on customer-dialed station-to-station for station calls to locations outside of the subscriber's local calling area, but within the same LATA. - The initial time period is 30 minutes with a one-minute minimum and after that overtime is charged for each 1/10th hour (6 min.). - The minimum contract period is one month. - Partial month charges are prorated. - Discount is based on the number of minutes talked. The discount is 25% to 50% based on the date and time of calls.

Applicable Exchanges

This plan is only available in certain exchanges in North Carolina. Look in your Handbook or OLD for the applicable exchanges.

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Metro-Connection Plan

This plan is offered only to subscribers in the Raleigh, Cary, Chapel Hill, Troutman, Salisbury and Cleveland exchanges. This plan consist of two offerings:

- one offering for Residence customers only and
- one for Business customers only - MetroDiscount.

The MetroDiscount offering is available in two options. The following table lists these options with a description and USOC for each.

Option	USOC	Description
1	NS112	This option is now Grandfathered so it is no longer offered to customers. If a customers with this option moves, he must choose a different plan. Option provides a 50% discount on direct-dialed long-distance calls to any of the specified exchanges. A fixed monthly rate applies.
2	NS212	This Option provides a uniform $.25 message rate charge on calls to any of the specified exchanges. A fixed monthly charge applies to this service. Rate Center Codes are needed for this option and can be found in your Handbook or OLD.

Directory

Customers subscribing to the MetroDiscount offering are entitled to one complimentary directory in their exchange. The customer must request a new directory each year.

The directory number is 1-800-422-1955.

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How to Analyze Your Customer's Account

Analyzing Customer's Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

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Saver Service (WatsSaver)

Saver Service is a set of specifically designed toll Optimal Calling Plans applicable to intrastate long distance calls originated and terminated in the customer's home calling zone/LATA and to intrastate long distance automated or operator-assisted calling card calls originated and terminated Intrastate, IntraLATA.

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are three different plans available under Saver Service. They are:

- Business Budgeting Plan
- Business Discount Plan
- Business AggregatedPlan

Availability & Offering

- This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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The Business Budgeting Plan

The Business Budgeting Plan provides customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate. This plan is available in two offerings:

- Inside Expanded Local Calling Area
- Outside Expanded Local Calling Area

Options

Below are tables listing the options available under the Inside Expanded Local Area and Outside Expanded Local Calling Area offerings. Descriptions, USOCs and S&E Examples are also provided.

Inside Expanded Local Calling Area Options

Option	Description	USOC	Example
WS2	120 minute (2 hr) minimum, per account	OSW02	I1 OSW02/TA 00, XX-XX-XX
WS5	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
WS10	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TA 00, XX-XX-XX
WS25	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
WS60	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX

Outside Expanded Local Calling Area Options

Option	Description	USOC	Example
WS20	1,200 minute (20 hr) minimum, per account	OSW20	I1 OSW20/TA 00, XX-XX-XX
WS40	2,400-minute (40 hr) minimum, per account	OSW40	I1 OSW40/TA 00, XX-XX-XX
WS150	9,000-minute (150 hr) minimum, per account	OSWE9	I1 OSWE9/TA 00, XX-XX-XX
WS25	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
WS60	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX (due date)

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Term Agreement

Notice the TA FID after the USOC in the S&E examples above. The system requires a TA FID on the order, though at this time there is no Term Agreement. The length of the contract will be shown as "00" along with the date the plan was established (usually the same as the due date).

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum of call duration of 30 seconds.

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

Restrictions The following restrictions apply to the Business Budgeting Plan;

- Partial billed to numbers (BTNs) are not eligible for this service.
- Full BTNs of accounts will be billed in the same RAO.
- Customers may not subscribe to more than one OCP that covers the same time period and area.
- Individual message detail provided (not option)

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Business Discount Plan

Business Discount Plan

The Business Discount Plan applies to all intrastate long distance calls originating and terminating in customers calling zone/LATA. The plan offers two options.

Options

The table below lists the options available with the Discount Plan and descriptions and USOCs for each.

Option	Description	USOCs
Discount Plan - Per Line	This option is used only for customers outside a mandatory expanded calling area and provides a 20% discount for subscribers.	OSW1B
Discount Plan - Per Line - Outside Expanded Local	This options applies to customers inside a mandatory expanded local calling area and will accumulate toll usage within their LATA, but outside their expanded local calling area. This option also provides a 20% discount for subscribers.	OSWEB

Billing

The monthly recurring rate is determined by the number of local exchange lines multiplied by the fixed monthly rate.

Example A customer has five local exchange lines in service for the entire billing period.

5 lines x $X.XX (rate per line) = monthly recurring rate.

Lines that are only in service a fraction of the month are prorated based on the number of days in service divided by 30 days.

At the end of the billing period, the accumulated toll usage charges are discounted by a percentage depending on the option the customer has chosen.

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Service Ordering Change

A service ordering applies per customer request when the plan is ordered and no other work requiring central office work is performed. A "C" order is required.

If other work is being performed that requires central office work, the appropriate central office line connection charges applies.

Term Agreement

The FID TA (term agreement) and associated data will be formatted following the plan USOC in the S&E section of the order. This FID is to show the length of the contract and the date the plan was established. At the present time, there is not tariff requirement for notification for disconnection of the plan; however, there is an edit in effect that requires the TA FID. The length of the contract will be shown as "00" along with the date the plan was established.

S&E Example

```
---S&E

I1      OSW2B/TA 00, XX-XX-XX (date plan established - normally due date)
```

Restrictions

The following restrictions apply to the Saver Saver Discount Plan:

- Customers in the following LATAs must choose the OSWEB option:
  - Gastonia
  - Raleigh
  - Wilmington
  - Greensboro
- Customers must subscribe to the plan on all lines on the account.

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Aggregated Plan

The Aggregated Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	then . . .
6000 hours or more	refer them to Premis Marketing!
less than 6000 hours	discuss with them one of the Budgeting Plans (One-Way or Two-Way)

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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Presentation Aids

Objectives

At the end of this lesson, the student will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan to the customer
- Issue orders to add service or change existing service

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Plans Available in north Carolina

Following is a list of plans currently offered in North Carolina

- Charlotte, NC to Ft. Mill, SC
- Enhanced Extended Community Calling
- MetroConnection Plan
- Saver Service Plans

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ROLE PLAYS

FOR

OPTIONAL CALLING PLANS

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FOR ALL STATES

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ROLE PLAY

Scenario

CUSTOMER CALLS FOR AN EXPLANATION OF CHARGES ON BILL.

Three Role Play Activities

1. LA acts as Specialist to model behavior, *student is customer*
2. Students act as customer and Specialist
3. Customer and Specialist change roles

Preparation

Select three (3) live accounts for students to analyze billing. These accounts do not have to fit any special profile for Optional Calling Plans as the focus is on analyzing the account billing.

Make copies of the Bill and Items screens to be used by the student/customer.

Debrief

Debrief after each activity

Were the customer's questions answered?

Was there an opportunity for selling a plan?

If no - Why not?

If yes - what plan and why would it fit the customer's needs.

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First Role Play
Activity 1

Gather students around a terminal, explain that you will be acting as the Specialist and ask for a volunteer to act as the first customer.

Give the customer a copy of a **BILL** and **ITEM** screens to read from.

Ask the remaining students to observe. Remind them that you will conduct a debrief when the exercise is completed.

Conduct the Exercise

Start the exercise as you see fit. (Ring Ring... announce self)

Customer: "This is (*Mr.Ms.Mrs. read from bill copy*)_____, and I would like some help figuring out my bill."

Specialist: Questions customer:
Access account in BOCRIS.
Analyzes bill and explains charges.

Debrief

Ask students

were customer's questions answered?

Was there an opportunity to sell a plan?

If no, why not.

If yes, what plan would best fit the customer's needs?

What went well?

What needs to be improved?

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Role Play

For these two activities form students into pairs. Have one act as the customer the other as the Specialist. Student/customers should be logged off.

Activity 2	Provide the student/customer with an account bill and instruct the groups to begin. Monitor progress and assist as required.
Debrief	Debrief session. Use questions from first activity.
Activity 3	Reverse roles and provide the student/customer with the third account bill.
Debrief	When complete conduct a debriefing session using the questions from the first activity.

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Suggested Scenarios for Additional Roleplays *Note

Scenario 1	Customer calls to request information on optional calling plans, for their business account. Customer is very distracted and wants only basic information.
Scenario 2	Customer calls and wants to disconnect Optional Calling service from their business service. Before customer disconnects the service they would like to know the cost difference they may notice. Using the previous months bill, provide customer this information.
Scenario 3	Customer calls and wants an explanation of the Optional Calling plans currently on their business account. They were not sure from the original installation what they had so they will need a very basic explanation. Customer is very irritable.
Scenario 4	Customer wants to add Optional Calling plans to all business lines but would like them to be billed separately. Customer is in a big hurry.

*Use live accounts.

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

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CHECKS FOR UNDERSTANDING

OPTIONAL CALLING PLANS

Instructions

Distribute the check for understanding.

Ask students to complete and turn in.

Review results with each student separately. Place in student file.

You may want to conduct a debrief of the Check for Understanding if students have any questions.

Following is the LA version with answers.

Checks for Understanding
Optional Calling Plans.

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

ANS: TW, then depress PF/F2

2. If you need to determine exchanges in the Local Calling area what screen would you access?

ANS: BAMS screen, by entering BAMS on the command line and depressing PF/F7.

What information does this screen provide?

ANS:
1. Available Plans
2. Calling Bands
3. First minute charges
4. Additional minute charges
5. Local or Toll
6. City
7. NPA and NXX.

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Optional Calling Plans-SC
SB504

Student Handout
Issue 1 - October 1996

PERFORMANCE
IMPROVEMENT

Optional Calling Plans

SB504

Student Handout

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Optional Calling Plans - South Carolina

Handout

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

Saver Service (WatsSaver)

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are:

- Business Budgeting Plan
- Budgeting Plan (Two-Business Discount Plan)
- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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Business Budgeting Plan

Business Budgeting Plan

The business Budgeting Plan provides customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

Options

Below is a table listing the options available to South Carolina customers subscribing to the Business Budgeting Plan. Also provided is a description, USOC and S&E Example for each.

Option	Description	USOC	Example
WS03	30-minute (1/2 hr) minimum, per account	OSW02	I1 OSW03/TA 00, XX-XX-XX
WS5	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
WS18	1,080-minute (18 hr) minimum, per account	OSW10	I1 OSW03/TA 00, XX-XX-XX
WS38	2,280-minute (38 hr) minimum, per account	OSW25	I1 OSW03/TA 00, XX-XX-XX
WS65	3,900-minute (65 hr) minimum, per account	OSW60	I1 OSW03/TA 00, XX-XX-XX
WS114	6,840-minute (114 hr) minimum, per account	OSW10	I1 OSW03/TA 00, XX-XX-XX
WS250	15,000-minute (250 hr) minimum, per account	OSW25	I1 OSW03/TA 00, XX-XX-XX
WS500	30,000-minute (500 hr) minimum, per account	OSW60	I1 OSW03/TA 00, XX-XX-XX

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Minimum Contract Period	A one-month minimum period applies
Service Order Charges	Secondary service ordering charge applies per customer request when the plan is ordered and no other work requiring central office work is performed.
Restrictions	**Restrictions** The following restrictions apply to the Budgeting Plan options: • Plan is offered and billed on an account basis only. • Suspension of service is not allowed. • No partial BTN situations are allowed. • Customer may only subscribe to one toll optional calling plan at a time.

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Discount Plan

Discount Plan

The Discount Plan applies to all customer intrastate long distance calls originating and terminating Intrastate/IntraLATA. With this plan, for a fixed monthly rate, the customer receives a discount in addition to the normal discounts that apply (i.e., evening, weekend, etc.). Customers may select from two options.

Options

Below is a table listing the options available under the Discount Plan with a description and USOC for each.

Option	Description	USOC
1	With this option, the customer pays a small monthly rate and receives a 20% discount on toll calls.	OSW1B
2	For a slightly higher monthly rate, this option provides a 25% discount for the customer.	OSW2B

Billing

With either of these plans, a customer may use up to the initial block of time of toll calling per account for a fixed monthly rate. Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

Monthly Recurring Rate

The monthly recurring rate for a full month is determined by the number of local exchange lines multiplied by the fixed monthly rate per month.

Example: A customer has five local exchange lines in service for the entire billing period.

5 lines x $X.XX (rate per line) = monthly recurring rate.

Those lines in service for a fraction of the month are prorated based on the number of days in service divided by 30 days.

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Service Ordering Charge

A service ordering charge applies per customer request when the plan is ordered and no other central office work is required. A "C" order is required.

If no other work is being performed that requires central office work, the appropriate central office line connection charge applies. If requested within five calendar days of next billing period, order MUST have EBD of close billing and the customer MUST be advised that the plan is effective with the next billing date.

Term Agreement

The FID TA (term agreement) and associated data will be formatted following the plan USOC in the S&E section of the order. This FID is to show the length of the contract and the date the plan was established.

At present there is no tariff requirement for notification for disconnection of the plan; however, there is an edit that requires the TA FID. The length of the contract will be shown as "00" along with the date the plan was established (normally the due date).

Example: ---S&E
I1 OSW B/TA 00,XX-XX-XX (date plan published)

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Aggregated Plan

Aggregated Plan

The Aggregated Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customer's accounts and

If the customer has . . .	then . . .
600 hours or more	refer them to Premis Marketing!
less than 600 hours	discuss either the Budgeting Plan or the Discount Plan with them.

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How to Analyze Your Customer's Account

Analyzing Customer's Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

Student handout

SB504
FOR ALL STATES

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CHECKS FOR UNDERSTANDING

Optional Calling Plans

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

   _____ and depress _____.

2. If you need to determine exchanges in the Local Calling area what screen would you access?

   _____ and depress _____. What information does this screen provide

   1. _____
   2. _____
   3. _____
   4. _____
   5. _____
   6. _____
   7. _____

Student Name: _____

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L A.

SC.

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Optional Calling Plan-SC
SB504

Learning Advisor Guide
Issue 1 - October 1996

Optional Calling Plans

SB504

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Optional Calling Plans - South Carolina

Objectives

At the end of this lesson, the students will be able to:

- Explain Optional Calling Plans.
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service.

Advance Preparation

The following advance preparations will be necessary for class:

- Select live accounts with IntraLATA calls for students to use during terminal practice.
- Study this training material and be familiar with OCPs.
- Make overheads of the objectives and plans (available in the Presentation Aids section of this LAG).
- Create an order for each type of service to be used as a guide for you during student practice.

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Supplies and Materials

You will need the following materials listed below:

- Handbook./OLD
- Overhead projector
- Optional - Operating Standards and Tariffs

Students need to bring the following to class:

- OCP section of their Handbook
- Memo pads and pencils

Note to Learning Advisor

This lesson is divided into two handouts to give the specialist a better understanding of the Optional Calling Plans available to small business customers. Your interaction to enhance the learning of the student is very important.

Lead the students through the screens and make sure they understand how these screens help them understand customers' need and advise customers which optional calling plan will best suit the needs of their business.

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Introduction

In your own words, using the overheads you've prepared, explain to the students that our business customers have a choice of several optional calling plans and review the objectives of this lesson.

Practice

At the end of each handout, instruct the students to sign on to the system if they have not already done so.

- Give them the preselected telephone numbers and direct them to analyze the account and issue orders for appropriate plan.
- After the students input the orders, check for accuracy.
- Make sure the orders are canceled.

Business Only

There is no reference in this lesson to residence, trunks or NARs since small business most likely will not be involved with these orders.

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Handout

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

Saver Service (WatsSaver)

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are:

- Business Budgeting Plan
- Budgeting Plan (Two-Business Discount Plan)
- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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Business Budgeting Plan

Business Budgeting Plan

The business Budgeting Plan provides customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

Options

Below is a table listing the options available to South Carolina customers subscribing to the Business Budgeting Plan. Also provided is a description, USOC and S&E Example for each.

Option	Description	USOC	Example
WS03	30-minute (1/2 hr) minimum, per account	OSW02	I1 OSW03/TA 00, XX-XX-XX
WS5	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
WS18	1,080-minute (18 hr) minimum, per account	OSW10	I1 OSW03/TA 00, XX-XX-XX
WS38	2,280-minute (38 hr) minimum, per account	OSW25	I1 OSW03/TA 00, XX-XX-XX
WS65	3,900-minute (65 hr) minimum, per account	OSW60	I1 OSW03/TA 00, XX-XX-XX
WS114	6,840-minute (114 hr) minimum, per account	OSW10	I1 OSW03/TA 00, XX-XX-XX
WS250	15,000-minute (250 hr) minimum, per account	OSW25	I1 OSW03/TA 00, XX-XX-XX
WS500	30,000-minute (500 hr) minimum, per account	OSW60	I1 OSW03/TA 00, XX-XX-XX

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Minimum Contract Period	A one-month minimum period applies
Service Order Charges	Secondary service ordering charge applies per customer request when the plan is ordered and no other work requiring central office work is performed.
Restrictions	**Restrictions** The following restrictions apply to the Budgeting Plan options: • Plan is offered and billed on an account basis only. • Suspension of service is not allowed. • No partial BTN situations are allowed. • Customer may only subscribe to one toll optional calling plan at a time.

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Discount Plan

Discount Plan

The Discount Plan applies to all customer intrastate long distance calls originating and terminating Intrastate/IntraLATA. With this plan, for a fixed monthly rate, the customer receives a discount in addition to the normal discounts that apply (i.e., evening, weekend, etc.). Customers may select from two options.

Options

Below is a table listing the options available under the Discount Plan with a description and USOC for each.

Option	Description	USOC
1	With this option, the customer pays a small monthly rate and receives a 20% discount on toll calls.	OSW1B
2	For a slightly higher monthly rate, this option provides a 25% discount for the customer.	OSW2B

Billing

With either of these plans, a customer may use up to the initial block of time of toll calling per account for a fixed monthly rate. Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

Monthly Recurring Rate

The monthly recurring rate for a full month is determined by the number of local exchange lines multiplied by the fixed monthly rate per month.

Example: A customer has five local exchange lines in service for the entire billing period.

5 lines x $X.XX (rate per line) = monthly recurring rate.

Those lines in service for a fraction of the month are prorated based on the number of days in service divided by 30 days.

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Service Ordering Charge

A service ordering charge applies per customer request when the plan is ordered and no other central office work is required. A "C" order is required.

If no other work is being performed that requires central office work, the appropriate central office line connection charge applies. If requested within five calendar days of next billing period, order MUST have EBD of close billing and the customer MUST be advised that the plan is effective with the next billing date.

Term Agreement

The FID TA (term agreement) and associated data will be formatted following the plan USOC in the S&E section of the order. This FID is to show the length of the contract and the date the plan was established.

At present there is no tariff requirement for notification for disconnection of the plan; however, there is an edit that requires the TA FID. The length of the contract will be shown as "00" along with the date the plan was established (normally the due date).

Example: ---S&E
I1 OSW B/TA 00,XX-XX-XX (date plan published)

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Aggregated Plan

Aggregated Plan

The Aggregated Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customer's accounts and

If the customer has . . .	then . . .
600 hours or more	refer them to Premis Marketing!
less than 600 hours	discuss either the Budgeting Plan or the Discount Plan with them.

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How to Analyze Your Customer's Account

Analyzing Customer's Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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Presentation Aids

Objectives

At the end of this lesson, the student will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan to the customer
- Issue orders to add service or change existing service

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Plans

Following is a list of plans currently offered in South Carolina:

- Business Budgeting Plan
- Business Discount Plan
- Aggregated Plan

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ROLE PLAYS

FOR

OPTIONAL CALLING PLANS

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FOR ALL STATES

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ROLE PLAY

Scenario

CUSTOMER CALLS FOR AN EXPLANATION OF CHARGES ON BILL.

Three Role Play Activities

1. LA acts as Specialist to model behavior, student is customer
2. Students act as customer and Specialist
3. Customer and Specialist change roles

Preparation

Select three (3) live accounts for students to analyze billing. These accounts do not have to fit any special profile for Optional Calling Plans as the focus is on analyzing the account billing.

Make copies of the Bill and Items screens to be used by the student/customer.

Debrief

Debrief after each activity

Were the customer's questions answered?

Was there an opportunity for selling a plan?

If no - Why not?

If yes - what plan and why would it fit the customer's needs.

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First Role Play
Activity 1

Gather students around a terminal, explain that you will be acting as the Specialist and ask for a volunteer to act as the first customer.

Give the customer a copy of a **BILL** and **ITEM** screens to read from.

Ask the remaining students to observe. Remind them that you will conduct a debrief when the exercise is completed.

Conduct the Exercise

Start the exercise as you see fit. (Ring Ring... announce self)

Customer: "This is (*Mr.Ms.Mrs. read from bill copy*)_____, and I would like some help figuring out my bill."

Specialist: Questions customer:
Access account in BOCRIS.
Analyzes bill and explains charges.

Debrief

Ask students

were customer's questions answered?

Was there an opportunity to sell a plan?

If no, why not.

If yes, what plan would best fit the customer's needs?

What went well?

What needs to be improved?

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Role Play

For these two activities form students into pairs. Have one act as the customer the other as the Specialist. Student/customers should be logged off.

Activity 2	Provide the student/customer with an account bill and instruct the groups to begin. Monitor progress and assist as required.
Debrief	Debrief session. Use questions from first activity.
Activity 3	Reverse roles and provide the student/customer with the third account bill.
Debrief	When complete conduct a debriefing session using the questions from the first activity.

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Suggested Scenarios for Additional Roleplays *Note

Scenario 1	Customer calls to request information on optional calling plans, for their business account. Customer is very distracted and wants only basic information.
Scenario 2	Customer calls and wants to disconnect Optional Calling service from their business service. Before customer disconnects the service they would like to know the cost difference they may notice. Using the previous months bill, provide customer this information.
Scenario 3	Customer calls and wants an explanation of the Optional Calling plans currently on their business account. They were not sure from the original installation what they had so they will need a very basic explanation. Customer is very irritable.
Scenario 4	Customer wants to add Optional Calling plans to all business lines but would like them to be billed separately. Customer is in a big hurry.

*Use live accounts.

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

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CHECKS FOR UNDERSTANDING

OPTIONAL CALLING PLANS

Instructions

Distribute the check for understanding.

Ask students to complete and turn in.

Review results with each student separately. Place in student file.

You may want to conduct a debrief of the Check for Understanding if students have any questions.

Following is the LA version with answers.

Checks for Understanding
Optional Calling Plans.

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

ANS: TW, then depress PF/F2

2. If you need to determine exchanges in the Local Calling area what screen would you access?

ANS: BAMS screen, by entering BAMS on the command line and depressing PF/F7.

What information does this screen provide?

ANS:
1. Available Plans
2. Calling Bands
3. First minute charges
4. Additional minute charges
5. Local or Toll
6. City
7. NPA and NXX.

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PERFORMANCE IMPROVEMENT

Optional Calling Plans

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Optional Calling Plans - Tennessee

Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Tennessee.

Introduction

Optional Calling Plans (OCPs) are specifically designed intercity calling plans applicable to intrastate intraLATA Dial Station-to-Station long distance calls placed during a specified service period.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Circle Calling

Circle Calling offers customer-dialed (DDD) calls to and from IntraLATA exchanges within the customer's pre-subscribed plan. The plan has three options to choose from.

Options

The following chart lists the options available under Circle Calling and their descriptions, USOCs and an S&E example:

Option	Description	USOC	S&E Example
Circle 40 One-Way & Two-Way Calling	Circle 40 includes all exchanges having rate centers within the first five intrastate band (40 miles) is broken down into two plans:		
	One-Way - offers IntraLATA outward station-to-station (DDD) calls originating and terminating within the prescribed circle and is billed on a per-line basis.	OS38B	I1 OS38B
	Two-Way - offers one-way outward calling and incoming calls originating and completed on a direct-dialed basis from a telephone in the prescribed circle to the OCP subscriber's telephone and is billed on a per-line basis.	OS39B	I1 OS34T
Circle 70	This option includes all exchanges having rate centers within the first seven intrastate mileage rate bands (70 miles) and is billed on a per-account basis on customer-dialed (DDD) calls to and from IntraLATA exchanges within the pre-subscribed plan.	OS37T	I1 OS37T
Morristown Area Calling Plan One-Way & Two-Way	Within the Morristown ACP, all DDD calls being placed or received within the first five Intrastate mileage rate bands the discount is 50% on all DDD calls. This plan is available in two options. They are:		
	One-Way - offers IntraLATA outward station-to-station dialed (DDD) calls originating in Morristown and terminating with the prescribed circle.	OC40B	I1 OC40B
	Two-Way - offers outward calling the same as One-Way and also includes all station-to-station (DDD) calling in the reverse direction originated and completed from any telephone in the prescribed circle to the OCP subscriber's telephone.	CC42B	I1 CC42B

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Restrictions

The following restrictions apply to the options available under the Circle Calling Plan.

- Not available for:
  - Dormitory Centrex Service
  - Hospital Patient Service
  - Semi-Public Coin Service
  - Hotel Service
  - Private Line Service
  - WATS Service
- Circle Calling is furnished on account basis only for customers in designated exchanges.

Rates

Since rates are subject to change, they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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One-Way Optional Extended Point-to-Point Calling

Description

The standard One-Way Optional Extended Point-to-Point Calling Plan is furnished only on dial station-to-station calls originating one-way outward from the subscribers telephone to telephones in the prescribed terminating exchange, exchanges or areas. This plan is restricted to those exchange subscribers when a long distance charge applies to call their county seat exchange because of boundaries involved.

Billing

Customers are billed for a one-hour initial block of calling time per line at a fixed rate. Additional usage is billed on a per-minute basis. This service is offered on an account basis only.

Restrictions

The following restrictions apply to both options of the One-Way Optional Extended Point-to-Point Calling Plan:

- Minimum contract period is one month.
- Customers cannot subscribe to more than one OCP that covers the same time period and area.
- Individual message detail is not provided.

Non-Recurring Charges

A service ordering charge applies when no other work is performed. COLC applies when central office work is required.

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Two-Way Measured Extended Community Calling

Description

The Two-Way Extended Community Calling Plan applies to intrastate dialed station-to-station long distance calls originating from and terminating at pre-subscribed exchanges or areas. This plan also applies to all dialed station-to-station calls in the reverse direction originated by any telephone in the terminating exchange, exchanges, or area and completed as an out-going call to the telephone of the subscriber of the plan.

Billing

This plan is billed at a fixed rate for the initial block of calling time per line. Additional usage, in excess of minimum, is billed on a per-minute basis.

Usage time on calls in both directions will be accumulated and the total time will apply as total usage for the month in which billed.

Restrictions

The following restrictions apply to the Two-Way Measured Extended Community Calling Plan.

- Minimum contract period is one month.
- Customers cannot subscribe to more than one OCP that covers the same time period and area.
- Individual message detail is not provided.

Non-Recurring Charges

A service ordering charge applies when no other work is performed. COLC applies when central office work is required.

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Hernando Reverse Billing Option

The Hernando Reverse Billing Option (HRB) permits customers in Hernando, MS to obtain a Memphis, TN telephone number and have all incoming calls forwarded from Memphis, TN to a Hernando telephone number.

Contact Personnel Participation

Both the Mississippi and the Tennessee Contact Personnel will participate in providing this offering.

The following chart breaks out the responsibilities per state.

State	Action
Mississippi	Mississippi Contact Personnel are responsible for explaining and negotiating HRB with ACP subscribers in Hernando.
Tennessee	Tennessee Contact Personnel are responsible for issuing the necessary service order to establish this option and explain the bill.

Guidelines

The following table list the guidelines Tennessee personnel should follow:

Step	Action
1	Receive fax order information from the Mississippi Contact Personnel
2	Format order for processing
3	Call Line and Number administration (LNA) to obtain the Memphis, TN telephone number. Note: LNA is aware of this plan and will assign telephone numbers from the Memphis Main CG1 (Central Group One) with the following NXXs: 901, 251, 525, 526, 528, 532, 533, 575, 576, 577
4	Call the customer and provide the new number.

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Service Order Entries

The following service order entries are required for Hernando Reverse Billing.

Section	Entry	Information
Ident. Section	TN	Assigned by Memphis, TN LNA
Ident. Section	EX	Memphis, TN Main
Ident. Section	AC	The automatic completion decision should be "Y." The decision in the RMKS Section will be NFW.
Ident. Section	SR	The System Request Code will be AO.
Ident. Section	RC	The Routing Code will be "M".
Ident. Section	CS	The class of service will be: RBOBB
Ident. Section	DD	The Due Date is two business days.
Ident. Section	LN	The listed name may be listed or non-listed or non-pub at the customer's request. There is no charge for this listing with this option.
Ident. Section	LA	The listed address is the same as the Hernando, MS address with the following exceptions: - the city & state are listed - Memphis, TN tele. # indicator ex: /TN XXX-XXXX
Ident. Section	DZIP	The zip code is the zip code for the Hernando, MS address.
Ident. Section	DEL	There is no physical location for this number in Memphis.
Ident. Section	IBN1-IPO	Since this option is only available to Hernando customers who subscribe to ACP, the bill section is to be formatted just like the MS ACP account.
Ident. Section	ICI	Should include the MS account number as other service NOTE: A MS Service Ordering - No Premis Visit (SO-NPV) charge applies and will be manually rated by TN.
Ident. Section	BTN	A Billing Transfer Number is not allowed from TN to MS.

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Section	Entry	Information
S&E Section	RBOBB	The Business access line USOC. Ex: ---S&E I1 RBOBB
S&E Section	SFG	The Simulated Facilities Group with this option is used to monitor an incoming call. The SFG number is obtained through the LNA and is the first entry following the USOC RBOBB. Ex: ---S&E I1 RBOBB/SFG 012
S&E Section	CFN	The Call Forwarding Number is the number that follows this FID and is the number where the calls are to be forwarded. Ex: ---S&E I1 RBOBB/SFG 012/CFN 601-555-6789
S&E Section	GSZ	The Group Size Number is the number of lines or access paths provided with this option. Note: initially only single access paths are available Ex: I1 RBOBB/SFG 012/CFN 601-555-6789/GSZ 1
S&E Section	PIC/PCA	Normal PIC and PCA date is required.
Remarks Section	NFW	No Field Word is required to provide this option. Ex: ---RMKS RMK NFW

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Hernando Reverse Billing

To follow is an example of a service order for Hernando Reverse Billing:

BUSINESS ORDER - OR SINGLE ACCESS PATH

XX-XX-XX

901 521-1357
N RBOBB XX-XX-XX

ILN WOODFIN'S SUCCESSFUL BUSINESS/DGN NONE
ILA 100 MAIN STREET, HERNANDO, MS
/TN XXX-XXXX (MEMPHIS, TN TEL #)
ZIP 98765
YPH AA00030
SIC XXXX

--DIR

DEL 0

--BILL
BN1 CHRISTAIN WOODFIN DBA
BN2 WOODFIN'S SUCCESSFUL BUSINESS
BA2 100 MAIN STREET
PO HERNANDO MS 98765
CI SO EST 1980 HM 601-7676 OS 901 521-1357 TRT CHRISTY
CC B
TAR 123,456 (USE MEMPHIS TAR)
SS (1) 342-10-4567)
NRSC 24 50 (I.A.)

--S&E
1 RBOBB/SFG 023/CFN 601-521-9888/GSZ 1/PIC XXX/PCA BO,XX-XX-XX

--RMKS
MK NFW

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Non-Recurring Charges

When applicable, Mississippi service order charges apply to the new connect to establish the HRB

A non-recurring initial Service Ordering is applicable only if it is the only work the MS customer is having done.

Restrictions

The following restrictions apply to the Hernando Reverse Billing Plan.

- A Memphis, TN telephone number must be assigned to the service order establishing HRB.
- Other Central Office services, such as Custom Calling Features are not available with this option.
- While HRB can be forwarded to a Ring Master number, it cannot be part of the Ring Master Service.
- Calls to HRB numbers that are used primarily for business purposes will be forwarded only to a business service number.
- Only one call can be forwarded at a time.

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Hernando Reverse Billing Business Ordering Form

To follow is an example of the transmittal form that the Mississippi specialist will fill out and fax to Tennessee.

HERNANDO, MISSISSIPPI REVERSE BILLING BUSINESS ORDERING FORM

MISSISSIPPI AREA CALLING PLAN
TELEPHONE NUMBER _____
MEMPHIS ORDER
LISTED NAME _____

LISTED ADDRESS _____

MEMPHIS TELEPHONE NUMBER/SPG _____

YELLOW PAGE LISTING/SIC _____

DZIP _____

BILL ADDRESS _____

ZIP CODE (DZIP): _____

CREDIT INFORMATION (type of ownership obs # res, contact, if corporation show officers): _____

_____

_____

CREDIT CLASS _____

CIRCLE ONE IBI WSO INRSC 2450

MISSISSIPPI ACP ORDER NUMBER AND DUE DATE _____

MISSISSIPPI CONTACT PERSONNEL: _____

NAME _____

TELEPHONE NUMBER: _____

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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

Saver Service (WatsSaver)

Saver Service is a set of specifically designed toll Optimal Calling Plans applicable to intrastate long distance calls originated and terminated in the customer's home calling zone/LATA and to intrastate long distance automated or operator assisted calling cards originated and terminated intrastate, IntraLATA.

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are:

- Business Budgeting Plan
- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

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Business Budgeting Plan

Definition	The Business Budgeting Plan customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.
Billing	Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

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Options

The table below lists the options available under the Business Budgeting Plan with descriptions, USOCs and examples of each:

Option	Description	USOC	Example
A1	120-minute (2 hr) minimum, per account	OSW02	I1 OSW02/TA 00, XX-XX-XX
B	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
C	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TA 00, XX-XX-XX
D	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
E	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX
F	6,600-minute (110 hr) minimum, per account	OSW11	I1 OSW11/TA 00, XX-XX-XX
G	15,000-minute (250 hr) minimum, per account	OSW50	I1 OSW50/TA 00, XX-XX-XX

Minimum Contract Time

The minimum contract time for option one is one month. The minimum contract for options B-G is one year.

Restriction

The following restrictions apply to the Budgeting Plan.

- Partial billed to numbers (BTNs) are not eligible for this service.
- Full BTNs of accounts will be billed in the same RAO.
- Customer may not subscribe to more than one OCP that covers the same time period and area.
- Individual message detail provided (not optional)

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Aggregate Plan

The Aggregate Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	then . . .
5000 hours or more	refer them to Premis Marketing!
less than 5000 hours	discuss the Budgeting Plan with them.

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

Student handout

SB504
FOR ALL STATES

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CHECKS FOR UNDERSTANDING

Optional Calling Plans

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

   _____ and depress _____.

2. If you need to determine exchanges in the Local Calling area what screen would you access?

   _____ and depress _____. What information does this screen provide

   1. _____
   2. _____
   3. _____
   4. _____
   5. _____
   6. _____
   7. _____

Student Name: _____

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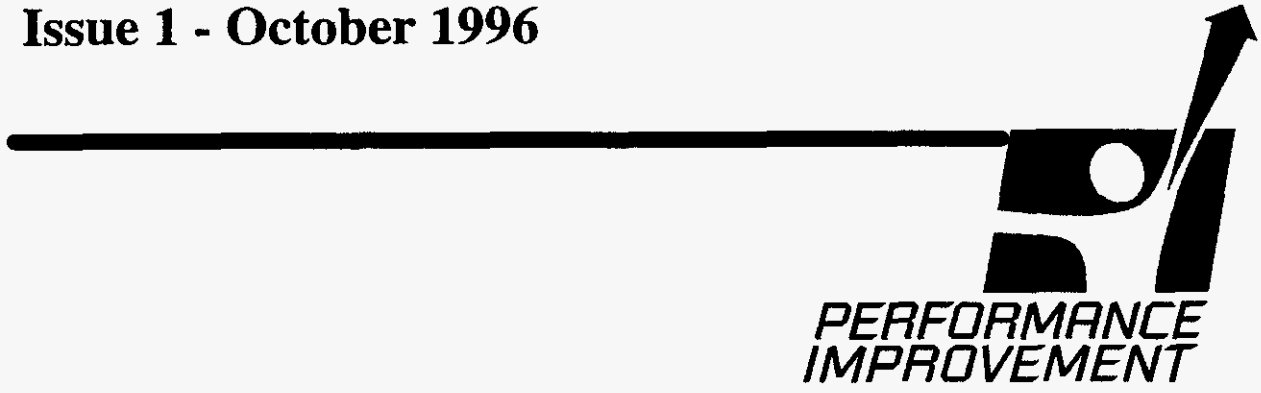
LA.

TN.

BELLSOUTH®

Optional Calling Plan-TN SB504

Learning Advisor Guide
Issue 1 - October 1996



Optional Calling Plans

SB504

Learning Advisor Guide

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Optional Calling Plans - Tennessee

Objectives

At the end of this lesson, the students will be able to:

- Explain Optional Calling Plans.
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service.

Advance Preparation

The following advance preparations will be necessary for class:

- Select live accounts with IntraLATA calls for students to use during terminal practice.
- Study this training material and be familiar with OCPs.
- Make overheads of the objectives and plans (available in the Presentation Aids section of this LAG).
- Create an order for each type of service to be used as a guide for you during student practice.

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Supplies and Materials

You will need the following materials listed below:

- Handbook./OLD
- Overhead projector
- Optional - Operating Standards and Tariffs

Students need to bring the following to class:

- OCP section of their Handbook
- Memo pads and pencils

Note to Learning Advisor

This lesson is divided into two handouts to give the specialist a better understanding of the Optional Calling Plans available to small business customers. Your interaction to enhance the learning of the student is very important.

Lead the students through the screens and make sure they understand how these screens help them understand customers' need and advise customers which optional calling plan will best suit the needs of their business.

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Introduction

In your own words, using the overheads you've prepared, explain to the students that our business customers have a choice of several optional calling plans and review the objectives of this lesson.

Practice

At the end of each handout, instruct the students to sign on to the system if they have not already done so.

- Give them the preselected telephone numbers and direct them to analyze the account and issue orders for appropriate plan.
- After the students input the orders, check for accuracy.
- Make sure the orders are canceled.

Business Only

There is no reference in this lesson to residence, trunks or NARs since small business most likely will not be involved with these orders.

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Handout 1

Optional Calling Plans

This lesson reviews the different types of Optional Calling Plans available in Tennessee.

Introduction

Optional Calling Plans (OCPs) are specifically designed toll plans applicable during specified periods.

Course Objectives

At the end of this lesson you will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan.
- Issue orders to add service or change existing service.

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Circle Calling

Circle Calling offers customer-dialed (DDD) calls to and from IntraLATA exchanges within the customer's pre-subscribed plan. The plan has three options to choose from.

Options

The following chart lists the options available under Circle Calling and their descriptions, USOCs and an S&E example:

Option	Description	USOC	S&E Example
Circle 40 One-Way & Two-Way Calling	Circle 40 includes all exchanges having rate centers within the first five intrastate band (40 miles) is broken down into two plans:		
	One-Way - offers IntraLATA outward station-to-station (DDD) calls originating and terminating within the prescribed circle and is billed on a per-line basis.	OS38B	I1 OS38B
	Two-Way - offers one-way outward calling and incoming calls originating and completed on a direct-dialed basis from a telephone in the prescribed circle to the OCP subscriber's telephone and is billed on a per-line basis.	OS39B	I1 OS34T
Circle 70	This option includes all exchanges having rate centers within the first seven intrastate mileage rate bands (70 miles) and is billed on a per-account basis on customer-dialed (DDD) calls to and from IntraLATA exchanges within the pre-subscribed plan.	OS37T	I1 OS37T
Morristown Area Calling Plan One-Way & Two-Way	Within the Morristown ACP, all DDD calls being placed or received within the first five Intrastate mileage rate bands the discount is 50% on all DDD calls. This plan is available in two options. They are:		
	One-Way - offers IntraLATA outward station-to-station dialed (DDD) calls originating in Morristown and terminating with the prescribed circle.	OC40B	I1 OC40B
	Two-Way - offers outward calling the same as One-Way and also includes all station-to-station (DDD) calling in the reverse direction originated and completed from any telephone in the prescribed circle to the OCP subscriber's telephone.	CC42B	I1 CC42B

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Restrictions

The following restrictions apply to the options available under the Circle Calling Plan.

- Not available for:
  - Dormitory Centrex Service
  - Hospital Patient Service
  - Semi-Public Coin Service
  - Hotel Service
  - Private Line Service
  - WATS Service
- Circle Calling is furnished on account basis only for customers in designated exchanges.

Rates

Since rates are subject to change, they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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One-Way Optional Extended Point-to-Point Calling

Description

The standard One-Way Optional Extended Point-to-Point Calling Plan is furnished only on dial station-to-station calls originating one-way outward from the subscribers telephone to telephones in the prescribed terminating exchange, exchanges or areas. This plan is restricted to those exchange subscribers when a long distance charge applies to call their county seat exchange because of boundaries involved.

Billing

Customers are billed for a one-hour initial block of calling time per line at a fixed rate. Additional usage is billed on a per-minute basis. This service is offered on an account basis only.

Restrictions

The following restrictions apply to both options of the One-Way Optional Extended Point-to-Point Calling Plan:

- Minimum contract period is one month.
- Customers cannot subscribe to more than one OCP that covers the same time period and area.
- Individual message detail is not provided.

Non-Recurring Charges

A service ordering charge applies when no other work is performed. COLC applies when central office work is required.

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Two-Way Measured Extended Community Calling

Description

The Two-Way Extended Community Calling Plan applies to intrastate dialed station-to-station long distance calls originating from and terminating at pre-subscribed exchanges or areas. This plan also applies to all dialed station-to-station calls in the reverse direction originated by any telephone in the terminating exchange, exchanges, or area and completed as an out-going call to the telephone of the subscriber of the plan.

Billing

This plan is billed at a fixed rate for the initial block of calling time per line. Additional usage, in excess of minimum, is billed on a per-minute basis.

Usage time on calls in both directions will be accumulated and the total time will apply as total usage for the month in which billed.

Restrictions

The following restrictions apply to the Two-Way Measured Extended Community Calling Plan.

- Minimum contract period is one month.
- Customers cannot subscribe to more than one OCP that covers the same time period and area.
- Individual message detail is not provided.

Non-Recurring Charges

A service ordering charge applies when no other work is performed. COLC applies when central office work is required.

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Hernando Reverse Billing Option

The Hernando Reverse Billing Option (HRB) permits customers in Hernando, MS to obtain a Memphis, TN telephone number and have all incoming calls forwarded from Memphis, TN to a Hernando telephone number.

Contact Personnel Participation

Both the Mississippi and the Tennessee Contact Personnel will participate in providing this offering.

The following chart breaks out the responsibilities per state.

State	Action
Mississippi	Mississippi Contact Personnel are responsible for explaining and negotiating HRB with ACP subscribers in Hernando.
Tennessee	Tennessee Contact Personnel are responsible for issuing the necessary service order to establish this option and explain the bill.

Guidelines

The following table list the guidelines Tennessee personnel should follow:

Step	Action
1	Receive fax order information from the Mississippi Contact Personnel
2	Format order for processing
3	Call Line and Number administration (LNA) to obtain the Memphis, TN telephone number. Note: LNA is aware of this plan and will assign telephone numbers from the Memphis Main CG1 (Central Group One) with the following NXXs: 901, 251, 525, 526, 528, 532, 533, 575, 576, 577
4	Call the customer and provide the new number.

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Service Order Entries The following service order entries are required for Hernando Reverse Billing.

Section	Entry	Information
Ident. Section	TN	Assigned by Memphis, TN LNA
Ident. Section	EX	Memphis, TN Main
Ident. Section	AC	The automatic completion decision should be "Y." The decision in the RMKS Section will be NFW.
Ident. Section	SR	The System Request Code will be AO.
Ident. Section	RC	The Routing Code will be "M".
Ident. Section	CS	The class of service will be: RBOBB
Ident. Section	DD	The Due Date is two business days.
Ident. Section	LN	The listed name may be listed or non-listed or non-pub at the customer's request. There is no charge for this listing with this option.
Ident. Section	LA	The listed address is the same as the Hernando, MS address with the following exceptions: - the city & state are listed - Memphis, TN tele. # indicator ex: /TN XXX-XXXX
Ident. Section	DZIP	The zip code is the zip code for the Hernando, MS address.
Ident. Section	DEL	There is no physical location for this number in Memphis.
Ident. Section	IBN1-IPO	Since this option is only available to Hernando customers who subscribe to ACP, the bill section is to be formatted just like the MS ACP account.
Ident. Section	ICI	Should include the MS account number as other service NOTE: A MS Service Ordering - No Premis Visit (SO-NPV) charge applies and will be manually rated by TN.
Ident. Section	BTN	A Billing Transfer Number is not allowed from TN to MS.

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Section	Entry	Information
S&E Section	RBOBB	The Business access line USOC. Ex: ---S&E I1 RBOBB
S&E Section	SFG	The Simulated Facilities Group with this option is used to monitor an incoming call. The SFG number is obtained through the LNA and is the first entry following the USOC RBOBB. Ex: ---S&E I1 RBOBB/SFG 012
S&E Section	CFN	The Call Forwarding Number is the number that follows this FID and is the number where the calls are to be forwarded. Ex: ---S&E I1 RBOBB/SFG 012/CFN 601-555-6789
S&E Section	GSZ	The Group Size Number is the number of lines or access paths provided with this option. Note: initially only single access paths are available Ex: I1 RBOBB/SFG 012/CFN 601-555-6789/GSZ 1
S&E Section	PIC/PCA	Normal PIC and PCA date is required.
Remarks Section	NFW	No Field Word is required to provide this option. Ex: ---RMKS RMK NFW

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Hernando Reverse Billing

To follow is an example of a service order for Hernando Reverse Billing:

```
BUSINESS ORDER - OR SINGLE ACCESS PATH

                                                          XX-XX-XX
901 521-1357
N              RBOBB                                  XX-XX-XX

ILN   WOODFIN'S SUCCESSFUL BUSINESS/DGN NONE
ILA   100 MAIN STREET, HERNANDO, MS
/TN XXX-XXXX (MEMPHIS, TN TEL #)
ZIP   98765
YPH   AA00030
SIC   XXXX


--DIR


DEL   0


--BILL
BN1   CHRISTAIN WOODFIN DBA
BN2   WOODFIN'S SUCCESSFUL BUSINESS
BA2   100 MAIN STREET
PO    HERNANDO MS 98765
CI    SO EST 1980 HM 601-7676 OS 901 521-1357 TRT CHRISTY
CC    B
TAR   123,456 (USE MEMPHIS TAR)
SS    (1) 342-10-4567)
NRSC   24 50 (I.A.)


--S&E
1     RBOBB/SFG 023/CFN 601-521-9888/GSZ 1/PIC XXX/PCA BO,XX-XX-XX


--RMKS
MK    NFW
```


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Non-Recurring Charges

When applicable, Mississippi service order charges apply to the new connect to establish the HRB

A non-recurring initial Service Ordering is applicable only if it is the only work the MS customer is having done.

Restrictions

The following restrictions apply to the Hernando Reverse Billing Plan.

- A Memphis, TN telephone number must be assigned to the service order establishing HRB.
- Other Central Office services, such as Custom Calling Features are not available with this option.
- While HRB can be forwarded to a Ring Master number, it cannot be part of the Ring Master Service.
- Calls to HRB numbers that are used primarily for business purposes will be forwarded only to a business service number.
- Only one call can be forwarded at a time.

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Hernando Reverse Billing Business Ordering Form

To follow is an example of the transmittal form that the Mississippi specialist will fill out and fax to Tennessee.

HERNANDO, MISSISSIPPI REVERSE BILLING BUSINESS ORDERING FORM

MISSISSIPPI AREA CALLING PLAN
TELEPHONE NUMBER _____
MEMPHIS ORDER
LISTED NAME _____

LISTED ADDRESS _____

MEMPHIS TELEPHONE NUMBER/SPG _____

YELLOW PAGE LISTING/SIC _____

DZIP _____

BILL ADDRESS _____

ZIP CODE (DZIP): _____

CREDIT INFORMATION (type of ownership obs # res, contact, if corporation show officers): _____

_____

_____

CREDIT CLASS _____

CIRCLE ONE IBI WSO INRSC 2450

MISSISSIPPI ACP ORDER NUMBER AND DUE DATE _____

MISSISSIPPI CONTACT PERSONNEL: _____

NAME_____

TELEPHONE NUMBER: _____

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How to Analyze Your Customers' Account

Analyzing Customers' Account

To be able to recommend the most cost-effective plan to your customer, you will need to analyze their current account.

Step	Action
1	Access the customer's account.
2	Find existing toll calls to exchanges in the OCP area.
3	Type AMT by the calls and depress F/PF6 key. Result: Message line will give you the total plus tax Note: this has to be done page by page

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Handout 2

Long Distance Applicable OCPs

Introduction

BellSouth is generally perceived as the high-cost provider in the marketplace. These plans will let our customers know that we can creatively meet their needs for lower cost toll service without sacrificing quality, reliability or convenience.

We are not attempting to be the lowest priced vendor, but to reduce the price differential between ourselves and our competitors. This reduces the incentive for our customers to move to competitors.

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Saver Service (WatsSaver)

Saver Service is a set of specifically designed toll Optimal Calling Plans applicable to intrastate long distance calls originated and terminated in the customer's home calling zone/LATA and to intrastate long distance automated or operator assisted calling cards originated and terminated intrastate, IntraLATA.

Saver Service was created to provide a competitively priced offering to those customers most vulnerable to competition. These customers provide a significant portion of our revenue stream. There are two different plans available under Saver Service. They are:

- Business Budgeting Plan
- Business Aggregated Plan

Availability & Offering

This service is available to individual Line Service and Remote Call Forwarding Service. It is offered on an account basis only and partial billed BTN's are not allowed.

Business Budgeting Plan

Definition

The Business Budgeting Plan customers billing options that allows them to use up to the initial block of time (specified in the option chosen) of toll calling per account for a fixed monthly rate.

Billing

Usage exceeding the initial block of time based on the option chosen by the customer will be prorated based on the rate of the initial block. Usage is determined for each call based on minutes and tenths of minutes with a minimum call duration of 30 seconds.

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Options

The table below lists the options available under the Business Budgeting Plan with descriptions, USOCs and examples of each:

Option	Description	USOC	Example
A1	120-minute (2 hr) minimum, per account	OSW02	I1 OSW02/TA 00, XX-XX-XX
B	300-minute (5 hr) minimum, per account	OSW05	I1 OSW05/TA 00, XX-XX-XX
C	600-minute (10 hr) minimum, per account	OSW10	I1 OSW10/TA 00, XX-XX-XX
D	1,500-minute (25 hr) minimum, per account	OSW25	I1 OSW25/TA 00, XX-XX-XX
E	3,600-minute (60 hr) minimum, per account	OSW60	I1 OSW60/TA 00, XX-XX-XX
F	6,600-minute (110 hr) minimum, per account	OSW11	I1 OSW11/TA 00, XX-XX-XX
G	15,000-minute (250 hr) minimum, per account	OSW50	I1 OSW50/TA 00, XX-XX-XX

Minimum Contract Time

The minimum contract time for option one is one month. The minimum contract for options B-G is one year.

Restriction

The following restrictions apply to the Budgeting Plan.

- Partial billed to numbers (BTNs) are not eligible for this service.
- Full BTNs of accounts will be billed in the same RAO.
- Customer may not subscribe to more than one OCP that covers the same time period and area.
- Individual message detail provided (not optional)

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Disconnecting If a customer calls to disconnect, check the TA date. The table below outlines the steps that follow:

If the TA date . . .	then . . .
is not expired	issue order in HC status and change order to CP when due date corresponds to contract data.
corresponds with the contract date	issue order to disconnect

Rates Since rates are subject to change they are not included in this lesson. Current rates can be located in your Handbook or OLD.

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Aggregate Plan

The Aggregate Plan is specifically designed for customers who generate a high volume of toll usage. This plan is negotiated by Premis Marketing.

High-Volume Calling

Following is a table to assist you if a customer calls in questioning a plan for high-volume calling.

Analyze the customers accounts and

If the customer has . . .	**then . . .**
5000 hours or more	refer them to Premis Marketing!
less than 5000 hours	discuss the Budgeting Plan with them.

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Saver Service Screen

The Saver Service Screen

The Saver Service Screen is available to give you all the information you need to make a plan recommendation for your customer. This screen will allow you to see total messages, total minutes and total charges. It will also suggest the best plan for the customer and tell you if the plan will result in savings for that customer.

Accessing the Saver Service Screen

The table below will walk you through the steps to access the Saver Service screen.

Step	Action
1	Access the customer's account.
2	Type "TW" on the message line and depress the F/PF2 key.
3	Depress F/PF8 to scroll forward through the screens

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Presentation Aids

Objectives

At the end of this lesson, the student will be able to:

- Explain Optional Calling Plans
- Analyze customers' accounts and be able to present the best plan to customers.
- Issue orders to add service or change existing service

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Optional Calling Plans Available in Tennessee

- Circle Calling
- One-Way Optional Extended Point-to-Point Calling
- Two-Way Measured Extended Community Calling
- Hernando Reverse Billing Option
- Saver Service

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ROLE PLAYS

FOR

OPTIONAL CALLING PLANS

LEADER'S GUIDE
FOR ALL STATES

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ROLE PLAY

Scenario

CUSTOMER CALLS FOR AN EXPLANATION OF CHARGES ON BILL.

Three Role Play Activities

1. LA acts as Specialist to model behavior, student is customer
2. Students act as customer and Specialist
3. Customer and Specialist change roles

Preparation

Select three (3) live accounts for students to analyze billing. These accounts do not have to fit any special profile for Optional Calling Plans as the focus is on analyzing the account billing.

Make copies of the Bill and Items screens to be used by the student/customer.

Debrief

Debrief after each activity

Were the customer's questions answered?

Was there an opportunity for selling a plan?

If no - Why not?

If yes - what plan and why would it fit the customer's needs.

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First Role Play
Activity 1

Gather students around a terminal, explain that you will be acting as the Specialist and ask for a volunteer to act as the first customer.

Give the customer a copy of a **BILL** and **ITEM** screens to read from.

Ask the remaining students to observe. Remind them that you will conduct a debrief when the exercise is completed.

Conduct the Exercise

Start the exercise as you see fit. (Ring Ring... announce self)

Customer: "This is (*Mr.Ms.Mrs. read from bill copy*)_____, and I would like some help figuring out my bill."

Specialist: Questions customer:
Access account in BOCRIS.
Analyzes bill and explains charges.

Debrief

Ask students

were customer's questions answered?

Was there an opportunity to sell a plan?
If no, why not.
If yes, what plan would best fit the customer's needs?

What went well?

What needs to be improved?

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Role Play

For these two activities form students into pairs. Have one act as the customer the other as the Specialist. Student/customers should be logged off.

Activity 2	Provide the student/customer with an account bill and instruct the groups to begin. Monitor progress and assist as required.
Debrief	Debrief session. Use questions from first activity.
Activity 3	Reverse roles and provide the student/customer with the third account bill.
Debrief	When complete conduct a debriefing session using the questions from the first activity.

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Suggested Scenarios for Additional Roleplays *Note

Scenario 1 Customer calls to request information on optional calling plans, for their business account. Customer is very distracted and wants only basic information.

Scenario 2 Customer calls and wants to disconnect Optional Calling service from their business service. Before customer disconnects the service they would like to know the cost difference they may notice. Using the previous months bill, provide customer this information.

Scenario 3 Customer calls and wants an explanation of the Optional Calling plans currently on their business account. They were not sure from the original installation what they had so they will need a very basic explanation. Customer is very irritable.

Scenario 4 Customer wants to add Optional Calling plans to all business lines but would like them to be billed separately. Customer is in a big hurry.

*Use live accounts.

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CHECKS for UNDERSTANDING

FOR

OPTIONAL CALLING PLANS

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CHECKS FOR UNDERSTANDING

OPTIONAL CALLING PLANS

Instructions

Distribute the check for understanding.

Ask students to complete and turn in.

Review results with each student separately. Place in student file.

You may want to conduct a debrief of the Check for Understanding if students have any questions.

Following is the LA version with answers.

Checks for Understanding
Optional Calling Plans.

1. After reviewing a customer's account Bill and Item screens you would then enter what command to see the OPTIMAL CALLING PLAN recommended for the customer.

ANS: TW, then depress PF/F2

2. If you need to determine exchanges in the Local Calling area what screen would you access?

ANS: BAMS screen, by entering BAMS on the command line and depressing PF/F7.

What information does this screen provide?

ANS:
1. Available Plans
2. Calling Bands
3. First minute charges
4. Additional minute charges
5. Local or Toll
6. City
7. NPA and NXX.

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LAG

PARTNERS
PREPARING
PEAK
PERFORMERS[SM]

SB305C - BAS

THE NEW CONNECT

Lessons 1 - 13

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INTRODUCTION TO THE NEW CONNECT

Learning Advisor Guide
SB305C - Lesson 1
BAS
November 1995

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Introduction to the New Connect

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Estimated Time: 2 Hours

Outcomes:

Upon completion of this lesson, students will:

- Understand and apply the three rules of formatting
- Recognize the seven sections of a SONGS order
- Identify the SONGS screens of a New Connect order

Advance Preparation:

Locate (in "live" pending orders) a simple new connect order. Print a copy for each student. Select a "real" definite address for use during the Terminal Interaction activity. Provide instructions to students during the "walk-through" as appropriate. Notes are included as a guide, but may not be all-inclusive.

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Note to the Learning Advisor:

This course assumes a working knowledge of SONGS and COFFI. See SB300C, a prerequisite course.

Supplies & Materials:

*On-line documentation • Handout

Introduction *(In your own words)*

When a customer applies for new service, it could mean the customer:

- has never had telephone service anywhere
- has had telephone service before, but a new application is necessary (previous service was out of state, outside of South Central Bell territory, etc.)
- has service now but it cannot be transferred to a new address and a new application is necessary

Once you determine that the customer needs new telephone service you will take a New Connect order. You will assure the customer that he/she has reached the right person to handle the request. Ask for permission to obtain the necessary information to establish this service for your customer.

Beginning a New Connect Order

Advise students: In this lesson you will be typing your first N order. This will be just an overview. You are not to be concerned with the data that will be entered on the screens at this time. What you should concentrate on is recognizing the different screens, the sequence of the screens and the SONGS commands and function keys you will be using.

Discuss the outcomes of the lesson.

Note to Learning Advisor Regarding Terminal Interaction:

This exercise is intended to give a brief overview of the SONGS N order. You will be walking students through an entire order. While giving the instructions on the following pages, keep explanations and discussions as brief as possible.

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Each student should perform terminal actions individually at his/her own terminal.

It would be helpful to demonstrate inputting an N order prior to the individual terminal interaction. Have all students gather around one terminal while you enter an N order as they observe.

One of the most common mistakes students will make during this exercise is entering a message line command and not spacing out characters from a previous message. To save time, you will need to remind them to space after each message line command.

Before you begin, make sure all students know the location of these keys:

- F12
- F8
- ENTER
- CURSOR TAB

Handout

Instruct students to read the entire handout. Explain that they will be given more detailed information about what you just demonstrated.

Discuss the "New Connect Format" training aid. Explain that this outlines the sequence of steps which were taken in the order you just completed. Suggest that they keep this aid in a place that is easily accessible so that it may be used with future lessons. Review the training aid with students before going on to the next lesson.

Terminal Interaction

Instructions to Students:	**Learning Advisor Notes:**
Enter the SONGS command SO,NB(space) from the message line of a blank BOCRIS ready screen.	Explain (SO,NB)
Depress ENTER to access the SO,N AD screen.	Briefly explain the address screen.

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Enter contact name in the CN field.	*Advise students that if they make typing mistakes, they may use the arrow keys to reposition the cursor and over-type with corrections.*
Depress cursor tab. Enter address ***(from your advance prep)*** in the ADDR field.	Prompt students to populate the COM and ZIP fields also.
Depress F8 to access the SO,N LST screen.	Provide a brief explanation of this screen. Point out the message line **RSAG REQUEST SENT** response.
Use the cursor tab to position the cursor in the ILN field. Enter the Listed Name - last name comma space first name.	
Depress F8 to access the SO,N CR screen.	Provide a brief explanation of this screen. Point out the message line response - PREM MATCH, but do not access RSAG/ORION until credit screen entries have been completed.
The cursor is located in the ISS (Social Security number) field. Enter your social security number in the ISS field (without dashes).	Explain the "Y, "N" and "X" required for SSN consent. Explain situations where multiple SS#s are entered. Explain format: **XXX-XX-XXXX;Y, N or X**
Use the cursor tab to position cursor in the ICI field.	Briefly explain credit information. Advise ICI entries for verified good credit.
Use the cursor tab to position cursor in the ICC field. Briefly explain credit classes. Enter "B" in the ICC field. Depress S/R or ENTER. This will store data entered on the CR screen.	You may prefer to instruct students to go to the message line. This would also be the time to check previous or other service by using: **/NPANXXLINE** and PF/F1.
Depress F12 to access a BOCRIS entry screen. Check other service or former service.	Point out details.

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Move cursor to the HOME position. Enter SO,GB. Depress PF/F12 to return to the order in progress.	Briefly explain SO,GB.
At the HOME position enter =PREM(space).	
Depress ENTER to access the SO,N AD screen for RSAG/ORION output.	Provide a brief explanation of this screen.
Enter "AA" (Accept Address) command. Depress F8 to return to the SO,N CR screen.	Point out that entries made in **listing** and **credit** sections have been moved to the right side of the screen and are now highlighted. Point out that data populated by RSAG is on the left side of the screen.
Depress F8 to access the COFFI Basic Services Screen.	Briefly review this screen.
Enter "X" in the OPT field for Class of Service/Touchtone.	Point out message line instructions.
Depress ENTER.	
Use the cursor tab to enter "I" in OPT field for basic services.	Point out message line instructions. Request 1FB, TTB & SEQ1X.
Depress F1 to access the Carrier (PIC) screen.	**Point out the Disclosure Statement.**
Use the cursor tab and enter "I" to select a carrier.	
Depress F1 to access the Custom Calling screen. Briefly explain this screen).	
Use the cursor tab and enter "I" for selected services.	Point out message line instructions. Request CF, SC8, 3WC, CW or whatever (make it simple).
Depress F5 to review.	Explain Review screen and its function for changes/corrections.

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Depress F8 to access the SO,N SE screen.	Briefly explain that no entries are necessary for this order, etc
Depress F8 to access the SO,N RMK screen.	
Return to the HOME position. Enter TNS;RATE(space)	Advise appropriate Remark screen entries: DDA, DEL, IIB, ACC, ZCBR, RMK, RMKR, etc.
Depress ENTER	Point out message line "REQUEST FOR TNS SENT." Explain recap and verify order using F10 and F11. Point out rates, non-recurring and recurring. Provide a brief explanation of quoting rates.
Depress ENTER	Point out that ?????? marks in TN field have been replaced with a telephone number. Point out that the due date is now available. Ask for any questions, discuss as appropriate.
Return to the HOME position. Enter CAN(space). Depress ENTER.	Point out message line response - "NEGOTIATION CANCELLED." Advise students they will use PF/F6 instead of canceling when taking an order from a "real" customer. Briefly explain the function of PF/F6.
Depress F12 to return to the BOCRIS entry screen	Advise students they will now log off.
Depress pause key. Enter /RCL at HOME position. Depress ENTER.	

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Conclusion

Explain that this terminal exercise was **intentionally** brief. This exercise was just to give them the "big picture." The following lessons will provide detailed information and more practice.

Building a Personal Training Aid

At this point, you should encourage your students to begin building a personal training aid. To get them started, you should begin to develop the training aid on an easel sheet. Keep it updated and posted at all times. As each step is identified, have the students note their training aids. Analyze each step to be sure it is the most efficient. The training aid should include all actions necessary **including local requirements**.

Encourage active participation of all students. This exercise will provide step-by-step instruction on what to say and what to do on each screen.

Here is an example of a training aid. It is in generic format. Again, **you must include any local requirements.**

SCREEN	WHAT YOU DO	WHAT YOU SAY
ENTRY	Respond to the customer's opening statement. Access SONGS SO,NB S/R or ENTER	I'll be glad to handle this for you
Address (SO,N AD)	Enter: CN ADDR COMM or ZIP F8	I want you to be very pleased with the service you order. I would like to ask you some questions. Will that be okay? What is your address?
Listing (SO,N LST)	Enter: Listed Name Additional Listings (i.a.) Bill Information (i.a.)	How would you like your service listed in the directory? Tell me who else will be sharing the service.

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New Connect Training Aid

A New Connect Training Aid is included in the student handout. As you are aware, students often feel a little more secure when they have a piece of paper to use as a prompt when going for an "On-Job" session. A copy of the pre-formatted student New Connect Training Aid is included below. It is suggested that students not use it during the Terminal Interaction in this lesson because some steps may be sequenced a little differently; however, it is included here for you to use at your discretion.

STEPS/NEGOTIATION	ENTER	DEPRESS	RESPONSE
CUST: "I need to place an order for new service." YOU: "I'll be glad to help you."	SO,NB on the message line from any BOCRIS screen	F12, ENTER	SO,N AD SCREEN
Ask for name of person placing order.	Customer name in the CN field	Tab	
"What is the address where you want this service to be connected?" (Get additional info if indefinite - i.a.)	Address in the ADDR field City in COM field and/or Zip codein ZIP field	Enter F8	
Negotiate listings: * "You are entitled to a free listing in the white and yellow pages. How would you like your listing to appear in the directory?" * "In the yellow pages,, under what heading would you like to appear?" Discuss additional listings	Listing as desired in LN field YPH and SIC (refer to headings handbook to determine YPH and SIC codes)	F8	SO,N LST SCREEN RSAG REQUEST SENT
Determine billing name and address	Name in IBN1 field with billing address in the IBA2, IBA3 fields (i.a.)	F8	SO,N CR SCREEN PREM MATCH or PREM NO MATCH
Discuss credit information: * Sole ownership, partner- ship or corporation * Date business established * Type of business * OBS/RES # * TRT *SSN(s) "Would it be alright with you if we share your social security # with the long distance carrier you choose?"	SSN - with or without dashes Information in ISS field *If yes:* 123121234; Y,, CUST NAME *If no:* 123121234;N,, CUST NAME	Cursor tab ENTER	Credit screen entries stored

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STEPS/NEGOTIATION	ENTER	DEPRESS	RESPONSE
Verify credit by checking bills of other service or Cross Reference File.	NPANXXXXXX(sp) or CRN,CUST NAME+(sp) or CRL,CUST NAME+(sp) or CRS,SS#	F2 (other svc) F4 (CRL) F4 (CRS)	customer bill screen (i.a.) "X" by choice, F4 Cust account "X" by choice, F4 Cust account
Return to order (i.a.)	SO,GB	F12	return to SO,N CR SCREEN
Determine credit class	ICC "B," "C" or "D" using local procedures to determine	HOME then type: =PREM depress ENTER	RSAG/ORION OUTPUT SCREEN
Review RSAG/ORION output	"AA" at HOME position	F8	SO,N CR SCREEN
Negotiate services	Follow instructions displayed in COFFI to select Class of Service, carrier and other services.,	F5 any corrections/ additions F8	COFFI REVIEW SCREEN SO,S&E SCREEN
No entry required for most single line orders		F8	SO,N RMK SCREEN
Request TN	Enter TNS; at HOME position	ENTER	
Negotiate directory delivery and # of dirs	IDDA data LA, BA or other address (i.a.)	cursor tab	
Negotiate due date	Due date in DD field if different from pre-populated data RMK FID (i.a.) *OPB **required** *ZCBR **required**	cursor tab ENTER ENTER	 ATLAS REQ SENT Rates displayed
"I have all the info I need, now. Just let me take a moment to verify everything." Get agreement from customer.		ENTER	
Advise of TN and DD (and mailing of brochures,, i.a.)			
Recap/verify entries **Make Optional Services disclosures**	any changes	F10 & F11 to scroll	
Express appreciation		F6	SVC ORD COMP

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RSAG/ORION and ADDRESS INPUT

Learning Advisor Guide
SB305C - Lesson 2

BAS

November 1995

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RSAG/ORION & Address Input

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ESTIMATED TIME: 3.5 HOURS

Outcomes:

After completing this lesson, students will be able to:

- negotiate and format address screen entries for definite and indefinite addresses.
- demonstrate understanding of the function of RSAG/ORION relating to address input.

Materials/Supplies:

Handout

OLD

Advance Preparation:

Locate "real world" addresses to use for Terminal Interaction & Rehearsal included in this lesson. Be sure to choose **definite, descriptive** and **indefinite** addresses.

Be prepared to model the behavior you expect during the Terminal Interaction & Rehearsal exercise.

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Introduction

This lesson will provide you with the basics of negotiating and formatting the address information for a new connect order. As you learned before, SONGS is the system you will use to input orders. The first screen in a SONGS new connect order is the SO,N AD (address) screen. This screen is also your access via SONGS to the RSAG (**R**egional **S**treet **A**ddress **G**uide) system.

RSAG and SONGS are two separate systems. SONGS is used for service order input. RSAG is used to verify address information and is a very important component of the service order process for several reasons:

- RSAG address verification allows us to make sure that our records are correct and that telephone service is being installed at the proper address. This is especially important in areas where a road or street is known by more than one name to local residents. This verification process is commonly called *"validation."*

- Correct RSAG address validation insures that E911 records are accurate so that help will be available in an emergency, regardless of street name or house number conflicts which might otherwise cause delay.

Let's stop here for just a moment and talk about 911 and how what you do affects it's accuracy and how important a "link" you are in the "chain" connecting every customer with fire, police, ambulance and paramedic emergency assistance.

Suppose you are the administrator of a retirement home and the fire alarms have just gone off. From the appearance of the smoke coming out of the left wing of the building you feel your only chance to save the residents of the wing is your access to 911.

Another scenario: a customer in your corner card shop has just collapsed in the aisle and is unable to speak. Frantically, you dial 911.
Although these real life emergencies happen many times every day in cities all over the country, we tend to take for granted that help will be available immediately when we dial 911.

Now, let's consider what's going on at the other end of an emergency call. A specially trained 911 dispatcher is attempting to calm the usually distraught caller while at the same time determining where the customer is calling from and trying to dispatch the appropriate emergency personnel. In most instances, obtaining the address of the calling party would not be a problem, but what about the case of the customer that has collapsed. Just as the shop owner tells the dispatcher what the problem is, his customer groans and the owner drops the phone to run over and check on the customer.

This may not seem like a big deal, but it is!

- What kind of help would be available if the address had to be provided by the caller?

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How do you think you'd get help for the retirement home that's on fire down the street if it's a secluded area and you have no idea what the address is.

Many municipalities are now enhancing 911 (Enhanced or E911) so that emergency personnel now have access to address information that was formerly only available inside our company, information that was supplied to various systems by Specialist input. Along with this new capability, it becomes even more important that the address information you "feed" to the Address Information Center (AIC) on a service order be accurate, complete and in agreement with the RSAG addressing system administered by the AIC.

Demonstration

- Gather all students around one terminal. Keep explanations brief as you demonstrate the following:

- Log on to BOCRIS.

- Display the BOCRIS entry screen.

- Move the cursor to the HOME position on the message line.

- Enter SO,NB(space).

- Depress F12 or ENTER.

The SO,N AD screen is displayed. The screen says "REQ PREM."

- Enter Mary Jones in the CN field.

- Depress the cursor tab to position the cursor at the ADDR field.

- Enter a "real world" address of your choice in the ADDR field. You may want to use your own address, particularly if it is a definite street address.

- Depress the cursor tab to position the cursor at the COM field. An entry is required in this field when the ZIP or TN is unknown.

- Enter the COMMUNITY name.

- Depress the cursor tab to position the cursor at the ZIP CODE field.

- Enter the zip code for the address you entered in the ADDR field. An entry is optional in this field when the community name is entered.

- Depress F8.

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The SO,N LST screen is displayed.

- Point out the message line response RSAG REQUEST SENT.
- Move the cursor to the home position on the message line.
- Enter CAN.
- Depress ENTER.
- Depress F12.

Handout

Distribute the handout; instruct students to read the entire handout, taking time to review any handbook pages as directed and to perform all terminal practices.

Be available to assist and answer questions. When all students have completed the handout discuss the Training Aid found on the last page of the material (a copy of which is attached to this document for your convenience).

Question & Answer Activity *(optional)*

- Divide students into two teams. Have each team develop as many questions as they can pertaining to what they've just learned. Allow about 5 minutes prep time.
- Allow the teams to decide how they will challenge each other.
- Be available to make sure that correct answers are given to the questions provided. This may also offer additional opportunities for you to clarify and reinforce what the class has just learned.

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Terminal Interaction & Rehearsal

Pair students into teams. Each pair should rehearse at least four situations, reversing roles so that each student will have the opportunity to respond as the customer and as the specialist.

These rehearsals should be conducted simultaneously. Students should perform all associated terminal actions during each contact. If you feel it is necessary, ask for a volunteer from among the students and model the behavior you expect during this rehearsal.

All contacts should begin from the moment the telephone rings. This will allow students to practice not only what they have just learned, but *it will also reinforce responding to the customer's opening statement.*

The following customer names and opening statements may be used for student rehearsals, or you may want to develop your own list of names and "real" addresses along with an appropriate opening statement.

Remind students to enter the "CAN" command after each exercise.

Richard Abbott	This is Richard Abbott. I need to order new service. My bookstore will be located at 602 Alamo Drive in Universal.
Suzanne Jennings	Hello, this is Suzanne Jennings and I want to place an order. I need a telephone connected at 3512 Eiderdown Rd. in Anytown. I will be opening my own accounting firm.
Bill Duggan	Hello, this is Mr. Duggan. I want to order new telephone service. I'll be opening a law office at 515 Main St. in Happyville.
William Johnson	This is Bill Johnson. I just built a new building and I need to get telephone service run to it. It's at 6410 Smiley Rd. in Gurnseyville.
Kara Glover	Hi, this is Kara Glover. I need service for my new tanning salon at 312 Lester St., Maple Corner.
Sharon Ragland	This is Ms. Ragland and I need new service. I'm opening a pet shop at 811 Dunbar St. in Greenville.

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Eddie Jacobs	I am Eddie Jacobs. I need to order telephone service for my new business. I have a welding shop on Old Shell Road in Mobile.
Susan Holt	This is Susan Holt. I want to order new service. I'm opening a catering business soon at Brookside Mall, Suite A-1.
Johnnie McCombs	I want to place an order, please. I want a telephone in my bike shop at 4181 Raceway St.
Andy Taylor	This is Sheriff Taylor. I need to order service for our new jailhouse. It's on Main Street in Mayberry.
Joseph Anderson	Mr. Anderson speaking. I want new telephone service installed in the Green Acres Trailer Park office. That's Lot 1

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ADDRESS SCREEN TRAINING AID

Type of Address	Fields Requiring Data	Questions to Ask
DEFINITE (Numbered)	ADDR COM or ZIP LOC (i.a.)	"In what city will your service be located?" "May I have your street address,, please?"
INDEFINITE (Descriptive) (Unnumbered)	ADDR COM or ZIP LOC (i.a.) plus ***at least one*** of the following: RT/BOX TN or LN STATUS*	"Where will your service be located? "Do you have a street address that would help me locate the trailer park?" "Do you know the former customer's name or telephone number?"
INDEFINITE (Unnamed)	ADDR COM ZIP STATUS (X) and ***any other information*** it is possible to obtain, such as: RT/BOX TN or LN	"What city or community are you near?" "Do you have any other information that might help me locate your area?"

NOTE: RSAG requires at least three fields of data to search for an indefinite address.

*An "X" in the STATUS field is required if only the ADDR and ZIP fields contain data on an INDEFINITE address.

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LISTINGS

Learning Advisor Guide
SB305C - Lesson 3

BAS
November, 1995

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LISTINGS

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Introduction 1

Handout 1

YPH & SIC Activity 1

Learning Partner Exercise 2

Terminal Interaction & Rehearsal .....

Training Aid .....

ESTIMATED TIME: 7 HOURS

Outcome

At the conclusion of this lesson, students will be able to:

- Identify fields and associated data in the Identification section.
- Negotiate and format listings.

Advance Preparation

- Print a copy of a SONGS S0,N LST screen. You will need one copy for each student.
- Prepare a list of YPH and SICs to be used in the YPH & SIC activity (page 3).
- Reproduce case information for Learning Partner Exercise and Terminal Interaction.
- RSAG does not recognize Training Database addresses at the present time. For this exercise you will go no further than sending an address for validation. You may, however, find it easier to use "real world" addresses for the Rehearsal exercise.

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Materials & Supplies

- On-Line Documentation
- Easel Paper
- Handout

Introduction

This lesson will teach you the basics of negotiating and formatting the listing information for new connect orders.

Obtaining accurate information is vitally important, not only to satisfy the requirements outlined in the Performance Standards, but, even more important, to make sure we give every customer the listing that suits their needs.

Correct negotiation and service order format of listings will prevent directory errors and allow our customers to obtain accurate directory assistance information.

Handout

Distribute Handout along with copies of the SO,N LST screen (from your Advance Preparation). Advise the students to read the entire handout, reviewing all Handbook or OLD pages as directed, and to perform all terminal practices as they are instructed.

Be available to assist and answer questions.

YPH & SIC Activity

You may find it helpful to first give students a brief walk-through of the YPH book in on-line documentation, making sure that each student knows how to locate YPH & SIC information.

Next, lead the following activity:

Tell students that you will give them a specific YPH. They, in turn, must tell you the location of that heading in the on-line documentation and provide the correct SIC.

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Learning Partner Exercise

Divide students into learning pairs. Distribute the case information on the following page. Have one student give instructions while the other student performs terminal actions. Roles should be reversed so that each student will have an opportunity to practice.

Have students begin each case with SO,NB so that they will input the address as well as the listing. Remind the students to cancel each contact before going on to the next.

Be available to assist and answer any questions which may arise.

Remember that it may be easier to use "real world" addresses due to the present limitations of the Training Database.

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CN: David O'Malley
LN: O'Malley David realtor
YPH: Real Estate
SIC: ?
LA: XXX Terrace St

CN: Carolyn O'Conner
LN: Carolyn's Pretty Petals
YPH: Florists
SIC: ?
LA: XXX Princeton Av SW

CN: Terry Jones
LN: Superior Trophy taxidrmst
YPH: Taxidermists
SIC: ?
LA: XXX 20th St

CN: Richard McGuire
LN: McGuire's Auto Repair
YPH: None
SIC: ?
LA: University Blvd

CN: Bill Thomas
LN: Thomas William B III CPA
YPH: Accoutants-Certified Public
SIC: ?
LA: XXX Cross Creek Dr

CN: Kenneth Miller
LN: Kleen Up Inc bldg mtce
YPH: Building Maintenance
SIC: ?
XL: Miller Kenneth ofc
LA: Highway 98

CN: Bubba Barnes
LN: Barnes Eddie (Bubba) bonds
YPH: Bail Bonds
SIC: ?
LA: XXX Vail Av

CN: Marie Taylor
LN: Just Us Bloomers florist
YPH: Florists
SIC: ?
LA: XXX Vista Ln

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LA Role-play

Purpose:

Allow participants to practice system input and negotiation skills.

Directions:

Explain to participants that this activity will allow all of them to practice system input. The Learning Advisor will act as the customer and ask for volunteers or choose one participant to act as the specialist. Explain that the specialist is to stay in their role as much as possible. If they need to check on information the specialist should ask to place their customer on hold to break the role-play. The Learning Advisor starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. All other participants will practice system input only. Once the role-play is complete the Learning Advisor will debrief and answer any questions.

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Participant Roleplays A & B

Purpose:
Allow participants to practice system input and negotiation skills.

Directions:

This next section is an activity that will allow you to practice system input and negotiation skills. This will consist of a role-play where the class will break into pairs. You should use the addresses assigned to you when acting as the customer. Each participant will have the chance to role-play as a customer and as a specialist. (Example: Role-play A the participant will act as a customer, Role-play B the same participant will act as the specialist). You may use any training aids throughout the role-play. When acting as the specialist you are to stay in your role as much as possible. If you need to check on information you should ask to place the customer on hold to break the role-play. The participant acting as the customer starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. Advise the Learning Advisor when you have completed Role-play A. Once the role-play is complete, the Learning Advisor will debrief, verify system input and answer any questions. The participants should now switch roles and continue with Role-play B. Once Role-play B is complete the Learning Advisor will debrief and answer any questions.

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Roleplay A

CN: John Davidson
LN: Davidson Sign Co
XL: Davidson John ofc
YPH: Signs
LA: Highway 78

CN: Henry Taylor
LN: Graphics Inc graphics desgnr
YPH: Graphic Designers
LA: XXX Dolomite Dr

CN: Clarence Hines
LN: Hines Clarence acct
YPH: Accountants-Public
LA: XXX Montevallo Rd

CN: Daryl Hopkins
LN: Hopkins' Day Care
YPH: Child Care Centers
LA: XXX College Hill Rd

CN: Karen Arnold
LN: Karen's Bridal Shop
YPH: Bridal Registries
LA: University Blvd

CN: Gail Hodges
LN: Sweet Tooth The Bakers
YPH: Bakers
LA: XXX Tuscaloosa Av SW

Roleplay B

CN: Michael Brennan
LN: Brennan & Assoc tax consltnts
XL: Brennan Michael ofc
YPH: Taxes-Consultants
LA: XXX 20th St SW

CN: Julie Roberts
LN: The Ceramic Shop
YPH: Ceramic Products-Decorative
LA: XXX Cahaba Trail

CN: Samantha Brown
LN: Hilltop Lounge
YPH: Cocktail Lounges
LA: Highway 25

CN: Bob McDonald
LN: McDonald Johnson & Kovak
XL: McDonald Robert atty
XL: Kovak Stanley atty
XL: Johnson William atty
YPH: Attorneys
LA: XXX Carr Av

CN: Deidra Jenkins
LN: Maid Right maid serv
YPH: Maids & Butlers Service
LA: XXX Dugan Av

CN: Tommy Stevenson
LN: Sports Unlimited sporting gds
YPH: Sporting Goods
LA: XXX 18th St SW

Training Aid (Optional)

Before going to the next lesson you should encourage students to add to their personal training aids. You will also need to update the one posted in the classroom, if appropriate.

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BILLING NAME AND ADDRESS

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Billing Name And Address

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Lesson Practice. 3

Check for Understanding, administering 4

Check for Understanding with answers 5

Estimated Time: 1 Hour

Outcomes:

At the conclusion of this lesson, students will be able to:

- Determine when a formatted Billing Name and Address is necessary on a New Connect order.
- Correctly format the Billing Name and Address.

ADVANCE PREPARATION

- Print a copy of a SONGS order for each student with the following situations:

- Fully formatted Billing Name and Address (IBN1, IBA2, IPO).

- Order showing the message line flag **"FORMAT BNA"** generated because LN/LA exceeds the 20 character allowance.

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INTRODUCTION

This lesson will acquaint you with the Billing Name and Address entries used in the Bill section of a service order. You will also learn how to apply the rules of formatting billing entries.

From an earlier lesson, you learned the following FIDs are used to format entries for the Billing Name and Address. These same FIDs are also used in the Bill Section of the service order. This information enables Comptrollers to mail customers' bills:

BN - **B**illing **N**ame

BA - **B**illing **A**ddress

PO - **P**ost **O**ffice Information

STRESS: It is extremely important for addresses to be formatted correctly. Improperly addressed mail causes delays in customers' receipt of bills and delays the receipt of payments.

Distribute Handout and have the students read in its entirety. Answer any questions students may have.

* * * * *

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Learning Advisor Demonstration

Gather the students around a terminal. Demonstrate entering the following situations. Answer any questions the students have.

Example 1: Billing Name and Address is the same as the Listed Name and Address. Remember, information which appears in parentheses and capitalization rules do not apply to the Billing Address.

Example 2: Billing Address is different from the Listed Address. PO is the same as the exchange in the Identification Section.

Note: It is not necessary to type in the IPO in this case. When you accept the address from RSAG, the system will automatically enter the IPO information.

Example 3: Listed Name and/or Address exceeds 20 characters and the Billing Name and Address must be formatted.

Example 4: Order placed by the sole owner Hosea Ramirez with the business name of Ramirez Food. The billing address is P O Box 961, Anytown, US 12345.

Example 5: Business name with the bill going to the attention of Accounting.

Example 6: An address containing a Rural Route number. If secondary street name information is used, it should be placed above the delivery address line.

EX: Bryan Dairy Rd
Rt 2 Box 28

* * * * *

Lesson Practice

Board several names and local addresses. These will be used by the students in this practice. Be sure to include all the different situations taught in this lesson.

Assign students Learning Partners. Have them take turns acting as the customer and the Specialist. The person playing the part of the Specialist should start the contact by asking for the billing name and address. After getting this information, the Specialist should end the contact by saying, "Thank you. I have the information that I need."

* * * * *

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CHECK for UNDERSTANDING

PURPOSE: To measure participant comprehension at specific intervals.

DIRECTIONS:

Allow students to review Check for Understanding directions in the Handout.

Ephasize that students are to work independently.

Allow 10 minutes to complete.

DISTRIBUTE CFUs.

Monitor students.

COLLECT CFUs.

As students finish, collect for scoring and filing.

Record scores on trend sheets.

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CHECK for UNDERSTANDING

DIRECTIONS:

Answer all questions. You are allowed to use OLD/Training Aids that are available. Time allotted for this Check for Understanding is 10 minutes. The Learning Advisor will collect CFUs when completed. The Learning Advisor will lead a discussion and provide the correct answers after completion.

FILL IN THE BLANKS:

1. The BN,BA and PO fields are limited to ___**20**___characters.

2. The address where the service is installed is called the__**SERVICE**___ address.

3. When the customer wants as address other than the service address listed in the directory, you must____**OVERTYPE**_____ the preferred address in the __**LISTED**____ address field.

CIRCLE TRUE or FALSE:

4. True or **False:** A customer must have their address included in their directory listing.

5. True or **False:** Orion will map a customer's BN and BA information back to SONGS.

USE SPACE PROVIDED:

6. List two reasons why it is so important to have a correct service address on a service order

   1. _____**Access to E911 service.**_____

   2. _____**We would hook up service to wrong address.**

This concludes lesson 4.

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470.0600

November 1, 1995

ATTACHED:	Course SB305C for BAS Lesson 5, Credit. Lag in its entirety (Dated 11/95) Handout in its entirety (Dated 11/95)
CANCELS:	Course SB305C - Lesson 5, Credit Lag - in its entirety (Dated 4/94) Handout - in its entirety (Dated 4/94)
INCLUDES:	Typographical edits. This lesson incorporates all methods and procedures available though November 1, 1995. Any changes occurring after that time will be added in future revisions.
ADDITIONS"	Check for Understanding.
EFFECTIVE DATE:	Upon receipt.
RESPONDENT:	Elaine Ware (404) 321-8564

CREDIT

Learning Advisor Guide
SB305C BAS Lesson 5

November 1995

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Credit

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Check for Understanding. 9

Estimated Time: 6.5 Hours

Outcome:

At the conclusion of this lesson, students will be able to:

- Process credit information.
- Compute deposit amounts.
- Verify previous or other service (inside and outside BellSouth).
- Correctly assign credit classes.
- Correctly enter the information obtained on the credit screen of a SONGS new connect order.

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Advance Preparation:

Determine if your state honors Bank Letters of Credit, Surety Bonds, etc.

Materials/Supplies:

Easel paper/markers.

Introduction

(Briefly explain in your own words):

We need to obtain credit information on all customers to whom we extend credit. When applying for credit with most companies, you are required to fill out an application or questionnaire.

Concept of Credit

When customers apply for telephone service with BellSouth, they are actually applying for unlimited credit. There are certain questions that we must ask concerning the type of business and previous/other business service a customer may have or have had.

Ask students and board answers:

If you were the credit manager, what information do you feel would be needed from a customer applying for a new car loan? A Master Card?

NOTE: Prompt students to develop all necessary information.

Divide students into groups of two and have each group role-play this scenario:

One person should act as the credit manager and another as the customer. The customer may be buying a new car, applying for a loan, obtaining a credit card, etc. Have the student role-playing the credit manager list the information he/she thinks would be pertinent to making a decision regarding the "customer's" credit-worthiness.

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Distribute Handout

Have students read pages 1-13. Once they have completed the reading assignment address any questions the class may have regarding types of ownership or securing accounts.

Refer students to the Handbook or OLD pages dealing with credit classes and the deposit formula. Discuss as appropr iate. You may want to board the deposit formula and demonstrate.

Discuss rules and requirements for the following (as shown in the Handbook or OLD):

- Surety Bonds
- Bank Letter of Credit
- Advance Payments

Reading Bills

Explain to the students why previous or other telephone service is the most significant factor in evaluating the possibility of risk. It is the best indication of the customer's willingness and ability to pay a telephone bill.

Every effort should be made to obtain pertinent information while the customer is on the line. If you are unable to verify while the customer is on the line, verify as soon as possible. (If the local practice varies, explain how this is handled in the the area for which you are instructing.)

Credit Evaluation and Credit Information

Board the most common abbreviations and their meaning:

PSVS	Previous Service Verified Satisfactory
PSVU	Previous Service Verified Unsatisfactoy
PSOR	Previous Service Outside Region
PSLT	Previous Service Less Than One Year
PSNAV	Previous Service Not Able to Verify
OSVS	Other Service Verified Satisfactory

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OSVU	Other Service Verified Unsatisfactory
OS	Other Service Currently Working
OSOR	Other Service Outside Region
NPS	No Business Service
OBS	Other Business Service
SO	Sole Ownership
CORP	Corporation
AGCY	Agency
HO	Home Office
VP	Vice President
T	Treasurer
ORS	Other Residence Service
PTR	Partnership
FRNCHS	Franchise
DLRSHP	Dealership
P	President
S	Secretary

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Board and Explain:

All customers will be asked if they have had previous or other telephone service for a period of one year or more within the BellSouth region.

When the answer is yes, they will need to furnish you with:

- Telephone Number
- City and State
- Date Service Was Disconnected

Demonstration:

For this exercise, pre-select live local accounts. Advise students to call up the accounts on their terminals. As a refresher, point out the following:

- Treatment history.
- Dishonored check history.
- Date of installation.
- Credit class.
- Amount of tolls.
- Amount of local service.

Student Exercise:

Have students practice computing deposits on these accounts as appropriate.

NOTE: As a variation, pre-select live local accounts, print out and distribute to the students for analysis and deposit computation.

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Handbook/OLD

- Refer students to the Handbook or OLD pages that show how to access the DDRG screen. Do not discuss at this time.

- Explain and demonstrate the SO,GB command for returning to the order once another screen has been accessed.

Credit Screen

Have students read pages 14-20. Board and discuss the following list of credit information items:

- Type of ownership.

- Type of business (if applicable).

- Principals (partners, officers, etc.).

- Year established.

- Billing party/contact number.

- Social Security number(s) of principals.

- Drivers license number(s) of principals*.

- Landlord/relative.

- Other previous (Business/Public) service.

NOTE: Some states have local agreements with the police department/department of motor vehicles to verify this information. Explain if your state does not obtain all these items or obtains the information in a different sequence.

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Partnership Exercise

Pair students and have them take turns performing the functions they've learned while telling their partner what they are doing. You may use live accounts or, you may select from among the scenarios in the next part of this guide. The purpose of the exercise is to allow students an opportunity to gather the necessary information from the customer and at the same time, to translate the information into order format. Remind students that they will be expected to:

- Ask appropriate questions to develop complete and accurate credit information.
- Access the DDRG screen to locate a telephone number for a distant telephone company (if appropriate).
- Check the social security, listed name, and billed name cross-reference files.
- Obtain consent from the billing person(s) to provide the social security number(s) to the long distance carrier of record.
- Assign a proper credit class.
- Quote a deposit *(or other form of security)* using the formula outlined in this lesson (if appropriate).
- Enter all necessary information on the credit screen of the SONGS N-order.

Rehearsal Scenarios
(optional)

Situation 1:

Customer's name is Bill Smith. He is opening a new shoe repair business in Anytown. He has had previous business service in Anytown, but it has been some time ago. He had residence service when he lived in Utah for the past three years, but he worked for someone else and did not have business service in his name.

Situation 2:

Mary Jones calls to say that she has just bought "The Beauty Box," a local beauty salon which has never had a telephone. Ms. Jones has residence service that she shares with her husband, but has never had business service before. She volunteers that she is a good customer of her bank, and that the bank has agreed to sign a letter of credit so she won't have to pay a deposit.

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Situation 3:

General Electric is opening a new plant in town. Everybody in town is excited that they will able to buy light bulbs that were made by their friends and relatives right here in Anytown! Sue Wilson, administrative assistant to the regional manager, John Doe, calls to place an order for one line that will be used in the office while the plant is being completed. Ms. Wilson gives the telephone number 101 555-XXXX as one of several numbers GE has "everywhere". She doesn't have Mr. Doe's social security number, but will be happy to call back later and add it to the order.

Situation 4:

Sam Kenney has decided that he wants to put a telephone in the office of his junkyard business, Sam's Parts and Stuff. He has "been in business at this location for 25 years and has done fine without a telephone all this time, but with the competition breathing down his neck" he has decided he needs to modernize. He has residence service in Anytown at telephone number 101 555-XXXX.

DISTRIBUTE **Check for Understanding**

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CHECKS for UNDERSTANDING

DIRECTIONS:

Answer all questions. Your are allowed to use OLD/Training Aids that are available. Time allottted for this Check for Understanding is 10 minutes. The Learning Advisor will collect CFUs when completed. The Learning Advisor will lead a discussion and provide correct answers after compotion.

SCORING:

Each question is worth 20 points. This may be revised later when more CFUs have been added to other lessons.

FILE:

Collect CFUs when completed and place in drop file. Record scores on Trend sheets, if used.

DISCUSS:

Discuss CFUs, answer questions.

.A copy of the HO CFUs with answers follows on the next page.

This conclude lesson 5

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CHECK for UNDERSTANDING

Answer all questions. Your are allowed to use OLD/Training Aids that are available. Time allottted for this Check for Understanding is 10 minutes. The Learning Advisor will collect CFUs when completed. The Learning Advisor will lead a discussion and provide correct answers after compotion.

1. What does NPS indicate in the ICI field?

   ANS NO PREVIOUS SERVICE.

2. What command must be entered to return to the order once another screen has been accessed?

   ANS SO,GB

3. The standard formula for calculating a deposit is:

   ANS 2 months' local service plus (+) 2 months' estimated toll usage, rounded to the nearest $5.00.

4. To check for previous service by Social Security number you would:

   ANS Enter CRS,XXXXXXXXX and depress PF/F4

5. What class of credit would a new customer receive whose credit is unknown and there is no indication of risk.

   ANS C

When completed, turn in to your Learning Advisor.

Please hold your questions until all students have completed their Check for Understanding.

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RSAG/ORION OUTPUT

Learning Advisor Guide
SB305C BAS- Lesson 6

BAS
November, 1995

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RSAG/ORION OUTPUT

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Handout	3
Directions Activity *(Optional)*	3
Terminal Interaction & Rehearsal *(Optional)*	3
FCTN Training Aid *(copy of student material)*	4
How to Assign an AHN *(copy of student material)*	5

Estimated Time: 6.5 Hours

Outcomes:

At the conclusion of this lesson students will be able to:

- access, interpret and accept RSAG/ORION output
- obtain and format driving directions correctly
- recognize the need for and assign an AHN

Materials/Supplies:

- Terminals
- Handouts
- On-Line Documentation

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Advance Preparation:

There are ten (10) Terminal Interactions in the Handout. Because this lesson cannot be state-specific and because Training Data Base addresses will not work in the RSAG environment, you will need to locate "real" addresses for the state in which you are instructing.

Practice 1	a definite street address that will yield the response **PREM MATCH**
Practice 2	a definite street address that gives the response **PREM NO MATCH**
Practice 3	another definite street address that gives the **PREM MATCH** response and takes students through the step that gives the message **END 0000 COMPLETED SUCCESSFULLY**
Practice 4	an address where students will obtain a hit on a definite address with living unit (supplemental) information
Practice 5	a descriptive (either number or unnumbered) - an apartment complex or trailer park using a vacant apartment or lot number.
Practice 6	use an indefinite address where students can obtain a hit using an FCTN which you provide
Practice 7	address valid but no living unit exists (your best bet here is a ***very*** old part of town where there is no info in RSAG except that it is a recognized address)
Practice 8	**ADDRESS INFORMATION ONLY/ASSIGN AHN** is the output message we're going for here. We suggest an unnumbered street or road with several GSG possibilities and no FCTN data available
Practice 9	a legitimate street name with ST instead of RD or vice versa. Output needs to show **NO EXACT MATCH ON STREET NAME**
Practice 10	Desired output is **NO MATCH ON HOUSE NUMBER OR AHN**

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Introduction

You already know that RSAG/ORION and SONGS are two different systems. SONGS is used for service order input. RSAG is used to validate address information. ORION is simply the name of the interface between the two systems.

In this lesson you will learn how to interpret the data RSAG/ORION provides once you've requested it and how to access the appropriate output and "map" it to your order.

Handout

Instruct students to read the entire handout, performing all terminal practices and reviewing all handbook pages as directed. It is suggested that you give the class all address information prior to beginning the handout. Be available during the lesson to assist and answer questions.

Directions Activity *(Optional)*

Divide students into pairs. Have them practice giving and receiving driving directions. Give these suggestions as guidelines:

Giving	Receiving
*Give directions to your business	*Use good abbreviations
*Be specific but brief	*Format correctly - ILOC DES (XXXXX XXX) (maximum of 102 characters including spaces and parentheses)

Terminal Interaction & Rehearsal *(Optional)*

- Divide the students into pairs. Each pair should reverse roles so that each student will have the opportunity to respond as the customer and as the specialist.

- You may want to use some of the same "real" addresses you gathered for your Advance Preparation. Direct students to adlib customer information.

- All contacts should begin from the moment the telephone rings. This will allow the students to respond to the customer's opening statement.

Remind students to cancel each order before going on to the next.

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If you feel it is necessary, ask for a volunteer from among the students and model the behavior you expect during this rehearsal.

Training Aid

Obtain the FCTN from RSAG or customer and enter appropriate code set:

If RSAG indicates	And status is	And customer advises	Then Format FCTN as
Previous Service (PS)	Non-Work	→	NPA NXX-XXXX;D
PS	Pending out	→	NPA NXX-XXXX;OI*
PS	Working	→	NPA NXX-XXXX;OS
PS	Unknown	Former #	NPA NXX-XXXX;CPN
PS	Unknown	Nearby (NRBY)	;NNA NRBY NPA NXX-XXXX
PS	Unknown	→	;NNA
New Install	→	NPS	;NEW INST
New Install	→	NPS & NRBY	;NEW INST NRBY NPA NXX-XXXX

RSAG Match

- Verify address data
- If Address only, enter AA to accept
- Depress Enter key or F8

RSAG No Match-Definite Address

- Review similar address data
- Place X before address choice
- Depress Enter key or F3
- If address okay, enter AA, or AA; Code set and depress Enter key or F8

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Indefinite Address-Street Name Found:

- Review address data
- Obtain valid GEOSEG
- GSG Desired must be displayed on screen
- Enter GSG in AHN field and Request AHN or place "X" beside to correct GSG
- Enter AA to accept address
- Depress F8 or Enter key

RSAG No-Match-Indefinite Address:

Verify address with customer: then:

If Address Incorrect	If Address Correct
• Make Correction to address data • Depress Enter key or F8	• Determine all address information and call AIC • Manually enter all address data on order • Enter AA • Depress F8

TO:	ENTER:	DEPRESS:
Accept Address	AA	Enter key or F8
Access Address (AD) Screen	=PREM	Enter key or F8
Access Credit (CR) Screen (N only)	=CR	Enter key or F8
Access Listing (LST) Screen	=LST	Enter key or F8
Access Remarks (RMK) Screen	=RMK	Enter key or F8
Access S & E Screen	=SE	Enter key or F8
Access F Order (FORD) Screen (T & F only)	=FORD	Enter key
Access COFFI Services/Feature Screen	=SF	Enter key or F8
Access TN Main Menu pr Response Screen	=TNS	Enter key

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SERVICE CONNECTION CHARGES

Learning Advisor Guide
SB305C - BAS - Lesson 8

November 1995

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SERVICE CONNECTION CHARGES

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Practice Instructions 5

Self Check Instructions & Answers 5

Handout 3 Instructions 8

Self Check Instructions & Answers 8

LEARNING ADVISOR NOTE:

This lesson on Service Connection Charges has been divided into three sections: Multi-element, Restructured, and Deregulated. Please request that the students complete only the Handouts that are applicable to them.

Handout #1 - Multi-Element Environment - Applies to Georgia, North Carolina, and South Carolina

If the state in which you are training **has not converted** to the restructured environment, then use this handout to train regulated service charges.

In Handout #1, the student will learn about the:

- Service Ordering Charge
- Access Line Connection Charges
  - Central Office Work Charge (CO)

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- New Line Connection Charge (NLC)

- Premises Work Charges (PWC) Regulated
- Premises Visit Charge (PV) [North Carolina ONLY]
- Network Interface (NI)

Handout #2 - Restructured Environment - Applies to Florida and South Central

If the state in which you are training **has converted** to the restructured environment, then use this handout to train regulated service charges.

In Handout #2, the student will learn about the:

- Network Interface
- Categories included in rate structure for regulated charges

- Central Office Work Charge (CO)
- New Line Connection Charge (NLC)
- Central Office Work Charge (CO)
- New Line Connection Charge (NLC)

Handout #3 - Deregulated - Applies to all states

In either case, use this handout to train deregulated service connection charges, as they were not affected by the restructure.

In Handout #3, the student will learn about the:

- Basic Wiring
- Flat Rate Schedule (FRS)
- Jacks
- Deregulated Premise Work Charges (PWC)
- Firm Bids

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- Warranty

Advance Preparation:

- Try to arrange for someone from Network to come out and show your students a Network Interface (in equipment room on the floor of your building) before they begin Handout 3. If this can't be done, try to secure a Network Interface and demonstrate it yourself.

- Be prepared to use a live address and account number for the Practice exercise in Handouts 1 and 2.

- If you are using Handout 2, check your local office of state training or contact the following people for the rates for regulated charges:
  - Linda Gilley for Florida
  - Brendolyn Chamblin for South Central

- Be prepared to provide the students with the answers to the following Self Check questions:
  - Handout 1, questions 1 and 2 and part 2 of questions 8 - 12
  - Handout 2, part 2 of questions 11 - 15

Materials/supplies:

- Easel/Colored Markers

- Handbook or OLD

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LEARNING ADVISOR-LED INTRODUCTION

Briefly provide the students with background information on regulated vs. deregulated items. The information below may be used.

The Federal Communications Commission (FCC) requires that the telephone company provide each customer with a demarcation point to separate the telephone company's network facilities from customer owned premises wiring. It is usually a Network Interface. It is provided to allow the modular connection of premises wire to the access line. Anything on our side of the demarcation point is regulated or tariffed by the Public Service Commission (PSC) - in some states by the Public Utilities Commission - and the FCC. Anything on the customer's side is deregulated/detariffed.

Inside wiring includes all cable, wire, jacks and the associated components located on the customer side of the network interface. The inside wire may be inside or between buildings on the same premises.

Basic wiring includes the inside wiring and jacks located on the customer's side of the demarcation point associated with the business individual or party line service. This excludes service which terminates at a telephone answering service and all services which may terminate in a customer premises communication system (Key, ESSX, etc.).

A good way to remember what is deregulated is to think of it as those items the customer is responsible for arranging or providing.

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HANDOUT 1 & 2 INSTRUCTIONS

At this time, refer the students to Handout 1 (Multi-Element) or Handout 2 (Restructured) and have them read it. After they have read the handout, be sure and answer any questions that the students might have.

Note: If your students are completing Handout 2, check local office for availability of piggybacking and communicate availability status to students.

PRACTICE INSTRUCTIONS

Be available to answer any questions the students may have while completing the practice at the end of Handouts 1 & 2.

NOTE: After the students complete the Practice in Handout 1, request they type "rq" on the Command Line & press enter.

SELF CHECK INSTRUCTIONS & ANSWERS

At the end of Handouts 1 and 2, your students will be asked to answer a few questions. Review the answers they came up with by referring to the sample answers below.

Handout 1 Answers (you will need to provide the students with the local rates for questions 1 and 2. These rates can be located in OLD under:

Overture Reference Book
Service Charges - Tariffed
Description
Monthly Rate

You will also need to provide the students with the answers to part 2 for questions 8 - 12)

1. Rates (find in OLD).

2. Rates (find in OLD).

3. False. DOE will calculate monthly charges as well as service order charges.

4. True.

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5. False. The access line charge covers connecting customers from outside their homes to the central office.

6. True.

7. True.

8. What type charge(s) apply? One First Line and one Additional Line Connection Charge

   What is the total dollar amount of the service connection? _____

9. What type charge(s) apply? Line Change Charge

   What is the total dollar amount of the service connection? _____

10. What type charge(s) apply? Line Change Charge

    What is the total dollar amount of the service connection? _____

11. What type charge(s) apply? If Piggybacking available - no charge; No Piggybacking - Secondary Service Charge.

    What is the total dollar amount of the service connection? _____

12. What type charge(s) apply? Line Change Charge and Premises Work Charges.

    What is the total dollar amount of the service connection? _____

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Handout 2 Answers (you will need to provide the students with the answers to part 2 for questions 11 - 15)

1. Name the four (4) basic connection charges.

   Line Connection Charge
   Line Change Charge
   Secondary Service Charge
   Premises Work Charge

2. Line Connection Charge applies when a new LINE is being connected.

3. Premises Work Charges apply when the CUSTOMER requests that changes be made to the BellSouth side of the demarcation point.

4. When more than one line is being connected for the same customer at the same time and location, what two elements of the Line Connection Charge will apply?

   THE FIRST LINE AND THE ADDITIONAL LINE CHARGES

5. False. The correct charge for changing a RingMaster number is a Line Change Charge.

6. True. We bill a customer a Line Change Charge to suspend the service but we will restore the line at no charge.

7. False. The customer should also be billed a Secondary Service Charge.

8. Answer determined by local tariff.

9. The Line Connection charge covers:

   The cost of issuing the order.
   Making all of the connections.
   Installing the Network Interface.

10. What Charge applies when a customer requests a telephone number change and also wants to add Call Return on their line? A LINE CHANGE CHARGE.

11. What type charge(s) apply? <u>One First Line and one Additional Line Connection Charge</u>

    What is the total dollar amount of the service connection? _____

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12. What type charge(s) apply? Line Change Charge

What is the total dollar amount of the service connection? _____

13. What type charge(s) apply? Line Change Charge

What is the total dollar amount of the service connection? _____

14. What type charge(s) apply? If Piggybacking available - no charge; No Piggybacking - Secondary Service Charge.

What is the total dollar amount of the service connection? _____

15. What type charge(s) apply? Line Change Charge and Premises Work Charges.

What is the total dollar amount of the service connection? _____

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HANDOUT 3 INSTRUCTIONS

At this time, refer the students to Handout 3 and have them read it. After they have read the handout, be sure and answer any questions that the students might have.

SELF CHECK INSTRUCTIONS & ANSWERS

At the end of Handout 3, your students will be asked to answer a few questions. Review the answers they came up with by referring to the sample answers below.

1. A new customer requests one line (1FB) to be installed with 2 standard baseboard jacks. Wiring is in place for one of the jacks. The address has had previous service.

S&E	Rates - Multi-Element	Rates - Restructured
I1 1FB	1 - SOP Charge (R)	1 - Line Connection Charge (R)
/NLC NI	1 - Access Line Charge (R)	2 - RJ11C (D)
I2 RJ11C	2 - RJ11C (D)	1 - 1ST Wire Termination (D)
I1 SCO	1 - 1ST Wire Termination (D)	1 - Additional Wire Termination (D)
I1 VCA	1 - Additional Wire Termination (D)	

2. A new customer requests one line (1FB) to be installed with 3 standard baseboard jacks. This is a brand new house, that has never had service before, there is no wiring in place.

S&E	Rates - Multi-Element	Rates - Restructured
I1 1FB	1 - SOP (R)	1 - Line Connection Charge (R)
/NLC YI	1 - New Line Charge (R)	3 - RJ11C (D)
I3 RJ11C	1 - Access Line Charge (R)	1 - First Wire Termination (D)
I3 VCA	2 - Additional Wire Terminations (D)	2 - Additional Wire Termination (D)
I1 EBN	3 - RJ11C (D)	

3. A new customer places an order for one line (1FB) to be installed. The customer states that all jacks and wiring are in place, and that the people who just moved out had phone service disconnected 2 days ago.

S&E	Rates - Multi-Element Jacks	Rates - Restructured
I1 1FB	1 - SOP (R)	1 - Line Connection Charge (R)
/NLC NI	1 - Access Line Charge (R)	

NOTE: There is no need for the NLC N1 or NLC Y1 FIDs in the Restructured Environment.

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After the students have completed Handout 3, explain in more detail the difference between regulated and deregulated Premises Work Charges. Make sure they understand that if work is being done on the Telco side of the demarcation point, then the work is regulated. If the work is on the customer's side of the demarcation point, it is deregulated. There are separate rate schedules for this work.

NORTH CAROLINA ONLY: Make sure your students understand that they will only apply the PV charge when they are dealing with regulated PWC and not when they are dealing with deregulated PWC. Also, it is important that they understand that the PV charge does not apply when the only work being done on a New Connect or T/F is the New Line Connect Charge.

Have them determine what charges apply in the following situation:

Mary's Auto Repairs wants to put new service in at the garage. The people who owned the service station before only had one jack in the office and Mary wants to add three more: 2 baseboard and 1 wall jack. She wants us to install these jacks and conceal the wire behind the walls.

Information on concealed wiring can be located in OLD at:

Overture Reference Book
Basic Inside Wiring
(Search for) Detariffed - Deregulated

Multi-element (Applies to GA, NC, and SC)

S&E	RATES
I1 1FB /NLC Y1	1 - SOP (Reg)
I2 RJ11C	1 - Access Line Charge (Reg)
I1 RJ11W	3 - Jack Charges (Dereg)
	1 - 1st 15 Minute Increment (Dereg)
	5 - Additional 15 minute Increments (Dereg)

Restructured (Applies to FL and South Central)

S&E	RATES
I1 1FB /NLC Y1	1 - Line Connection Charge (Reg)
I2 RJ11C	3 - Jack Charges (Dereg)
I1 RJ11W	1 - 1st 15 Minute Increment (Dereg)

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5 - Additional 15 minute Increments (Dereg)

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November 1995

ATTACHED:	Course SB305C - BAS - Lesson 9, Service Plan LAG - In its entirety (dated 11/95) Handout - In its entirety (dated 11/95)
CANCELS:	Course SB305C - Lesson 9, Service Plan LAG - In its entirety (dated 6/94) Handout - In its entirety (dated 6/94)
INCLUDES:	Revisions include: Handout and Training Aid include OLD Paths Revised Training Aid format Three Roleplays have been added
	This lesson incorporates all methods and procedures available through November 1995. Any changes occurring after that time will be added to future revisions.
EFFECTIVE DATE:	Upon receipt
RESPONDENT:	Elaine B. Ware, 404-321-8564

SERVICE PLAN

Learning Advisor Guide
SB305C - BAS
Lesson 9

November 1995

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The Service Plan (SEQ1X)

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Distribute Handout 2

Role Plays..... 3

Kentucky and Louisiana Only: Trouble Determination Plan 4

Discuss Training Aid 4

Estimated Time:

Outcome:

- Understand the Service Plan.
- Understand what the Service Plan **does** and **does not** cover.
- Understand when Disclosure Statements are needed.
- Understand the Service Plan concept.

Materials/Supplies:

- Easel
- Colored Markers

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DISTRIBUTE STUDENT HANDOUT

Distribute the Student Handout and have the students read the Handout.

When they have finished, discuss what the Service Plan **does** and **does not** cover. Also discuss the students' responsibilities, the disclosure statement and its importance. Have them locate and review the Service Plan information in their Handbooks and/or OLD.

NOTE:

Discuss warranties with the students. Make certain the students understand that each exchange line on the premises must either subscribe to the Service Plan or each exchange line must have /NMC. The customer must have one or the other, not a combination of both. Also make certain the students understand that the Service Plan is an **optional** service.

In this lesson, the students will learn about the Service Plan and how it appears in SONGS. In the next lesson, they will learn how SONGS does part of the formatting for them.

ROLE PLAYS

LA Roleplay

Purpose:
To allow students to practice system input and negotiation skills

Directions:
- Explain to the students that this activity will allow all of them to practice system input.
- Explain that you will act as the customer and ask for one volunteer (or choose one from the group) to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information, they should ask to place the customer on hold to break the roleplay.
- You should start the roleplay with a call into the Business Office.
- The student acting as the specialist will practice their negotiation skills as well as any necessary system input.
- All other students will practice system input only.
- Once the roleplay is complete, you should debrief this exercise and answer any questions the students have.

LA Role Play Script

Customer's Name:	Annette Andrews Andrews Florist
Address:	Use the address provided to you.
Listing Instructions:	You want one listing - Andrews Florist. Accept a Yellow Page heading of Florists.
Billing Address:	342 Petal Drive Anytown, US 98765
Social Security Number:	???-??-????
Credit Information:	You are the sole owner and have residence service at 222-0505.
Services:	You want a usage-sensitive line (one appropriate for your state), one baseboard jack and one wall jack, the Maintenance Plan, Touch Tone and Call Waiting. You are requesting a restriction to prevent dialing of 900 and 976

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numbers. Carrier will be Sprint.

Student Roleplays A and B

Purpose:
To allow students to practice system input and negotiation skills

Directions:
- Explain to the students that this activity will allow them to practice system input and negotiation skills.
- This will consist of two roleplays requiring the class to break into pairs.
- Students are to use the addresses assigned to them when acting as the customer.
- Each student will have the chance to roleplay as a customer and as a specialist (Example: During Roleplay A the student will act as a customer and during Roleplay B the same student will act as the specialist).
- Students may use any training aids throughout the roleplays.
- Both students should stay in their role as much as possible.
- If the specialist needs to check on information, they should place the customer on hold to break the roleplay.
- The student acting as the customer should start the roleplay with a call into the Business Office.
- The student acting as the specialist will practice their negotiation skills as well as any necessary system input.
- Advise the students to inform you when they have completed Roleplay A.
- Once everyone has completed Roleplay A, you should debrief the exercise, verify system input, and answer any questions.
- Explain that the students should now switch roles and continue with Roleplay B.
- Once Roleplay B is complete, you should again debrief the exercise, verify system input, and answer any questions.

Student Role Play Scripts A and B (Refer to Handout)

Special Note:

In Kentucky and Louisiana, explain the Trouble Determination Plan using the Handbook, OLD, and local Material. In Tennessee, Mississippi and Alabama, make sure your students understand the information on page 3 of the Handout, stating that **there is no charge for Trouble Determination.**

DISCUSS TRAINING AID

Discuss the Training Aid for the Service Plan, pages 12-13 of the Handout. Point out to the students that there are items mentioned in the Training Aid that they will not cover until later in their training. This is a training aid they will be able to use on all orders involving SEQ1X. This lesson only covers SEQ1X in relationship to the New Connect.

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SELECTING A LONG DISTANCE COMPANY

Learning Advisor Guide
SB305C - BAS
Lesson 10

November 1995

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Selecting a Long Distance Company

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Introduction 2

Handout 2

Role Plays 3

Estimated Time:

Outcomes

At the conclusion of this lesson the students will be able to

- Identify the difference between interLATA and intraLATA calls
- Explain PIC to customers
- Describe the choices associated with subscription
- Give accurate information pertaining to carrier selection based on information obtained from COFFI
- Negotiate a PIC selection and map it to a service order

Materials/Supplies

- Terminal
- Handout
- Handbook or OLD
- Local Telephone Directory (one per person)

Advance Preparation

Some years ago Learning Advisors had access to maps of each individual state which showed the LATAs found in that state. If you have one of these maps available, it will be helpful to display it to the class before introducing the handout. *(The latest map available at the time of this writing was dated September, 1990. The form number at that time was BSSM-84-12-KY for Kentucky, BSSM-84-12-TN for Tennessee, etc.).* If this map is not available, students have been instructed in the handout to consult the

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Call Guide pages of the local directory, so it is not critical to the lesson that you have this map.

LEARNING ADVISOR-LED INTRODUCTION

Most of us, whether we even realize it or not, are subscribers to the services of a long distance company or "carrier." This subscription enables us to call outside the SCB Calling Zone where we live. This lesson, which is completely self-paced, will teach you how to explain subscription to your customers, how to determine which carriers are available to any customer based on his/her address, and how you will enter this information on an N order.

There is a practice exercise in the handout which walks you through every screen of the N order sequence that you've learned to this point. This lesson will teach you how to access the Carrier screen in COFFI and how to have SONGS map your selection to the order.

HANDOUT INSTRUCTIONS

Advise students to read the entire handout, perform the terminal practice and review all handbook/OLD pages as directed. Be available to assist and answer questions.

NOTE: If it has not been taught previously (with COFFI and Simple C Orders), this would be a good time to show students the helpful hint of making changes and/or corrections using the Review Screen (PF/F5) in COFFI. This will be helpful in instances when customers have a "change of heart" during order negotiation. This feature is particularly useful when USOCs have a good bit of floated information because it cuts down on re-typing time.

Before going on to the next lesson students should be encouraged to add to their personal training aids. You will also need to update the one posted in the classroom, if you have begun one.

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ROLE PLAYS

LA Roleplay

Purpose:
To allow students to practice system input and negotiation skills

Directions:
- Explain to the students that this activity will allow all of them to practice system input.
- Explain that you will act as the customer and ask for one volunteer (or choose one from the group) to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information, they should ask to place the customer on hold to break the roleplay.
- You should start the roleplay with a call into the Business Office.
- The student acting as the specialist will practice their negotiation skills as well as any necessary system input.
- All other students will practice system input only.
- Once the roleplay is complete, you should debrief this exercise and answer any questions the students have.

LA Role Play Script

Customer's Name:	Jan Bundy Artistic Alterations
Address:	Use the address provided to you.
Listing Instructions:	You want one listing - Artistic Alterations. Accept a Yellow Page heading of Alterations.
Billing Address:	Same as above address.
Social Security Number:	???-??-????
Credit Information:	You are the sole owner and have residence service at 478-0565.
Services:	You want flat rate service, Touchtone, Call Waiting, the Maintenance Plan and one calling card. You want MCI as your carrier. All wiring and jacks are in place.

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Student Roleplays A and B

Purpose:
To allow students to practice system input and negotiation skills

Directions:

- Explain to the students that this activity will allow them to practice system input and negotiation skills.
- This will consist of two roleplays requiring the class to break into pairs.
- Students are to use the addresses assigned to them when acting as the customer.
- Each student will have the chance to roleplay as a customer and as a specialist (Example: During Roleplay A the student will act as a customer and during Roleplay B the same student will act as the specialist).
- Students may use any training aids throughout the roleplays.
- Both students should stay in their role as much as possible.
- If the specialist needs to check on information, they should place the customer on hold to break the roleplay.
- The student acting as the customer should start the roleplay with a call into the Business Office.
- The student acting as the specialist will practice their negotiation skills as well as any necessary system input.
- Advise the students to inform you when they have completed Roleplay A.
- Once everyone has completed Roleplay A, you should debrief the exercise, verify system input, and answer any questions.
- Explain that the students should now switch roles and continue with Roleplay B.
- Once Roleplay B is complete, you should again debrief the exercise, verify system input, and answer any questions.

Student Role Play Scripts A and B (Refer to Handout)

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CALL RESTRICTIONS

Learning Advisor Guide
SB305C - Lesson 11

July, 1994

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Call Restrictions

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Introduction 2

Handout 2

Learning Activity 2

Conclusion 2

Estimated Time: 1.5 Hours

Outcomes

- understand and be able to explain the various methods of restricting calls
- be able to access in the handbook the codes associated with Toll Billing Exception and Customized Code Restriction
- recognize when it is appropriate and know how to send the mechanized TBE Confirmation letter
- know how to format TBE and CREX entries on an N order

Advance Preparation

Prior to presenting this lesson, find out if there are any state-specific requirements regarding the offering of CREX (particularly CREX4) and what local practices are required for an order containing calling restrictions in your state (e.g., retained remarks entries, name/date of person requesting, is this a required offering in your state?, etc.).

This lesson is completely self-paced and the handout is all inclusive. The learning activity at the end of the lesson (if you elect to use it as a review) will require the following:

- small slips of paper (folded) labeled with each TBE FID
- a container for the slips of paper
- small slips of paper (folded) labeled with each CREX USOC
- easel paper and colored markers

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Introduction

In this lesson you are going to learn about several ways to block toll usage which a customer is asking us to restrict. Sometimes customers want to block only collect calls to their business. Other customers may only want to block third number billing of calls. Still others may want to restrict certain dialing capabilities from within the business. We have available several types of calling restrictions which will provide customers with options on how this may best be accomplished; you are going to learn something about each type in this lesson.

As you read the handout, pay particular attention to the handbook/OLD references. These will be your "prompts" for explaining and helping customers establish these restrictions once you are on-job.

Handout

Distribute the handout and instruct students to read it in its entirety. Once everyone has finished, you may prefer to review the class by revisiting the "outcomes" or you may conclude with the learning activity below.

Learning Activity

For this exercise, you will be using the slips of paper and container from your Advance Preparation. Have each student (in turn) draw a slip of paper from the container. Student should read the FID or USOC on his/her slip of paper to the class (or you may have them board the FID/USOC). Student should then identify which type of restriction this is, briefly explain how it works (as if explaining it to a customer), briefly discuss any negatives of having this block, and demonstrate to classmates how to format it on the service order. Continue this in turn until all TBE and CREX options have been covered.

Summary

As a wrap-up, read the Outcomes from this lesson and make sure that all students are comfortable with the concepts taught in this lesson. Then solicit and answer any remaining questions the class may have.

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THE NEW CONNECT
SB305C - BAS

470.0600

November 1995

ATTACHED: Course SB305C - BAS - Lesson 12, Completing the Order - Remarks Screen
LAG - In its entirety (dated 11/95)
Handout - In its entirety (dated 11/95)

CANCELS: Course SB305C - Lesson 12, Completing the Order - Remarks Screen
LAG - In its entirety (dated 5/94)
Handout - in its entirety (dated 5/94)

INCLUDES: Revisions include:

- Removal of SNAC and ATLAS
- Removal of Handbook references
- Addition of Order Transmital
- Addition of Student Role Play script

This lesson incorporates all methods and procedures available through November 1995. Any changes occurring after that time will be added to future revisions.

EFFECTIVE DATE: Upon receipt

RESPONDENT: Elaine B. Ware, 404 321-8564

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COMPLETING THE ORDER-REMARKS SCREEN

Learning Advisor Guide
SB305C - BAS - Lesson 12

November 1995

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Call Restrictions

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Handout	2
Explain and Demonstrate	2
Semi-Grand Finale	3
Learning Advisor Role Play	3, 5
Student Role Play	4

Outcomes:

After the class has completed this lesson, students will be able to:

- Negotiate a correct and complete DDA and DEL.
- Negotiate appropriate due dates for addressed and non-addressed locations.
- Negotiate appropriate due dates for restricted areas and re-numbered addresses.
- Make access arrangements (i.a.).
- Input appropriate billing FIDs and associated data (IIB and IBI).
- Recap an order.
- Make changes to an order before transmitting.
- Transmit an order.

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Materials/Supplies:

SONGS User GuideOLD

Handout

Terminals

Markers

Due Date Appointment Plan Operating Standard

Introduction:

You have arrived at the last screen of the N order sequence - the Remarks screen. You are ready to complete order negotiation and you will be using the Remarks screen to accomplish this.

You will learn about how directories are ordered for customers and how the information you put on the order affects delivery. Every year BellSouth loses hundreds of thousands of dollars due to directory delivery errors, many of which were avoidable. You can help reduce this loss by making every effort to insure that the information you negotiate for directory delivery is correct and complete.

This lesson is going to teach you how to establish installment billing of non-recurring charges on an N order. You will also find out more about due dates than you ever thought possible.

Handout:

Distribute the handout, calling students' attention to the copy of a Remarks screen on the last page. Have students read pages 1-16. Prompt them to locate as much of the reference information as possible in OLD.

Explain and Demonstrate:

Ask students to gather around one BOCRIS terminal as you build an order to the end of the Remarks screen. Input complete and correct information so that proper terminal responses will be obtained. **Be sure to place special emphasis on the following**:

- Directory Delivery codes OT and OA.
- Installment Billing (IIB) - provide information on the number of months allowed in your area and whether this may be offered or if the customer must request it.

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- **Move (MV=) and Delete (.DEL) commands** - mentioned but not taught in the handout
- Restricted Due Dates
- *Appointment Codes*
- System Request Codes
- RMK and RMKR - **Advise students of local procedures.** **STRESS:** The use of a virgule in the RMKS section will cause an error.
- HN Status - **Advise students on local procedures governing orders held in the HN status.** This is not taught in the handout, but a simple explanation of when to use in your state should be sufficient.

Semi-Grand Finale:

Once everyone has completed the reading, it might be wise to do a little recapping of your own here. The handout has encouraged students to ask questions - this lesson has covered ***a lot*** of information. Any local practices regarding further disclosure statements of any kind should be stressed here as well.

When you feel confident that everybody's on board, instruct students to read tremaining pages 17-20 of the handout and to use their assigned addresses for the Learning Advisor and Student Role Plays.

Learning Advisor Role Play:

Purpose: To allow students practice in system input and negotiation skills.

Instructions:

- Explain to students the purpose of the role play.
- Act as the customer. Ask for a volunteer or choose one participant to act as the specialist.
- Explain that the specialist is to stay in the role as much as possible. If the student needs to verify information, the student should ask to place the customer on hold to break the role play.
- Begin the roleplay with a simulated call into the Business Office. The student should proceed with the order as if a real customer is calling.
- All other students are to practice system input only.
- Once the role play is completed, debrief and answer questions.

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Student Role Play:

Purpose: To allow students practice in system input and negotiation skills.

Instructions:

- Explain to students the purpose of the role play.
- Break the class into groups of two.
- Each student will role play as a customer and as a specialist. For example, in role play A, one student will act as the customer; in role play B the same student will act as the specialist. Customer role play information is located in the Handout.
- When acting as the customer, advise students to use the address assigned to them.
- Students may use any training aids available throughout the role play.
- Students are to stay in their role as much as possible. If a student needs to verify information, the student should ask to place the customer on hold to break the role play.
- Begin each role play with a simulated call into the Business Office. Students should proceed with the order as if a real customer is calling.
- Advise students to inform you when they have completed role play A.
- Debrief the role play by verifying system input and answer any questions.
- Begin role play B. Debrief when completed.

IMPORTANT: Remind students to cancel all orders begun during this lesson.

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LEARNING ADVISOR ROLE PLAY

Customer Profile:

Customer Name:	Abigail Andrews Abby's Arbor Inn
Customer Address:	Use an address provided in Introduction to the Curriculum course.
Listing Instructions:	Listed as Abby's Arbor Inn with an additional listing in Abigail's name. Yellow Page listing is **Inns.**
Billing Address:	Use listed address
Social Security Number:	_____
Credit Information:	Abigail is the sole owner. She has no other business service at this time. Three years ago she closed a similar business. Her residence number is 555-1827.
Services:	Abigail would like an easy number but will only pay for one search. She also needs flat rate service, TouchTone, Three-Way Calling, and one Calling Card. She will accept the Service Plan. She wants AT&T as the carrier. There are no jacks or wiring in place.
Directory:	1 WP and 2 YP
Due Date:	Abigail accepts the offered date
CBR:	555-1827

NOTE: As the student is recapping the order, Abigail decides to change her billing address to her residence: 489 Apple Grove Lane.

Be sure the student verifies the following order entries:

Listed Name (LN)	Number of Directories (DEL)
Listed Address (LA)	Billing Name and Address (BN, BA, PO)
Additional Listing(s) (AL)	Installment Billing (IB)
Service Address (SA)	Service and features in the S&E
YPH and SIC codes (YPH and SIC)	Monthly rate and non-recurring charges
Directory Delivery Address (DDA)	

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THE NEW CONNECT
SB305C - BAS

470.0600

November 1995

ATTACHED:	Course SB305C - BAS - Lesson 13, Putting It All Together LAG - In its entirety (dated 11/95) Handout - In its entirety (dated 11/95)
CANCELS:	Course SB305C - Lesson 13, Putting It All Together LAG - In its entirety (dated 6/94) This lesson had no handouts
INCLUDES:	Revisions include: — Updated Student Role Plays as Service Representatives. Students will practice negotiating and inputting N orders. — Addition of Student Role Play Debrief Points This lesson incorporates all methods and procedures available through November 1995. Any changes occurring after that time will be added to future revisions.
EFFECTIVE DATE:	Upon receipt
RESPONDENT:	Elaine Ware, 404 321-8564

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PUTTING IT ALL TOGETHER

Learning Advisor Guide
SB305C - BAS - Lesson 13

November 1995

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Putting It All Together

Table of Contents

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Introduction 2

Student Role Plays 2

Student Role Play Debrief 2

Outcome:

When students have completed this lesson they will be able to:

- Negotiate an N order to completion
- Perform all terminal interactions associated with issuing an N order appropriately
- Incorporate sales-related and bridging skills taught in SB728 and SB042

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Introduction:

During this lesson you will "put together" all the pieces you've learned from the previous lessons in the New Connect course.

Feel free to use this time to get answers to all questions you may still have and to clear up any misunderstandings. This set of exercises is intended to give you a chance to practice everything you've learned and to become comfortable with the flow of an entire N order.

Student Role Play:

Purpose: To allow students practice in system input and negotiation skills.

Instructions:

- Explain to students the purpose of the role play.
- Break the class into groups of two.
- Each student will role play as a customer and as a specialist. For example, in role play A, one student will act as the customer; in role play B the same student will act as the specialist. Customer role play information is located in the Handout.
- When acting as the customer, advise students to use the address assigned to them.
- Students may use any training aids available throughout the role play.
- Students are to stay in their role as much as possible. If a student needs to verify information, the student should ask to place the customer on hold to break the role play.
- Begin each role play with a simulated call into the Business Office. Students should proceed with the order as if a real customer is calling.
- Advise students to inform you when they have completed role play A.
- Debrief the role play by verifying system input and answer any questions.
- Begin role play B - H. Debrief when completed.

IMPORTANT: Remind students to cancel all orders begun during this lesson.

Student Role Play Debrief:

Debrief the student role plays by doing the following:

- Ask the students how they felt about the contact. Discuss what they felt went well and what could have gone better.

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- Ask the "Specialist":
  - Were there any particular instances where you were unsure of what to do?
  - Did you feel comfortable with the way the information flowed between you and your customer?
  - What would you do differently next time?
- Solicit feedback from the other students.

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BELLSOUTH®

Basic Classes Of Service

SB305C/Lesson 7-Tennessee

Participant Handout
Issue 1 - June 1996

Performance Improvement Department

BASIC CLASSES OF SERVICE

Tennessee
Handout
SB305C - Lesson 7

June 1996

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Basic Classes Of Service (BCS) - Tennessee

Overview

You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

Please read the entire handout and perform the terminal practice in the lesson just as you are instructed. When you have completed the handout, we will discuss some other things you will need to have heard about in conjunction with classes of service.

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Basic Classes Of Service (BCS) - Tennessee (continued)

BCS Types

Business telephone customers in Louisiana have a choice of different types or classes of service. The most commonly offered of these are:

- Basic Local Exchange
- RegionServ, and
- Morristown Area Calling Plan

Basic Local Exchange Service (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

RegionServ Service offers customers:

- low monthly access rates
- more control over their telephone bills
- price caps on local charges
- extended seven-digit local calling to some areas that are otherwise long distance

Morristown Area Calling Plan offers **Morristown** customers:

- a wider local (seven-digit dialing) calling area
- more control over their telephone bills
- low monthly access rates

Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.

Continued on next page

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Basic Classes Of Service (BCS) - Tennessee (continued)

BCS Types

These classes of service (unlike Flat Rate service) allow customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call

and

- the time of day or night the call is placed.

These variables apply only to outgoing calls.

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Basic Classes Of Service (BCS) - Tennessee (continued)

RegionServ Service

RegionServ is an optional usage-based pricing offering that provides seven-digit dialing of calls from the subscriber's home wire center to all wire centers within a 40-mile radius based on airline mileage, in addition to the existing local calling area.

RegionServ consists of an access line with associated monthly rate plus usage for all local calls. Subscribers may choose the 20% discount option. The discount option charge is in addition to the access line rate and is applicable per line.

Service Connection Charges

A service connection charge does not apply to initial changes or to subsequent changes on RegionServ that are made within 180 days of the initial change, if no more than one change is made during the billing month.

Access RegionServ in OLD now and review the Local Usage Charges section.

Discount Usage Option

Subscribers may choose to pay $1 per month additional recurring charge and receive a 20% discount on all usage.

Time Of Pay Discount

50% off usage rates during off-peak period -- weekends and holidays, after 8:00 p.m. but before 8:00 a.m., Monday-Friday.

Access OLD now and read about RegionServ Benefits and Restrictions.

NOTE: Maryville customers (615-970 and 615-985) may not subscribe to RegionServ.

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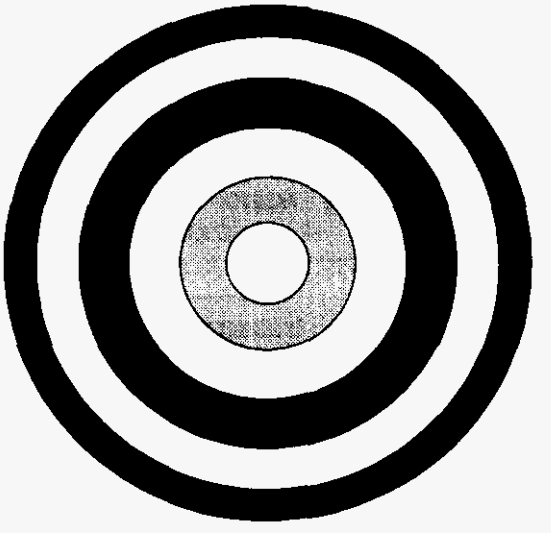
Basic Classes Of Service (BCS) - Tennessee (continued)

RegionServ/ Morristown Area Calling Plan Options

RegionServ Service and Morristown Area Calling Plans - *Economy* and Standard are the options for customers who need an economical way to pay for telephone service. Both of these plans help make telephone service affordable for any type of business. With expanded local calling area, customers may call nearby numbers that were previously long distance (and still are for Flat Rate customers) for a local charge that is less than the long distance rate. AND...calls are made by dialing the seven-digit telephone number (instead of 1+ as with any local call).

We said earlier that customers have flexibility because of the options within the service. In just a moment we will take a closer look at these options, but first we will look at a term you are about to see used with both options. That term is **BANDS**. Notice the "target" below.



The local (or seven-digit dialing) area is divided into bands. Think of banding as a target as you see above. Each circle radiating from the center is a "band." With RegionServ and the Morristown Area Calling Plans, the price of a call is determined, in part, by what band the call terminates in. The farther away from the center, the more the call will cost.

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Basic Classes Of Service (BCS) - Tennessee (continued)

RegionServ/ Morristown Area Calling Plan Options (continued)

When you are negotiating a class of service, the customer will sometimes want to know what exchanges fall into particular bands before making a decision about which plan will be most beneficial to his/her calling habits. BOCRIS gives you this information specific to every exchange in Tennessee where RegionServ and Morristown ACP are available. Let's learn how you'll access this information

- If you are not already logged on to BOCRIS, please do so. When you reach the BOCRIS Entry screen you will enter the NPA in the designated field.
- Enter **423** in the NPA field and depress the **HOME** key.
- On the message line, enter **BAMS423586** at the HOME position and depress **F7**. Does your screen look like the one below? Good! We will briefly "tour" these screens now..

```
423                  *INFO* BAMS 423586  MEASURED SERVICE DISTANCE       PAGE 1
  DEPRESS PF8 TO VIEW NEXT PAGE                                                NHVL
SEE OLD & TARIFF A3.10 FOR ACPXX BAND INFO;*REGIONSERVE NOT AVAILABLE***MO RATE
FOR ACPXX - 4.50 ECONOMY, 8.50 STANDARD***ACP RATES NOT SHOWN BELOW****
PLAN  BAND   1ST   ADDL LTI  C I T Y        N X X   O R   N P A - N X X
----- ----  ----  ---- ---  ----------  ---------------------------------------
REGSV   A   0.02  0.02  L  XXXXXXXXXX  203,204
                        L  MORRISTOWN  312,318,581,585,586,587
        B   0.05  0.05  L  BEAN STA     993
                        T  TATE SPG     767
                        T  WHITE PINE   674
        C   0.10  0.10  L  BULLS GAP    235
                        T  DANDRIDGE    397
                        T  JEFFERSNCY   471,475
                        T  RUTLEDGE     828
        D   X.XX  X.XX  T  CHESTNUTHL   509
                        T  NEWPORT      608,613,623,625
                        T  ROGERSVL     272,921
                        T  SNEEDVILLE   733
                        T  WASHBURN     497
        E   X.XX  X.XX  T  BENT CREEK   217
                        T  MASCOT       932,933
                        T  MAYNARDVL    992
                        T  NEWPORT      487
```

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Basic Classes Of Service (BCS) - Tennessee (continued)

RegionServ/ Morristown Area Calling Plan Options (continued)

- At the top, the screen is identified for you - **BAMS423586.** This lets you know the exchange the information is for. This is important since the banding is a little different for each wire center. Notice the message line prompt telling you to depress F8 to view subsequent pages.

- Let's look at each column of the next line individually:

- **PLAN** *column tells you that this information is for* **REGSV**.

- **BAND** column shows you which band the information is for.

- **1ST** and **ADDL** columns display the rates for first and additional minutes.

- **LTI** (for Local Toll Indicator) column displays "L" for local, "T" for toll, "X" or "0" for does not apply or is not available.

- **CITY** column shows the community name for the exchanges.

- **NXX or NPA - NXX** column displays the NXXs included in each band.

- Scroll through the screens now by depressing F8. Notice that RegSv banding information begins directly after RegSv information. This an important point. Make sure you are viewing the banding information for the correct plan because there are some differences.

Now that you have seen how the banding structure operates and you know how to access specific banding information for a particular NXX, let's look at each class of service option in greater detail.

Continued on next page

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Basic Classes Of Service (BCS) - Tennessee (continued)

RegionServ/ Morristown Area Calling Plan (continued)

Basic Local Exchange Service (also known as Flat Rate Service)

When a customer wants unlimited use of the local network, he/she is conditioned to think "Flat Rate." Customers who subscribe to Flat Rate (1FB) service know exactly what their charge for local calling will be each month because it does not fluctuate with usage. However, unlike RegionServ and Morristown ACP, ***Flat Rate customers do not enjoy the benefits of a wider 7-digit local calling area.***

RegionServ/Morristown Area Calling Plan

These plans are by far the most flexible calling plans available to **(ACP-Morristown Only and RegionServ for other Tennessee customers)** Tennessee customers and ones for which you will find many applications. Within Morristown ACP there are two options:

- **Economy Business**

- **Standard Business**

Let's look at both options now.

Economy Business offers customers a reduced rate with somewhat limited calling. Customers pay a line charge plus usage charges. The usage charges are capped at $25.00 for Bands A through D.

In OLD, locate the charts outlining discount periods for Economy Business and Standard Business.

Continued on next page

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Basic Classes Of Service (BCS) - Tennessee (continued)

RegionServ/ Morristown Area Calling Plan (continued)

As you can see from these discount period charts, customers who make most (or many) of their calls during times other than "peak" periods receive a substantial discount toward their usage charges. This can be a real selling point for customers who are at work all day and are only home after 8:00 p.m. and on weekends and holidays when usage rates are discounted *by half.*

Standard Business offers customers a reduced rate with a built-in usage allowance. Customers who select Standard Business also pay a line charge plus they pre-pay for a usage allowance that is applied toward any calls made to Bands A through D. Usage charges are capped at $21.00 (because the customer has pre-paid a $4.00 usage fee). These customers receive an *additional* 20% discount on the total usage charges, even after the 50% discount is applied (the 20% is applied before the cap). Where else can you find *anything* discounted by as much as 70%?! There is additional information regarding this subject in OLD. Find this information and read it now.

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Basic Classes Of Service (BCS) - Tennessee (continued)

Usage Rates (continued)

Usage Rates

Usage rates apply for all outgoing calls, *except* calls to:

- busy numbers
- an operator
- SCB Repair Service
- SCB Business Office
- 911 Emergency Service
- numbers which do not answer

If you know the band to which a call is made, the length of the call and the time of day the call was placed you may use this information to determine the exact cost of a call.

- Access the subject **Area Calling Plan** in OLD and read about Morristown ACP.
- Find the section that gives you Band Rates. The information you are accessing will assist you in calculating cost-per-minute of calls to every band. This is not something you will be asked to do with any regularity, but just to get a feel for what we are working with here, let's do a couple of examples.

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Service Order Negotiation

Exercise

A combination of RegionServ or Morristown ACP and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.

Let's take a look at how Flat Rate service and ACP look in COFFI. Please go to the BOCRIS entry screen and perform the following steps exactly as you are instructed:

- Enter SO,NB on the message line and depress F12 or ENTER
- Enter your name in the CN field and depress the tab key
- Enter the address **1088 SAWYERS RD** in the ADDR field
- Enter **MORRISTOWN** in the COM field *or* **37813** in the ZIP field
- Depress F8
- Correctly format your name in the ILN field
- In the IYPH field, enter NONE; in the ISIC field, enter 0000
- Enter any information you desire in the IBN1, IBA2 and IPO fields
- Depress F8 - notice the terminal response: **PREM MATCH**
- Enter any data you choose appropriately formatted in the ISS, ICI and ICC fields

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Service Order Negotiation (continued)

Exercise (continued)

- At the HOME position, enter =PREM and depress Enter
- Accept the address by typing aa in the home position and depress Enter. When you have received the terminal response of the SO,N CR screen, depress F8. You are now on the Basic Services screen of COFFI.
- Beside CLASS OF SVC/TOUCHTONE enter an "X" and depress Enter. The screen you are now viewing is the CLASS OF SVC/TOUCHTONE screen that looks very similar to the one below.

```
423 587      171            CLASS OF SVC/TOUCHTONE      PKNKMGX   SHAK NN9106
  ENTER VALID ACTION CODE/QUANTITY IN OPTION FIELD(S) AND DEPRESS S/R
 CN S JUDY                      SW TYP  5E   GEN 5E9.1        LNA# 615 214 7609
 DTF Y        TTP N  EXCH MRTN LATA KNVL

OPT    FEATURE/PACKAGE          EXTENDED NAME          A/R  USOC/DATE  RATE
    INDIVIDUAL LINE           FLAT RATE-TWO WAY         A    1FB       30.80
    INDIVIDUAL LINE           FLAT RT-2 WAY W/CLR ID IA A    1FBCL     30.80
    MEMORYCALL ENHANCED             NO VALID USOC       A               ????
    AREA CLG PLAN-TN          ECONOMY BUS               A    TACC1     24.50
    AREA CLG PLAN-TN          STANDARD BUS              A    TACC2     24.50
    AREA CLG PLAN-TN          INWARD-ECONOMY            A    TAC1B     24.50
    AREA CLG PLAN-TN          INWARD-STANDARD           A    TAC2B     24.50
    AREA CLG PLAN-TN          ECONOMY BUS               A    TACC1     24.50
    AREA CLG PLAN-TN          STANDARD BUS              A    TACC2     24.50
    AREA CLG PLAN-TN          INWARD-ECONOMY            A    TAC1B     24.50
    AREA CLG PLAN-TN          INWARD-STANDARD           A    TAC2B     24.50
    TOUCHTONE                 BUSINESS/PUBLIC           A    TTB        3.00
    NO MAINTENANCE CONTRACT   (NMC)                     A
    NON BASIC CUSTOMER        (ZNB)                     A
    OPTNL BASIC WIRING MTNC   PER LINE/PER PREMISE      A    SEQ1X      1.25
    CALLING CARD              UNRESTRICTED PIN          A    BSXUP      0.00
    END USER COMMON LINE      INTERST-RES/SINGL LN BUS  A    9LM        3.50
MORE...   PF5=REV PF7=MENU PF8=RETURN PF10=FWD PF11=BCK PF12=BOCRIS   01 OF 03
```

Notice the choices in classes of service. Notice that Flat Rate service is given an "Individual Line" designation in COFFI *(do not let this confuse you; this is not an important issue, it's just different from how you have seen it referred to before).* Once you help the customer determine which class of service best suits the needs of the customer you will make your selection.

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Service Order Negotiation (continued)

Exercise (continued)

Do this now by placing an "I" beside **AREA CLG PLAN-TN STANDARD BUSINESS (TACC2).** Depress the cursor tab or ENTER to move among your options and select one each of the following:

- TOUCHTONE
- OPTNL BASIC WIRING MTNC
- END USER COMMON LINE-Interst-RES/SINGL LN BUS

You will learn a little later about continuing order negotiation to completion, but for now, depress F8. If your order (after depressing F10 to scroll forward) looks like this, you are definitely on the right track.

```
SO,N S&E ID 99999                          PKNKMGX  RSAG NN9106
 SOE30A UPDATE ACCEPTED
 CN  S JUDY                                C           NR              R
 SR  AO  VN 000 SI         RC BM  PD   -  -   AC Y TI                SOI   BF
RG
 TN ??? ???-???? SA   CC 171 CD   -  -   EX MRTN AD 06-19-96 HU 0702 ID 06-19
 ORD N9N91065      CS TACC2 SLS ABCDEFF DD ? -  -   AC   AP W MA          (
)
                                           ZRTI N,R,205 5570000,ABC,205557
                                           ---LIST
                                           ILN  S JUDY
                                           ILA  1088 SAWYERS RD
                                           ISA  1088 SAWYERS RD
                                                , MORRISTOWN
                                           IDZIP37813
                                           IYPH NONE
                                           ISIC 0000
                                           IFCTN423 587-6362;OS
                                           ---BILL
                                           IPO  MORRISTOWN TN 37813
                                           ITAR 000,727
                                           ISS  000-00-0000;N
 #FLAG BDN;0L=02WD;WG=BHB                  ---S&E
                                         A I1   TACC2
                                         B I1   UPPT2
```

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Service Order Negotiation (continued)

Exercise (continued)

Look at the S&E section of your order (if you must scroll forward to do this, depress F10). Notice that the calls of service USOC TACC2 has been formatted for you along with the correct usage package USOC, UPPT2. Notice that your selected class of service has also been formatted at the top of your order. Look at the way your other selections have been formatted too.

Place your cursor at the HOME position on the message line and enter the "CAN" command. Depress Enter. The terminal response is NEGOTIATION CANCELED.

You have just selected a class of service and COFFI has formatted it appropriately in the S&E section of your order. That's about all there is to negotiating a class of service on a N order - *congratulations*!

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Billing For Local Service

Billing

Regardless of which class of service a customer chooses, **LOCAL SERVICE IS ALWAYS BILLED ONE MONTH IN ADVANCE.**

For a customer with Flat Rate service, this is no big deal, right? Their local service charges are the same from month to month, year to year, as long as they have Flat Rate Service. But, *what about customers who choose RegionServ, Economy ACP or Standard ACP?*

As you have probably guessed, the folks who prepare the bills are good, but they are not mind readers. For this reason, billing may sound a little complicated at first, but it will not be a mystery to you in a minute!

RegionServ, Economy ACP and Standard ACP customers will have usage charges in addition to the monthly charge for the type of local service they have selected. ***And,*** because we cannot anticipate what that usage will be "before the fact," local usage charges are billed one month in arrears (on the next bill). Simple of course, but a point you will want to make to your customers.

Also, when the customer receives the very first bill after service connection, local service will be billed from the date of service connection to the close of billing - to "catch up" **and** then from the date of the bill through the close of the next billing cycle. This could conceivably result in a two-month bill, something you will need to prepare your customer for.

Let's look at what the bill for **STANDARD ACP** customer looks like. This page of the bill will be accessed by depressing F2 (then F8) from the BOCRIS Entry screen after entering the telephone number provided to you by your Learning Advisor.

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Billing For Local Service

Billing (continued)

This information includes the Band(s) to which calls are made, number of calls and total number of minutes during both the peak and discount periods. This information will be tabulated for all bands included in the "capped" area. Calls to numbers outside the capped area will be grouped separately.

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Conclusion

A Few Things to Keep in Mind

- If a customer chooses RegionServ, Economy ACP or Standard ACP and elects to change to Flat Rate service, he/she may do so at no charge.
- A combination of classes of service is not allowed on the same account. (You will sometimes establish two lines on the same N order.)
- A combination of RegionServ, Economy ACP, Standard ACP and Flat Rate service is not allowed on the same premises for the same customer. In other words, if I have a main line and an additional line, both billed in my name at the same location, both accounts must be the same class of service - either RegionServ, Economy ACP or Standard ACP (either option) or Flat Rate service.

Sales Application

The target market for RegionServ/Morristown ACP includes:

- businesses who call long-distance to areas included within the expanded local calling area
- businesses who mostly receive incoming calls and want a low-cost local calling option
- employers who need to monitor employees' (and sometimes customers') use of the telephone.
- businesses who want more control over the cost of their monthly telephone bills
- businesses who want to reduce their intraLATA long-distance charges.
- any customer whose market area includes a nearby community that is located in the expanded local calling area.

Even if customers are frequent callers, they may still enjoy the convenience and flexibility of RegionServ and/or Morristown ACP because of discount periods (8:00 p.m. to 8:00 a.m., Monday through Friday, excluding holidays, and weekends).

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Conclusion (continued)

Summary

In this lesson you have learned:

- what classes of service are available to small business customers in Tennessee on a New Connect order. (There are others your Learning Advisor will tell you about when you have completed this handout, but you know the important stuff already!)
- how to determine which class of service is best for your customer
- how to make your selection in COFFI
- how the class of service you choose will look on the service order when COFFI "sends" it to SONGS
- what local usage charges for RegionServ, Economy ACP and Standard ACP actually look like on a customer's bill.

You have learned a lot!

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Checks For Understanding

Purpose

To measure participant comprehension at specific intervals.

Directions

You are allowed to use your OLD/Training Materials.

Your Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected.

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Participant Role-Plays

Purpose

Allow participants to practice system input and negotiation skills.

Directions

This next section is an activity that will allow you to practice system input and negotiation skills. This will consist of a role-play where the class will break into pairs. You should use the addresses assigned to you when acting as the customer. Each participant will have the opportunity to change to role-play as a customer and as a specialist.

Example:

Role-play A, the participant will act as a customer, Role-play B the same participant will act as the specialist.

You may use any training/job aids throughout the role-play. When acting as the specialist you are to stay in your role as much as possible. If you need to check on information you should ask to place the customer on hold to break the role-play. The participant acting as the customer starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary.

Advise the Learning Advisor when you have completed Role-play A. Once the role-play is complete the Learning Advisor will debrief the system input and answer any questions. The participants should now switch role and continue with Role-play B. Once Role-play B is complete the Learning Advisor will debrief and answer any questions.

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Participant Role-Play

Business Applications Specialist	Role-play A
Customer Profile	Bob Sneed Answerite Radio
Listed Name	Answerite Radio
Listed Address	Use address provided
Listing Information	Main listing to be Answerite Radio II. Will take specialist recommendation on Yellow Pages heading.
Billing Address	Use address provided
Services	1 Flat Rate business line

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Participant Role-Play, continued

Business Applications Specialist	Role-play B
Customer Profile	Marvin Goldstein Goldstein, Yurfest & Burns
Listed Name	Goldstein, Yurfest & Burns
Listed Address	Use address provided
Listing Information	Main listing to be Goldstein, Yurfest & Burns. Will take specialist recommendation on Yellow Pages heading.
Services	Morristown Economy Business Area Calling Plan

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Basic Classes Of Service - Tennessee

Job Aid

Basic Local Exchange Service (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
RegionServ, Morristown ACP and Flat Rate Service	A combination of RegionServ/Morristown ACP and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
RegionServ	**Offers:** • low monthly access rates • price caps • more control over telephone bills • extended seven-digit local calling to some areas that are otherwise long distance **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply and are additional to the charges mentioned above.
Morristown Area Calling Plan (ACP)	**This plan is available only to Morristown customers. It allows customers to pay a low monthly access charge with additional usage charges based on:** • number of calls placed • distance a call travels • length of call • time of day/night call is placed • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS423 at the HOME position and depress F7

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USOC JOB AID

TYPE OF SERVICE	USOC	CAP BANDS A-D
Basic Local Exchange Service	1FB	
RegionServ Service With Discount	TAKC1	
RegionServ Service Without Discount	113	
Morristown Area Calling Plan Economy Business	TACC1 + Usage Option Package UPPT1	$25.00
Morristown Area Calling Plan Standard Business	TACC2 + Usage Option Package UPPT2	$21.00

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LAG.

Tenn.

470.0600

June 20, 1996

Attached Course SB305C/Lesson 7 - Basic Classes Of Service-Tennessee
Learning Advisor Guide (Dated 06/96)
Participant Handouts (Dated 06/96)

Cancels Course SB305C/Lesson 7 - Basic Classes Of Service-Tennessee (Dated 11/94)

Changes SB305C/Lesson 7 has been revised to:

- reformat information contained within the course
- include General Information in the LA Guide which provides a description of the most commonly applied Basic Classes Of Service
- include Checks For Understanding
- include Role-play for Learning Advisor
- include Participant Role-plays
- include Job Aid

Effective Date Upon receipt

Respondent Sharon Judy, 404-321-8275

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BELLSOUTH®

Basic Classes Of Service

SB305C/Lesson 7-Tennessee

Learning Advisor Guide
Issue 1 - June 1996

Performance Improvement Department

Introduction

Objectives

At the conclusion of this lesson, participants will:

- understand the differences between the most commonly negotiated classes of service available to customers on a New Connect order
- have a basic understanding of how each class of service appears on a customer's bill
- be able to access the BAMS screen by NXX and give basic information regarding banding
- be able to negotiate Morristown ACP service
- be able to select a class of service in COFFI and map it to an order
- have a working knowledge of other classes of service they may see later (CRIM, LMR, B1M, and other state-specific grandfathered services)

Materials/ Supplies

- Handout
- Local Directory (1 per position)
- OLD

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Introduction, continued

Advance Preparation

- Locate and review the Learning Advisor Guide for your state
- Familiarize yourself with the information provided for the various Basic Classes Of Service
- Review Participant Handout
- Secure any locally-provided brochures on RegionServ and Morristown Area Calling Plan (1 per participant). This will give participants an opportunity to read the information on these classes of service from a customer's point of view and will also acquaint them with the brochure/handout as a potential sales tool.
- Obtain a copy of a bill for a customer who subscribes to Local Usage Detail (LUD) for use during your explanation of LUD. Participants are not taught about LUD or the BIR FID in the handout.

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Introduction, continued

Introduction

SAY: The purpose of this course is to educate you about the Basic Classes Of Service (BCS) that are available to our business customers.

Overview

STATE: You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

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Introduction, continued

BCS Description

BOARD and REVIEW:

"Basic Class Of Service" (BCS) is the term given to the type of service line the customer has for their local calling.

For Example:

A customer may request a Flat Rate Class Of Service (1FB). What this means is that the customer may make an unlimited number of outgoing local calls for one flat monthly rate.

As almost everything we offer our customers, Basic Class of Service must be tariffed before it can be provided to our customers.

Because each state is regulated by a different Public Service Commission (PCS) not every BCS exists in every state.

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Introduction, continued

Optional Calling Plans (OCPs)

OCPs are specifically designed toll plans that creatively meet our customers' communications needs through various toll service plans without sacrificing quality, reliability or convenience.

In some states OCPs may be designated as Basic Classes Of Service.

Flat Rate Service

Applicable in Alabama, Louisiana, Mississippi:

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Basic Local Exchange Service

DISCUSS with participants:

Applicable in Tennessee and Kentucky:

Basic Local Exchange Service (or 1FB) service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses his/her telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

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Introduction, continued

Area Calling Service (ACS)/Area Calling Plan (ACP)

Applicable in Alabama, Kentucky and Mississippi:

ACS/ACP allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call and,
- the time of day or night the call is placed

NOTE: ACP in Tennessee is available to Morristown customers only.

Local Optional Service

Applicable in Louisiana only:

Local Optional Service allows customers to pay a lower monthly access charge with additional usage charges based on:

- the number of calls
- the distance a call travels
- the length of a call and,
- the time of day or night a call is placed

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Introduction, continued

RegionServ

DISCUSS with participants:

Applicable in Tennessee only:

RegionServ is an optional usage-based local service plan. The basic features of the plan are:

- Low monthly access rates
- Control over bills because you pay for the local calls you make
- Price caps on local charges
- Extended seven-digit local calling to some areas that are otherwise long distance

Measured Rate Service

Applicable in Kentucky only:

Measured Rate Service is a usage sensitive local service that provides an option for a less costly service than the standard flat rate service.

Bands - not local calling area.

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Introduction, continued

Handout

Distribute the handout and allow participants about an hour to read through it. There is one terminal interaction for which participants have been given complete instructions including address. This practice takes participants through all the terminal commands from the beginning of a N order up through selecting a class of service in COFFI and "mapping" it to SONGS.

Please remind participants to cancel this practice order when the lesson is completed.

Summary

- Have participants return to a COFFI screen (any one in your NPA will do).
- Explain what "grandfathered" means and give examples of classes of service which have been "grandfathered."
- Point out the other classes of service which have not been taught in this lesson (e.g. B1M). Point out the different USOCs for the classes of service which have been taught in the handout.
- Explain party line service; point out USOC examples.

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Introduction, continued

Summary (continued)

- Explain zone mileage *(as appropriate for your state)*. Point out examples of mileage in RSAG/ORION and locate OLD examples.
- Explain Local Usage Detail (LUD) and point out the BIR FID in OLD.
- Have participants read about RegionServ and Morristown ACP in the Call Guide pages of the local directory.
- Solicit questions, or if you prefer, have participants ask questions of each other and be available for "back-up."
- This would be a good time to mention that **local service is billed one month in advance.** Explain this in a manner similar to:

  "Local service is billed one month in advance. Customers will be billed from the date of the bill up to the close of that month's billing period, so, in effect, if a customer pays his/her bill on time, they are actually "paid ahead" by a few days on local service through the close of that month's billing cycle.

  "When a customer's service is worked, local service is owed from the date after service connection up to the close of the billing period ***in addition to the full month which is billed in advance.*** Sometimes when a customer receives the first bill, he could theoretically be billed for almost two months of local service."

- Distribute/administer Checks For Understanding

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Introduction, continued

Terminal Exercise

Have the participants do a terminal action using the BCS screen. Practice choosing the different classes of service offered in your area. Have the participants locate in the NR portion of the order, the pre-populated 9LM CALC charge.

Continue this procedure until you feel the participants have an understanding of the Basic Class of Service screen.

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Checks For Understanding (CFU)

Purpose

To measure participant comprehension at specific intervals.

Set Up

- Explain the purpose of the Checks For Understanding and how they will be set up
- Work individually
- Each CFU will have a specific time frame for completion by participant
- CFU given to entire group at one time
- Participants are allowed to use OLD/Training Materials
- Health breaks before CFU session begins

Administration

- Participants are allowed to use OLD/Training Materials
- Learning Advisor must be present during entire CFU session
- Post "DO NOT DISTURB-REVIEW IN PROGRESS" sign on the door
- Regional review-no local variations
- CFU's & CFU trend sheets will become a part of the participant's training records
- Learning Advisor collects all CFUs at the end of each lesson
- The Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected

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Checks For Understanding (CFU), Continued

Feedback

- Each individual CFU has answer sheet provided in the Learning Advisor's Guide
- CFU results should be provided to participant no later than the next class day following the CFU
- Individual participant CFU results should be entered on CFU trend sheet
- Copy of CFU trend sheet is forwarded to manager at end of class

Auditing

- Completed CFUs will be reviewed by Training Manager during observation sessions
- Audit will include verification that CFUs are kept secured at all times

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Checks For Understanding Questions

Participant Name:_____

1) List the most common Basic Classes Of Service offered to business customers in your state:

_____

_____

2) Describe Flat Rate Service:

_____

_____

3) Describe RegionServ Service:

_____

_____

4) What charges apply to RegionServ Service?

_____

_____

5) Describe the Morristown Area Calling Plan:

_____

_____

6) What three things does ACP offer Morristown customers?

_____

_____

_____

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Checks For Understanding Questions (continued)

Participant Name:_____

7) What charges apply to ACP?

_____

_____

_____

8) What line on the BOCRIS screen identifies the exchange being accessed?

_____

9) How do you identify the Local Toll Indicator?

_____

_____

10) Usage rate is not applied to what types of calls?

_____

_____

_____

_____

Continued on next page

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Checks For Understanding Questions (continued)

Participant Name:_____

11) How and where are local usage charges summarized?

_____

_____

12) What is the Basic Local Exchange (Flat Rate) USOC?

_____

13) List the USOC for ACP-Standard with Usage Option package and ACP-Discount with Usage Option Package:

_____

_____

14) List the USOC for RegionServ With Discount and RegionServ Without Discount:

_____

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Checks For Understanding Questions Answers

1) List the most common Basic Classes Of Service offered to business customers in your state:

Basic Local Exchange Service; RegionServ Service; Morristown Area Calling Plan

2) Describe Flat Rate Service:

Basic Local Exchange Service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area.

3) Describe RegionServ Service:

RegionServ is an optional usage-based pricing offering that provides seven-digit dialing of calls from the subscriber's home wire center to all wire centers within a 40-mile radius based on airline mileage, in addition to the existing local calling area.

4) What charges apply to RegionServ Service?

low monthly access charge and additional usage charges

5) Describe the Morristown Area Calling Plan:

It is a plan that allows Morristown customers to pay a low monthly access charge with additional usage charges based on the number of calls placed, the distance a call travels, the length of the call and the time of day or night the call is placed.

6) What three things does ACP offer Morristown customers?

a) **a wider local (seven-digit dialing) calling area**
b) **more control over their telephone bills**
c) **flexibility, because within ACP there are two choices: Economy Business and Standard Business**

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Checks For Understanding Answers (continued)

7) What charges apply to ACP?

low monthly access charge and additional usage charges

8) What line on the BOCRIS screen identifies the exchange being accessed?

Top Line

9) How do you identify the Local Toll Indicator?

Column 5 on the BAMS BOCRIS screen

10) Usage rate is not applied to what types of calls?

a) busy numbers
b) SCB Repair service
c) 911 Emergency service
d) Operator
e) SCB Business Office
f) numbers which do not answer

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Checks For Understanding Answers (continued)

11) How and where are local usage charges summarized?

a) by bands
b) local usage summary column on customer's bill

12) What is the Basic Local Exchange (Flat Rate) USOC?

1FB

13) List the USOC for ACP-Standard with Usage Option package and ACP-Discount with Usage Option Package:

a) ACP-Standard: TACC2 + UPPT2
b) ACP-Economy: TACC1 + UPPT1

14) List the USOC for RegionServ With Discount and RegionServ Without Discount:

a) With Discount: TAKC1
b) Without Discount: 113

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Learning Advisor Role-Play

Purpose

Allow participants to practice system input and negotiation skills.

Directions

- Explain to participants that this activity will allow all of them to practice system input.
- The Learning Advisor will acts as the customer and ask for volunteers or choose one participant to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information the specialist should ask to place their customer on hold to break the role-play.
- The Learning Advisor starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. All other participants will practice system input only.
- Once the role-play is complete the Learning Advisor will debrief and answer any questions.

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Learning Advisor Role-Play, Continued

Learning Advisor Role-Play	This role-play should be demonstrated for the entire class.
Customer Profile	Bill Lauver Justina Athletic Association
Listed Name	Justina Athletic Association
Listed Address	Use address provided
Listing Instructions	Main listing to be Justina Athletic Association. Will take specialist recommendation on Yellow Pages heading.
Billing Address	ATTN: Bill Lauver 1438 Bell Road Nashville, TN
Credit	Mr. Lauver has never had service before. Use 123456789 as social security number.
Services	Mr. Lauver wants 1 Flat Rate business line, TTB, Maintenance, Call Waiting, 2 Calling Cards, AT&T as Long distance carrier, RegionServ With Discount

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Participant Role-Plays

Purpose	Allow participants to practice system input and negotiation skills.
Directions	See Participant Handout for details..

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Basic Classes Of Service - Tennessee

Job Aid

Basic Local Exchange Service (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
RegionServ, Morristown ACP and Flat Rate Service	A combination of RegionServ/Morristown ACP and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
RegionServ	**Offers:** • low monthly access rates • price caps • more control over telephone bills • extended seven-digit local calling to some areas that are otherwise long distance **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply and are additional to the charges mentioned above.
Morristown Area Calling Plan (ACP)	**This plan is available only to Morristown customers. It allows customers to pay a low monthly access charge with additional usage charges based on:** • number of calls placed • distance a call travels • length of call • time of day/night call is placed • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS423 at the HOME position and depress F7

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USOC JOB AID

TYPE OF SERVICE	USOC	CAP BANDS A-D
Basic Local Exchange Service	1FB	
RegionServ Service With Discount	TAKC1	
RegionServ Service Without Discount	113	
Morristown Area Calling Plan Economy Business	TACC1 + Usage Option Package UPPT1	$25.00
Morristown Area Calling Plan Standard Business	TACC2 + Usage Option Package UPPT2	$21.00

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H/O

Mississippi

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The New Connect SB305C

Student Handout Mississippi
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Student Handout Mississippi

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Basic Classes Of Service (BCS) - Mississippi

Overview

You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

Please read the entire handout and perform the terminal practice in the lesson just as you are instructed. When you have completed the handout, we will discuss some other things you'll need to have heard about in conjunction with classes of service.

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Basic Classes Of Service (BCS) - Mississippi

BCS Types

Business telephone customers in Mississippi have a choice of different types or classes of service. The most commonly offered of these are:

- Flat Rate, and
- Area Calling Plan

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Area Calling Plan (ACP) offers customers:

- a wider local (seven-digit dialing) calling area
- more control over their telephone bills
- flexibility, because within ACP there are two choices - Economy Business and Standard

Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.

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Basic Classes Of Service (BCS) - Mississippi

BCS Types

These classes of service (unlike Flat Rate service) allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call

and

- the time of day or night the call is placed.

These variables apply only to outgoing calls.

Keep in mind, while interviewing and determining your customer's needs: The Mississippi Public Service Commission requires us to disclose Basic Service information to our telephone customers. Basic Service in Mississippi is the Area Calling Plan-Economy Business service.

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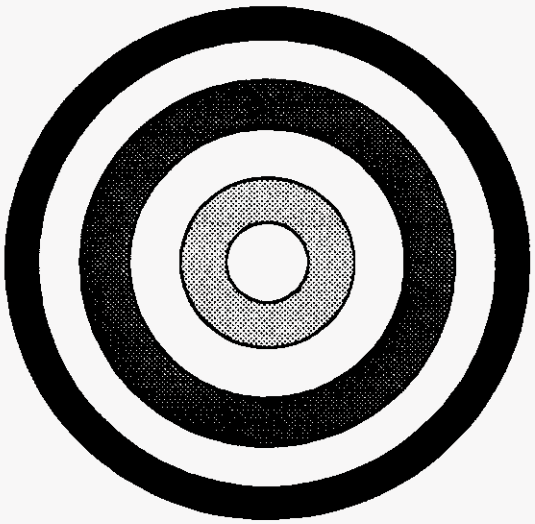
Area Calling Plan (ACP)

ACP Options

ACP is the option for customers who need an economical way to pay for telephone service. Both the Economy Business and Standard options of ACP help make telephone service affordable for any type of business. With ACP's expanded local calling area, customers may call nearby numbers that were previously long distance (and still are for Flat Rate customers) for a local charge that is less than the long distance rate. AND...calls are made by dialing the seven-digit telephone number (instead of 1+ as with any local call.)

We said earlier that ACP customers have flexibility because of the options within the service. In just a moment we'll take a closer look at these options, but first we'll look at a term you're about to see used with both options. That term is **BANDS**. Notice the "target" below.



The local (or seven-digit dialing) area is divided into bands. Think of banding as a target like you see above. Each circle radiating from the center is a "band." With ACP the price of a call is determined, in part, by what band the call terminates in. The farther away from the center, the more the call will cost.

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Area Calling Plan (ACP) (continued)

ACP Options (continued)

When you are negotiating a class of service, the customer will sometimes want to know what exchanges fall into particular bands before making a decision about which plan will be most beneficial to his/her calling habits. BOCRIS gives you this information specific to every exchange in Mississippi where ACP is available. Let's learn how you'll access this information

- If you are not already logged on to BOCRIS, please do so. When you reach the BOCRIS Entry screen you will enter the NPA in the designated field.
- Enter **601** in the NPA field and depress the **HOME** key.
- On the message line, enter **BAMS366** at the HOME position and depress **F7**. Does your screen look like the one below? Good! We'll briefly "tour" these screens now..

```
601                 *INFO* BAMS 601366  MEASURED SERVICE DISTANCE       PAGE 1
   DEPRESS PF8 TO VIEW NEXT PAGE                                            JKSN

JACKSON - MEADOWBROOK
PLAN  BAND   1ST   ADDL LTI  C I T Y        N X X   O R   N P A - N X X
----- ----  ----  ---- ---  ----------  ----------------------------------------
ACPXX   A   0.02  0.01  L   XXXXXXXXXX  203,204
                        L   JACKSON     362,364,366,368,929,930,981,982,984,985
                                        987,995
        B   0.04  0.02  L   XXXXXXXXXX  461,919
                        L   BILLINGNXX  404
                        L   BRANDON     829
                        L   BROADBAND   405
                        L   CLINTON     924,925
                        L   JACKSN      421
                        L   JACKSON     259,260,278,291,292,331,346,351,352,353
                                         354,355,359,360,370,371,372,373,376,471
                                        478,573,664,821,881,882,899,920,922,923
                                        926,927,932,933,936,937,939,940,941,942
                                        944,946,948,949,951,952,953,954,955,956
                                        957,960,961,965,966,968,969,973,974,977
                                        978,991,992
                        L   MADISON     853,856,898
        C   0.06  0.04  L   BOLTON      866
```

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Area Calling Plan (ACP) (continued)

ACP Options (continued)

- At the top, the screen is identified for you - **BAMS601366** This lets you know the exchange the information is for. This is important since the banding is a little different for each wire center. Notice the message line prompt telling you to depress F8 to view subsequent pages.

- Let's look at each column of the next line individually:

- **PLAN** column tells you that this information is for **ACP.**

- **BAND** column shows you which band the information is for.

- **1ST** and **ADDL** columns display the rates for first and additional minutes.

- **LTI** (for **L**ocal **T**oll **I**ndicator) column displays "L" for local, "T" for toll, "X" or "0" for does not apply or is not available.

- **CITY** column shows the community name for the exchanges.

- **NXX or NPA - NXX** column displays the NXXs included in each band.

- Scroll through the screens now by depressing F8. Notice that ACP banding information begins directly after ACP information. This an important point. Make sure you are viewing the banding information for the correct plan because there are some differences.

Now that you've seen how the banding structure operates and you know how to access specific banding information for a particular NXX, let's look at each class of service option in greater detail.

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Area Calling Plan (ACP) (continued)

ACP Options (continued)

With the **Economy** option, customers pay the basic line charge plus the usage for local calls they originate. Customers may make as many calls as they desire to Bands A, B and C and the monthly usage charges will not exceed a capped amount of $25.00. This simply means that even though a customer may make enough calls to Bands A-C to have incurred more than $25.00 in usage charges, he/she will be billed no more than $25.00 for these calls. Remember, this does not include calls to Bands D, E, F and G.

Customers who subscribe to the **Standard** option pay an additional $6.00 charge for a local calling package that gives them a 20% discount on all calls made to Bands A, B and C. No matter how many calls they make to Bands A, B and C the usage charges will not exceed the $25.00 capped amount each month. **There is no cap nor is the 20% discount applied to calls to Bands D, E, F and G.** (The 20% discount is subtracted before local usage charges are applied toward the $25.00 maximum.)

Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll charges, etc.) apply and are additional to the charges mentioned above for both options.

Flat Rate Service

When a customer wants unlimited use of the local network, he/she is conditioned to think "Flat Rate." Customers who subscribe to Flat Rate (1FB) service know exactly what their charge for local calling will be each month because it does not fluctuate with usage. However, unlike ACP, ***Flat Rate customers do not enjoy the benefits of a wider 7-digit local calling area.***

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Area Calling Plan (ACP) (continued)

ACP Options (continued)

Usage Rates

Usage rates apply for all outgoing calls, *except* calls to:

- busy numbers
- an operator
- SCB Repair Service
- SCB Business Office
- 911 Emergency Service
- numbers which do not answer

If you know the band to which a call is made, the length of the call and the time of day the call was placed you may use this information to determine the exact cost of a call.

- Access the subject **Area Calling Plan** in OLD and read about **ACP Economy Business** and **ACP Standard.**
- Find the section which gives you Band Rates. The information you are accessing will assist you in calculating cost-per-minute of calls to every band. This is not something you'll be asked to do with any regularity, but just to get a feel for what we're working with here, let's do a couple of examples.

To get a feel for what we're working with, let's do a couple of examples:

I made a 15-minute call around 9 a.m. from my tanning salon on Tuesday to my mom who lives in Band C. How much did this call cost?

_____

(Check with your Learning Advisor to ensure you have the correct answer.)

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Area Calling Plan (ACP) (continued)

***ACP Options* (continued)**

Now let's say I called mom on Saturday afternoon instead of Tuesday morning. How much did the same call cost during the off-peak period?

_____

(Check with your Learning Advisor to ensure you have the correct answer.)

As you can see from these discount period charts, customers who make most (or many) of their calls during times other than "peak" periods receive a substantial discount toward their usage charges. This can be a real selling point for customers whose business hours extend beyond 5 p.m. and during weekends and holidays when usage rates are discounted by half.

Remember these points about ACP:

- Usage to Bands A, B and C is capped in both Economy Business and Standard options.
- Standard provides an additional 20% discount on calls to Bands A, B and C.
- **There is no cap or 20% discount for calls to Bands D through G.** Each call to these bands is billed at a less expensive rate than a long distance call and the numbers in these bands may be reached without dialing 1+; however, caps and the 20% discount do not apply.
- All calls (with either option) do, however, receive discounts during off-peak periods.

Please read about these discount periods in OLD now.

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Area Calling Plan (ACP) (continued)

ACP Options (continued)

Local Usage Billing:

Local Usage charges are summarized by bands under the "Local Usage Summary" section of the customer's bill. Bands A, B and C are summarized individually and the charges are totaled. The usage allowance and the 20% discount (for Standard ACP) are applied to the total charges for Bands A, B and C. This information is available on the BOCRIS Item screen. you should still be signed on to BOCRIS --- take a moment now to look at that screen.

Bands D through G are summarized individually and totaled. Okay, now you've got a pretty good idea about ACP and how it is structured. You know what it looks like on a customer's bill. Next we'll look at the USOCs you'll use to populate ACP and Flat Rate service on an order.

- When a customer wants Flat Rate service the USOC you'll use is **1FB.**
- When a customer decides on ACP Economy Business, the USOC is **1S8** plus the Economy Usage option USOC **UPP01.**
- When a customer selects ACP Standard, the USOC is **1ZJ** plus the Standard Usage option USOC **UPP02.**

When you select a class of service during order negotiation, COFFI will automatically format the correct usage package for the ACP USOC you choose; you just need to familiarize yourself with what they look like so you'll recognize them when you see them on a CSR later.

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Service Order Negotiation

Exercise

A combination of ACP and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.

Let's take a look at how Flat Rate service and ACP look in COFFI. Please go to the BOCRIS entry'screen and perform the following steps exactly as you are instructed:

- Enter SO,NB on the message line and depress F12 or ENTER
- Enter your name in the CN field and depress the tab key
- Enter the address **443 E DOWNING ST** in the ADDR field
- Enter **JACKSON** in the COM field *or* **39216** in the ZIP field
- Depress F8
- Correctly format your name in the ILN field
- In the IYPH field, enter NONE; in the ISIC field, enter 0000
- Enter any information you desire in the IBN1, IBA2 and IPO fields
- Depress F8 - notice the terminal response: **PREM MATCH**
- Enter any data you choose appropriately formatted in the ISS *(don't forget the "Y," "N" or "X" designation),* ICI, IYPH, ISIC and ICC fields.

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Service Order Negotiation, continued

Exercise (continued)

- At the HOME position, enter =PREM and depress Enter
- Accept the address by typing aa in the home position and depress Enter. When you have received the terminal response of the SO,N CR screen, depress F8. You are now on the Basic Services screen of COFFI.
- Beside CLASS OF SVC/TOUCHTONE enter an "X" and depress Enter. The screen you are now viewing is the CLASS OF SVC/TOUCHTONE screen which looks similar to the one below.

```
601 985      163            CLASS OF SVC/TOUCHTONE       PKNKMGX   SHAK NVVD06
  ENTER VALID ACTION CODE/QUANTITY IN OPTION FIELD(S) AND DEPRESS S/R
 CN SHARON JUDY                SW TYP  1A   GEN 1AE12.05     LNA# 601 974 2392
 DTF Y        TTP N  EXCH JKSN LATA JCSN

OPT    FEATURE/PACKAGE          EXTENDED NAME           A/R  USOC/DATE  RATE
    INDIVIDUAL LINE           FLAT RATE-TWO WAY          A    1FB       48.65
    INDIVIDUAL LINE           FLAT RT-2 WAY W/CLR ID IA A    1FBCL     48.65
    MEMORYCALL ENHANCED             NO VALID USOC        A               ????
    AREA CLG PLAN-MS          ECONOMY BUSINESS           A    1S8       29.90
    AREA CLG PLAN-MS          ECON BUS W/CALLER ID I.A   A    1S8CL     29.90
    AREA CLG PLAN-MS          STANDARD BUSINESS          A    1ZJ       29.90
    AREA CLG PLAN-MS          STD BUS W/CALLER ID I.A.   A    1ZJCL     29.90
    TOUCHTONE                 BUSINESS/PUBLIC            A    TTB        2.10
    NO MAINTENANCE CONTRACT   (NMC)                      A
    NON BASIC CUSTOMER        (ZNB)                      A
    CENTRAL OFFICE LINE CHG   NEW (NLC Y1)              A
    CENTRAL OFFICE LINE CHG   REUSED (NLC N1)           A
    OPTNL BASIC WIRING MTNC   PER LINE/PER PREMISE      A    SEQ1X      2.00
    CALLING CARD              UNRESTRICTED PIN          A    BSXUP      0.00
    END USER COMMON LINE      INTERST-RES/SINGL LN BUS  A    9LM        3.50
    END USER COMMON LINE      INTERSTATE-BUSINESS       A    9ZR        6.00
    SUBSCRIBER LINE CHARGE    INTRAST-RES/SINGL LN BUS  A    9LP        0.80
 MORE...    PF5=REV PF7=MENU PF8=RETURN PF10=FWD PF11=BCK PF12=BOCRIS   01 OF 02
```

Notice the choices in classes of service. Notice that Flat Rate service is given an "Individual Line" designation in COFFI *(don't let this confuse you; this is not an important issue, it's just different from how you've seen it referred to before).* Once you help the customer determine which class of service best suits the needs of the customer you will make your selection.

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Service Order Negotiation, continued

Exercise (continued)

Do this now by placing an "I" beside **AREA CLG PLAN-MS STANDARD BUSINESS.** Depress the cursor tab or ENTER to move among your options and select one each of the following:

- TOUCHTONE
- CENTRAL OFFICE LINE CHG (NLCN1)
- OPTNL BASIC WIRING MTNC
- END USER COMMON LINE-Interst-RES/SINGL LN BUS
- SUBSCRIBER LINE CHG

You will learn a little later about continuing order negotiation to completion, but for now, depress F8. If your order (after depressing F10 to scroll forward) looks like this, you're definitely on the right track.

```
SO,N S&E ID 99999                          PKNKMGX  RSAG NGJ571
 SOE612 PREM MATCH
 CN  SHARON JUDY                           C           NR            R
 SR  AO  VN 000 SI         RC BM  PD   -  -   AC Y TI             SOI   BF   RG
 TN ??? ???-???? SA   CC 163 CD   -  -   EX JKSN AD 06-11-96 HU 1018 ID 06-11
 ORD N6GJ5717      CS 1ZJ   SLS D11D11D DD ? -  -   AC   AP W MA          (   )
                                         ZRTI N,$,B,404 321-8275,SJ,404321
                                         ---LIST
                                         ILN  SHARON JUDY
                                         IYPH NONE
                                         ISIC 0000
                                         ---BILL
                                         ISS  000-00-0000;N
                                         ---S&E
                                       A I1   1ZJ  /NLC Y1
                                       B I1   UPPO2
                                       C I1   TTB
                                       D I1   SEQ1X
                                       E I1   9LM
                                       F I1   9LP
 #FLAG BDN;0L=02WD;WG=CHD
```

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Service Order Negotiation, continued

Exercise (continued)

Look at the S&E section of your order (if you must scroll forward to do this, depress F10). Notice that the USOC 1ZJ has been formatted for you along with the correct usage package USOC, UPP02. Notice that your selected class of service has also been formatted at the top of your order. Look at the way your other selections have been formatted too.

- Place your cursor at the HOME position on the message line and enter the "CAN" command. Depress Enter. The terminal response is NEGOTIATION CANCELED.

You have just selected a class of service and COFFI has formatted it appropriately in the S&E section of your order. That's about all there is to negotiating a class of service on a N order - *congratulations*!

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Billing For Local Service

Billing

Regardless of which class of service a customer chooses, **LOCAL SERVICE IS ALWAYS BILLED ONE MONTH IN ADVANCE.**

For a customer with Flat Rate service, this is no big deal, right? Their local service charges are the same from month to month, year to year, as long as they have Flat Rate Service. But, *what about customers who choose ACP?*

As you've probably guessed, the folks who prepare the bills are good, but they are not mindreaders. For this reason, billing may sound a little complicated at first, but it won't be a mystery to you in a minute!

ACP customers will have usage charges in addition to the monthly charge for the type of local service they've selected. ***And,*** because we cannot anticipate what that usage will be "before the fact," local usage charges are billed one month in arrears (on the next bill). Simple of course, but a point you will want to make to your customers.

Also, when the customer receives the very first bill after service connection, local service will be billed from the date of service connection to the close of billing - to "catch up" **and** then from the date of the bill through the close of the next billing cycle. This could conceivably result in a two-month bill, something you will need to prepare your customer for.

Let's look at what the bill for **ACP** customer looks like. This page of the bill will be accessed by depressing F2 (then F8) from the BOCRIS Entry screen after entering the telephone number given to you by your Learning Advisor.

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Billing For Local Service

Billing (continued)

This information includes the Band(s) to which calls are made, number of calls and total number of minutes during both the peak and discount periods. This information will be tabulated for all bands included in the "capped" area. Calls to numbers outside the capped area will be grouped separately.

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Conclusion

A Few Things to Keep in Mind

- If a customer chooses ACP and elects to change to Flat Rate service within 120 days from the date of installation, he/she may do so at no charge.
- A combination of classes of service is not allowed on the same account. (You will sometimes establish two lines on the same N order.)
- A combination of ACP and Flat Rate service is not allowed on the same premises for the same customer. In other words, if I have a main line and an additional line, both billed in my name at the same location, both accounts must be the same class of service - either ACP Economy Business option, ACP Standard option or Flat Rate service.

Sales Application

The target market for ACP includes:

- businesses who call long-distance to areas included within the expanded local calling area
- businesses who mostly receive incoming calls and want a low-cost local calling option
- employers who need to monitor employees' (and sometimes customers') use of the telephone.
- businesses who want more control over the cost of their monthly telephone bills
- businesses who want to reduce their intraLATA long-distance charges.
- any customer whose market area includes a nearby community that is located in the expanded local calling area.

Even if customers are frequent callers, they may still enjoy the convenience and flexibility of ACP because of discount periods (8 p.m. to 8 a.m., Monday through Friday, excluding holidays, and weekends).

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Conclusion

Summary

In this lesson you have learned:

- what classes of service are available to small business customers in Mississippi on a New Connect order. (There are others your Learning Advisor will tell you about when you have completed this handout, but you know the important stuff already!)
- how to determine which class of service is best for your customer
- how to make your selection in COFFI
- how the class of service you choose will look on the service order when COFFI "sends" it to SONGS
- what local usage charges for ACP Economy Business and ACP Standard actually looks like on a customer's bill.

You've learned a lot!

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Checks For Understanding

Purpose To measure participant comprehension at specific intervals.

Directions You are allowed to use your OLD/Training Materials.

Your Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected.

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Participant Role-Plays

Purpose

Allow participants to practice system input and negotiation skills.

Directions

This next section is an activity that will allow you to practice system input and negotiation skills. This will consist of a role-play where the class will break into pairs. You should use the addresses assigned to you when acting as the customer. Each participant will have the opportunity to change to role-play as a customer and as a specialist.

Example:

Role-play A, the participant will act as a customer, Role-play B the same participant will act as the specialist.

You may use any training/job aids throughout the role-play. When acting as the specialist you are to stay in your role as much as possible. If you need to check on information you should ask to place the customer on hold to break the role-play. The participant acting as the customer starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary.

Advise the Learning Advisor when you have completed Role-play A. Once the role-play is complete the Learning Advisor will debrief the system input and answer any questions. The participants should now switch role and continue with Role-play B. Once Role-play B is complete the Learning Advisor will debrief and answer any questions.

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Participant Role-Play

Business Applications Specialist	Role-play A
Customer Profile	Bob Sneed Answerite Radio
Listed Name	Answerite Radio
Listed Address	Use address provided
Listing Information	Main listing to be Answerite Radio II. Will take specialist recommendation on Yellow Pages heading.
Billing Address	Use address provided
Services	1 Flat Rate business line

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Participant Role-Play, continued

Business Applications Specialist	Role-play B
Customer Profile	Marvin Goldstein Goldstein, Yurfest & Burns
Listed Name	Goldstein, Yurfest & Burns
Listed Address	Use address provided
Listing Information	Main listing to be Goldstein, Yurfest & Burns. Will take specialist recommendation on Yellow Pages heading.
Services	ACP Economy Business

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Basic Classes Of Service - Mississippi

Job Aid

Flat Rate (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
ACP and Flat Rate Service	A combination of ACP and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Area Calling Plan (ACP) - Economy Business and Standard	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are two choices: • **ACP Economy Business:** Customers pay the basic line charge plus the usage for local calls they originate. **USOC** is **1S8** plus Usage option package **USOC UPP01.** • **ACP Standard:** Customers pay an additional $6 charge for a local calling page that gives them a 20% discount on calls made to Bands A, B and C. **USOC** is **1ZJ** plus Usage option package **USOC UPP02.** **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS366 at the HOME position and depress F7

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LAG.

Mississippi

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The New Connect SB305C

Learning Advisor Guide Mississippi
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Learning Advisor Guide Mississippi

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Introduction

Objectives

At the conclusion of this lesson, participants will:

- understand the differences between the most commonly negotiated classes of service available to customers on a New Connect order
- have a basic understanding of how each class of service appears on a customer's bill
- be able to access the BAMS screen by NXX and give basic information regarding banding
- be able to select a class of service in COFFI and map it to an order
- have a working knowledge of other classes of service they may see later (2FB, B1M, and other state-specific grandfathered services)

Materials/ Supplies

- Handout
- Local Directory (1 per position)
- OLD

Advance Preparation

- Locate and review the Learning Advisor Guide for your state
- Familiarize yourself with the information provided on the various Basic Classes Of Service
- Review Participant Handout
- Secure any locally-provided brochures on Area Calling Plan (1 per participant). This will give participants an opportunity to read the information on these classes of service from a customer's point of view and will also acquaint them with the brochure/handout as a potential sales tool.

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Introduction, continued

Advance Preparation (continued

- Secure local information about Enhanced Area Calling Plan and Hernando Reverse Billing.
- Obtain a copy of a bill for a customer who subscribes to Local Usage Detail (LUD) for use during your explanation of LUD. Participants are not taught about LUD or the BIR FID in the handout.

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Introduction, continued

Introduction

SAY: The purpose of this course is to educate you about the Basic Classes Of Service (BCS) that are available to our business customers.

Overview

STATE: You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

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Introduction, continued

BCS Description

BOARD and **REVIEW:**

"Basic Class Of Service" (BCS) is the term given to the type of service line the customer has for their local calling.

For Example:

A customer may request a Flat Rate Class Of Service (1FB). What this means is that the customer may make an unlimited number of outgoing local calls for one flat monthly rate.

As almost everything we offer our customers, Basic Class of Service must be tariffed before it can be provided to our customers.

Because each state is regulated by a different Public Service Commission (PCS) not every BCS exists in every state.

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Introduction, continued

Optional Calling Plans (OCPs)

OCPs are specifically designed toll plans that creatively meet our customers' communications needs through various toll service plans without sacrificing quality, reliability or convenience.

In some states OCPs may be designated as Basic Classes Of Service.

Flat Rate Service

DISCUSS with participants:

Applicable in Alabama, Louisiana, Mississippi:

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Basic Local Exchange Service

Applicable in Tennessee and Kentucky:

Basic Local Exchange Service (or 1FB) service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses his/her telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

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Introduction, continued

Area Calling Service (ACS)/Area Calling Plan (ACP)

DISCUSS with participants:

Applicable in Alabama, Kentucky and Mississippi:

ACS/ACP allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call and,
- the time of day or night the call is placed

Local Optional Service

Applicable in Louisiana only:

Local Optional Service allows customers to pay a lower monthly access charge with additional usage charges based on:

- the number of calls
- the distance a call travels
- the length of a call and,
- the time of day or night a call is placed

Message Rate Service

Applicable in Tennessee only:

Message Rate Service (or 1MB) gives the customer the opportunity to reduce the charges for local service but it also somewhat limits the number of outgoing calls they can make for the reduced rate.

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Introduction, continued

RegionServ

Applicable in Tennessee only:

RegionServ is an optional usage-based local service plan. The basic features of the plan are:

- Low monthly access rates
- Control over bills because you pay for the local calls you make
- Price caps on local charges
- Extended, seven-digit local calling to some area that are otherwise long distance

Measured Rate Service

Applicable in Kentucky only:

Measured Rate Service is a usage sensitive local service that provides an option for a less costly service than the standard flat rate service.

Bands - not local calling area.

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Introduction, continued

Handout

Distribute the handout and allow participants about an hour to read through it. There is one terminal interaction for which participants have been given complete instructions including address. This practice takes participants through all the terminal commands from the beginning of a N order up through selecting a class of service in COFFI and "mapping" it to SONGS.

Please remind participants to cancel this practice order when the lesson is completed.

Summary

- Have participants return to a COFFI screen (any one in your NPA will do).
- Explain what "grandfathered" means and give examples of classes of service which have been "grandfathered."
- Point out the other classes of service which have not been taught in this lesson (e.g., B1M, 2FB, etc.). Point out the different USOCs for the classes of service which have been taught in the handout.
- Explain party line service; point out USOC examples.
- Introduce, explain and discuss Enhanced Area Calling Plan (and emphasize that it is limited to customers requesting service in the exchanges of Mize, Raleigh and Taylorsville only).
- Introduce, explain and discuss Hernando Reverse Billing. It is included in this lesson because customers who desire this service must also be ACP subscribers.

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Introduction, continued

Summary (continued)

- Explain zone mileage *(as appropriate for your state)*. Point out examples of mileage in RSAG/ORION and locate OLD examples.
- Explain Local Usage Detail (LUD) and point out the BIR FID in OLD.
- Have participants read about ACP in the Call Guide pages of the local directory.
- Solicit questions, or if you prefer, have participants ask questions of each other and be available for "back-up."
- This would be a good time to mention that **local service is billed one month in advance.** Explain this in a manner similar to:

  "Local service is billed one month in advance. Customers will be billed from the date of the bill up to the close of that month's billing period, so, in effect, if a customer pays his/her bill on time, they are actually "paid ahead" by a few days on local service through the close of that month's billing cycle.

  "When a customer's service is worked, local service is owed from the date after service connection up to the close of the billing period ***in addition to the full month which is billed in advance.*** Sometimes when a customer receives the first bill, he/she could theoretically be billed for almost two months of local service."

- Distribute/administer Checks For Understanding

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Introduction, continued

Terminal Exercse

Have the participants do a terminal action using the BCS screen. Practice choosing the different classes of service offered in your area. Have the participants locate in the NR portion of the order, the pre-populated 9LM CALC charge.

Continue this procedure until you feel the participants have an understanding of the Basic Class of Service screen.

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Checks For Understanding (CFU)

Purpose

To measure participant comprehension at specific intervals.

Set Up

- Explain the purpose of the Checks For Understanding and how they will be set up
- Work individually
- Each CFU will have a specific time frame for completion by participant
- CFU given to entire group at one time
- Participants are allowed to use OLD/Training Materials
- Health breaks before CFU session begins

Administration

- Participants are allowed to use OLD/Training Materials
- Learning Advisor must be present during entire CFU session
- Post "DO NOT DISTURB-REVIEW IN PROGRESS" sign on the door
- Regional review-no local variations
- CFU's & CFU trend sheets will become a part of the participant's training records
- Learning Advisor collects all CFUs at the end of each lesson
- The Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected

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Checks For Understanding (CFU), Continued

Feedback

- Each individual CFU has an answer sheet provided in the Learning Advisor's Guide
- CFU results should be provided to participant no later than the next class day following the CFU
- Individual participant CFU results should be entered on CFU trend sheet
- Copy of CFU trend sheet is forwarded to manager at end of class

Auditing

- Completed CFUs will be reviewed by Training Manager during observation sessions
- Audit will include verification that CFUs are kept secured at all times

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Checks For Understanding Questions

Participant

Name: _____

1) List the most common Basic Classes Of Service offered to business customers in your state:

_____

_____

2) Describe Flat Rate Service:

_____

_____

3) What three things does ACP offer customers?

_____

_____

_____

4) What charges apply to ACP?

_____

_____

5) What line on the BOCRIS screen identifies the exchange being accessed?

_____

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Checks For Understanding Questions (continued)

6) How do you identify the Local Toll Indicator?

_____

_____

7) Usage rate is not applied to what types of calls?

_____

_____

_____

8) How and where are local usage charges summarized?

_____

_____

9) What is the Flat Rate USOC?

_____

10) List the USOCs for ACP Economy Business and ACP Standard with Usage options packages:

_____

_____

_____

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Checks For Understanding Answers

1) List the most common Basic Classes Of Service offered to business customers in your state:

Flat Rate Service
Area Calling Plan (Economy Business and Standard)

2) Describe Flat Rate Service:

Flat Rate Service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area.

3) What three things does ACP offer customers?

A) A wider local (seven-digit dialing) calling area
B) More control over their telephone bills
C) Flexibility, because within ACP there are two choices - Economy Business and Standard

4) What charges apply to ACP?

A) Low monthly access charge
B) Additional Usage Charges

5) What line on the BOCRIS screen identifies the exchange being accessed?

Top Line

6) How do you identify the Local Toll Indicator?

Column 5 on the BAMS BOCRIS screen

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Checks For Understanding Answers (continued)

7) Usage rate is not applied to what types of calls?

A) Busy Numbers
B) SCB Repair Service
C) 911 Emergency Service
D) Operator
E) SCB Business Office
F) Numbers which do not answer

8) How and where are local usage charges summarized?

A) By Bands
B) Local Usage Summary column on customer's bill

9) What is the Flat Rate USOC?

1FB

10) List the USOC for LOS with Usage option package; LOSB with Usage option package:

A) ACP Economy Business: 1S8
B) ACP Standard: 1ZJ

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Learning Advisor Role-Play

Purpose

Allow participants to practice system input and negotiation skills.

Directions

- Explain to participants that this activity will allow all of them to practice system input.
- The Learning Advisor will acts as the customer and ask for volunteers or choose one participant to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information the specialist should ask to place their customer on hold to break the role-play.
- The Learning Advisor starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. All other participants will practice system input only.
- Once the role-play is complete the Learning Advisor will debrief and answer any questions.

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Learning Advisor Role-Play, Continued

Learning Advisor Role-Play	This role-play should be demonstrated for the entire class.
Customer Profile	Bill Lauver Justina Athletic Association
Listed Name	Justina Athletic Association
Listed Address	Use address provided
Listing Instructions	Main listing to be Justina Athletic Association. Will take specialist recommendation on Yellow Pages heading.
Billing Address	ATTN: Bill Lauver 1501 Old Lake Rd. Brandon, Louisiana
Credit	Mr. Lauver has never had service before. Use 123456789 as social security number.
Services	Mr. Lauver wants 1 Flat Rate business line, TTB, Maintenance, Call Waiting, 2 Calling Cards, AT&T as Long distance carrier, ACP* *NOTE: See restrictions on 1FB and LOSB

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Participant Role-Plays

Purpose Allow participants to practice system input and negotiation skills.

Directions See Participant Handout for details.

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Basic Classes Of Service - Mississippi

Job Aid

Flat Rate (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
ACP and Flat Rate Service	A combination of ACP and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Area Calling Plan (ACP) - Economy Business and Standard	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are two choices: ◦ **ACP Economy Business:** Customers pay the basic line charge plus the usage for local calls they originate. **USOC** is **1S8** plus Usage option package **USOC UPP01.** ◦ **ACP Standard:** Customers pay an additional $6 charge for a local calling page that gives them a 20% discount on calls made to Bands A, B and C. **USOC** is **1ZJ** plus Usage option package **USOC UPP02.** **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS366 at the HOME position and depress F7

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June 15 , 1996

Attached	Course SB305C/Lesson 7 - Basic Classes Of Service-Mississippi Learning Advisor Guide (Dated 06/96) Participant Handout (Dated 06/96)
Cancels	Course SB305C/Lesson 7 - Basic Classes Of Service-Mississippi (Dated 11/94)
Changes	SB305C/Lesson 7 has been revised to: • reformat information contained within the course • include General Information in the LA Guide which provides a description of the most commonly applied Basic Classes Of Service • include Checks For Understanding • include Role-play for Learning Advisor • include Participant Role-plays • include Job Aid
Effective Date	Upon receipt
Respondent	Sharon Judy, 404-321-8275

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Louisiana

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The New Connect SB305C

Student Handout Louisiana
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Student Handout Louisiana

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Basic Classes Of Service (BCS) - Louisiana

Overview

You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

Please read the entire handout and perform the terminal practice in the lesson just as you are instructed. When you have completed the handout, we will discuss some other things you'll need to have heard about in conjunction with classes of service.

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Basic Classes Of Service (BCS) - Louisiana

BCS Types

Business telephone customers in Louisiana have a choice of different types or classes of service. The most commonly offered of these are:

- Flat Rate
- Local Optional Service
- Local Optional Service-Option B

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Local Optional Service (LOS) and **Local Optional Service-Option B** (LOSB) offer customers:

- a wider local (seven-digit dialing) calling area
- more control over their telephone bills
- flexibility, because within LOSB there are two choices - Option 1, Economy and Option 2, Discount.

Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.

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Basic Classes Of Service (BCS) - Louisiana

BCS Types

These classes of service (unlike Flat Rate service) allow customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call

and

- the time of day or night the call is placed.

These variables apply only to outgoing calls.

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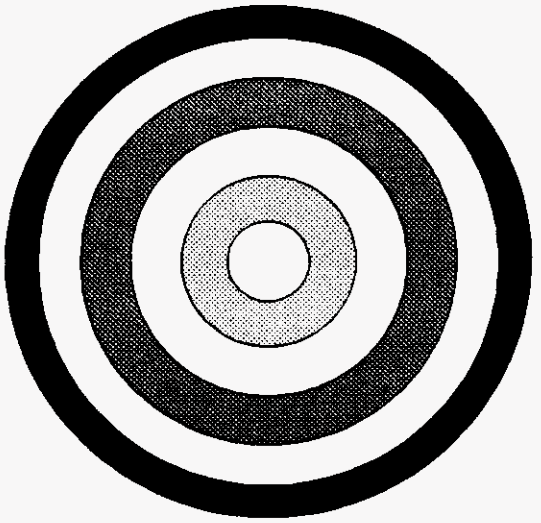
Local Optional Service/Local Optional Service-Option B

LOS/LOSB Options

LOS and LOSB are the options for customers who need an economical way to pay for telephone service. Both of these plans help make telephone service affordable for any type of business. With expanded local calling area, customers may call nearby numbers that were previously long distance (and still are for Flat Rate customers) for a local charge that is less than the long distance rate. AND...calls are made by dialing the seven-digit telephone number (instead of 1+ as with any local call.)

We said earlier that customers have flexibility because of the options within the service. In just a moment we'll take a closer look at these options, but first we'll look at a term you're about to see used with both options. That term is **BANDS**. Notice the "target" below.



The local (or seven-digit dialing) area is divided into bands. Think of banding as a target like you see above. Each circle radiating from the center is a "band." With LOS and LOSB the price of a call is determined, in part, by what band the call terminates in. The farther away from the center, the more the call will cost.

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB Options (continued)

When you are negotiating a class of service, the customer will sometimes want to know what exchanges fall into particular bands before making a decision about which plan will be most beneficial to his/her calling habits. BOCRIS gives you this information specific to every exchange in Louisiana where LOS and LOSB are available. Let's learn how you'll access this information

- If you are not already logged on to BOCRIS, please do so. When you reach the BOCRIS Entry screen you will enter the NPA in the designated field.
- Enter **318** in the NPA field and depress the **HOME** key.
- On the message line, enter **BAMS798** at the HOME position and depress **F7**. Does your screen look like the one below? Good! We'll briefly "tour" these screens now..

```
318                1 *INFO* BAMS 318798 MEASURED SERVICE DISTANCE    PAGE 1
  DEPRESS PF8 TO VIEW NEXT PAGE                                          NOLA

PLAN  BAND  1ST  ADDL LTI  C I T Y       N X X  O R  N P A - N X X
----- ---- ---- ---- --- ---------- ------------------------------------
LOSBX  A   XXXX  0.02  0             671
                       L  KEITHVILLE 925
                       L  SHREVEPOR  465
                       L  SHREVEPOR
227,241,464,469,621,632,675,676,677,678
                                     864
                       L  SHREVPT
221,222,226,320,424,425,429,455,456,458

459,631,635,636,670,673,674,679,683,686

687,688,741,742,746,747,861,862,863,865
                                     868,869
       B   0.06  0.04  X  BIG CANE   939
                       L  LANCHARD   929
                       L  REENWOOD   938
                       L  HAUGHTON   949,987
       C   0.10  0.07  L  BENTON     965
                       T  DOYLINE    745
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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB Options (continued)

- At the top, the screen is identified for you - BAMS318798 This lets you know the exchange the information is for. This is important since the banding is a little different for each wire center. Notice the message line prompt telling you to depress F8 to view subsequent pages.

- Let's look at each column of the next line individually:

- **PLAN** column tells you that this information is for LOSBX.

- **BAND** column shows you which band the information is for.

- **1ST** and **ADDL** columns display the rates for first and additional minutes.

- **LTI** (for Local Toll Indicator) column displays "L" for local, "T" for toll, "X" or "0" for does not apply or is not available.

- **CITY** column shows the community name for the exchanges.

- **NXX or NPA - NXX** column displays the NXXs included in each band.

- Scroll through the screens now by depressing F8. Notice that LOS banding information begins directly after LOSB information. This an important point. Make sure you are viewing the banding information for the correct plan because there are some differences.

Now that you've seen how the banding structure operates and you know how to access specific banding information for a particular NXX, let's look at each class of service option in greater detail.

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB (continued)

Flat Rate Service

When a customer wants unlimited use of the local network, he/she is conditioned to think "Flat Rate." Customers who subscribe to Flat Rate (1FB) service know exactly what their charge for local calling will be each month because it does not fluctuate with usage. However, unlike LOS and LOSB, ***Flat Rate customers do not enjoy the benefits of a wider 7-digit local calling area.***

LOS Option B

LOSB is by far the most flexible calling plan available to Louisiana customers and one that you will find many applications for. Within LOSB there are two options:

- **Economy** (Option #1)

- **Discount** (Option #2)

Let's look at both options now.

LOSB Economy (or Option 1) offers customers a reduced rate with somewhat limited calling. Customers pay a line charge of $26.25 plus usage charges. The usage charges are capped at $25.00 for Bands 0 through E. For calls made to Bands F through H there is no cap; however, these calls receive discount(s) during off-peak periods. Read about the discount periods first.

In OLD, locate the charts outlining discount periods for LOS and LOSB

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB (continued)

As you can see from these discount period charts, customers who make most (or many) of their calls during times other than "peak" periods receive a substantial discount toward their usage charges. This can be a real selling point for customers who are at work all day and are only home after 5 p.m. and on weekends and holidays when usage rates are discounted *by half.*

In addition to the USOC L1B for the LOSB Option 1 class of service, there is also a USOC for the usage package. It is UPPEL. COFFI/SONGS will format this usage package USOC for you when you select LOSB Option 1. (Remember it with the "E" for Economy).

LOSB Discount (or Option 2) offers customers a reduced rate with a built-in usage allowance. Customers who select Option 2 also pay a line charge of $26.25 plus they pre-pay for a $4.00 usage allowance which is applied toward any calls made to Bands 0 through E. Usage charges are capped at $21.00 (because the customer has pre-paid a $4.00 usage fee). Option 2 customers receive an *additional* 20% discount on the total usage charges, even after the 50% discount is applied (the 20% is applied before the cap). Where else can you find *anything* discounted by as much as 70%?! There is additional information regarding this subject in OLD. Find this information and read it now.

LOSB Option 1 also has a corresponding USOC for its usage package. Once you select LOSB Option 2 from the CLASS OF SVC/TOUCHTONE screen in COFFI, the system will format the usage package USOC for you, just as it does for Option 1. Option 2's usage package USOC is UPPDL. This USOC will also be easy to recognize since you'll remember that the "D" represents "Discount."

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB (continued)

LOSB Banding Information

Here is the banding structure for LOSB *(which is also found in OLD)*:

BAND	DISTANCE
0	zero miles (next door, around the corner, etc.)
A	1 - 10 miles
B	11 - 16 miles
C	17 - 22 miles
D	23 - 30 miles **INTRA-PARISH**
E	greater than 30 miles **INTRA-PARISH**
F	23 - 30 miles **INTER-PARISH**
G	31 - 40 miles **INTER-PARISH**
H	any wire center in an exchange located within 40 miles of any wire center in the originating exchange (**INTER-PARISH** distances greater than 40 miles)

The banding structure for both options of LOSB differs somewhat from the banding structure of LOS *(which we will look at next)*. Just be careful that you are giving a customer correct information for whichever service you are discussing.

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB (continued)

Local Optional Service (LOS)

A good way to present LOS to a customer is to explain that this option gives the stability of flat rate service within a local area and a reduced rate on long distance calls within a 40-mile radius. With LOS, mileage banding begins with band C *(this is a little different from LOSB, so if you need to return to the BAMS screen to look at how this is structured, feel free to do so now.)*

The USOC for the LOS class of service is **BUC**. Again, as with LOSB Options 1 and 2, the usage package USOC will be generated for you when you select the LOS class of service. In this case, the usage package USOC is UPPBL.

LOS Banding Information

The banding structure of LOS *(available in OLD)* is:

BAND	DISTANCE
C	1 - 10 miles
D	11 - 16 miles
E	17 - 22 miles
F	23 - 30 miles **INTRA-PARISH**
G	greater than 30 miles **INTRA-PARISH**
H	23 - 30 miles **INTER-PARISH**
I	31 - 40 miles **INTER-PARISH**
J	greater than 40 miles

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB (continued)

Important points to remember about LOS:

- The originating *and* terminating wire centers must be within the 40-mile radius or within the parish. 1+ or 7-digit local dialing is provided to all wire centers within the parish, even if the 40-mile limit is exceeded by doing so. **See OLD for more information.**
- There is a $25.00 cap on calls made to any number(s) in bands C through G.
- There is *NO CAP* (or maximum) for calls made to numbers in bands H through J.

Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll charges, etc.) apply and are additional to the charges mentioned above for LOS and for both options of LOSB.

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Local Optional Service/Local Optional Service-Option B (continued)

LOS/LOSB (continued)

Usage Rates

Usage rates apply for all outgoing calls, *except* calls to:

- busy numbers
- an operator
- SCB Repair Service
- SCB Business Office
- 911 Emergency Service
- numbers which do not answer

If you know the band to which a call is made, the length of the call and the time of day the call was placed you may use this information to determine the exact cost of a call.

- Access the subject **Local Optional Service** in OLD and read about LOS/LOSB.
- Find the section which gives you Band Rates. The information you are accessing will assist you in calculating cost-per-minute of calls to every band. This is not something you'll be asked to do with any regularity, but just to get a feel for what we're working with here, let's do a couple of examples.

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Local Optional Service/Local Optional Service-Option B (continued)

Local Usage Billing

Local usage charges are summarized by bands under the "Local Usage Summary" section of the customer's bill. Bands A, B, C and D are summarized individually and the charges are totaled. The usage allowance and the 20% discount (for Discount ACS) are applied to the total charges for Bands A, B, C and D. This information is available on the BOCRIS Item screen. It will look similar to this:

```
205 533 0602 040 *ITEM* FEB 26 1999 *LIVE*                    HTVL ACB
                                                                    BHAM
AMBROSIA'S            PB  317   STA      TAX NNNN                CC B MCC*C0548
22 COUNTRY CLB RD     RA        RTA      TAR 100777              288   DOI021293   A
SUITE 1209            RB  415   NT       TCL           DEP   -00
HUNTSVILLE AL 35816 PPD         CCH      AMT DUE        0.00
SCB CHARGES PG 0002 / 0003        MORE A00100      LU HIST3/0000 2/0000 P/0000
        Local Usage Summary For 205 533-0602
         Area Calling Service
                          -DAY            -NIGHT/WKND-
                                TOTAL                        TOTAL
              BAND       CALLS   MINS    CALLS    MINS     CHARGES
               A             8     29        0       0         .37
               B             3      7        1       8         .29
               C             0      0        4      43         .90
                                                             ------
                                                              1.56
  3.LOCAL USAGE CHARGE                                                1.56
                                        SUBTOTAL                      1.56

Taxes
  4.Federal Tax                                                       .47
  5.State/Local Tax                                                   .80
                                        SUBTOTAL                      1.27
    South Central Bell Current Charges                               37.56
```

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Local Optional Service/Local Optional Service-Option B (continued)

Local Usage Billing (continued)

Ambrosia's, a local dessert emporium, made calls to Bands A, B and C only, but any calls to Bands A, B, C and D are summarized as you see here. Bands E through G are summarized separately and totaled.

Okay, now you've got a pretty good idea about LOS/LOSB and how it is structured. You know what it looks like on a customer's bill. Next we'll look at the USOCs you'll use to populate LOSB and Flat Rate service on an order.

- when a customer wants the stability of flat rate service within a local area and a reduced rate on long distance calls within a 40-mile radius, the USOC you'll use is **BUC.**

- When a customer decides on Economy LOSB, the USOC is **L1B** plus the Usage option USOC **UPPEL.**

- When a customer selects Discount LOSB, the USOC is **L1B** plus the Discount Usage option USOC **UPPDL.**

When you select a class of service during order negotiation, COFFI will automatically format the correct usage package for the LOSB USOC you choose; you just need to familiarize yourself with what they look like so you'll recognize them when you see them on a CSR later.

- Go to OLD and find the chart which shows the usage USOCs.

Notice that even though the Economy options' "extra" USOC, UPPEL, does not generate a charge, it is still necessary in conjunction with the class of service USOC.

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Service Order Negotiation

Exercise

A combination of LOS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.

Let's take a look at how Flat Rate service and LOS/LOSB look in COFFI. Please go to the BOCRIS entry screen and perform the following steps exactly as you are instructed:

- Enter SO,NB on the message line and depress F12 or ENTER
- Enter your name in the CN field and depress the tab key
- Enter the address **6000 Kawanee Avenue** in the ADDR field
- Enter **METAIRIE** in the COM field *or* **70003** in the ZIP field
- Depress F8
- Correctly format your name in the ILN field
- In the IYPH field, enter NONE; in the ISIC field, enter 0000
- Enter any information you desire in the IBN1, IBA2 and IPO fields
- Depress F8 - notice the terminal response: **PREM MATCH**
- Enter any data you choose appropriately formatted in the ISS, ICI and ICC fields

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Service Order Negotiation, continued

Exercise (continued)

- *At the HOME position, enter =PREM and depress Enter*
- Accept the address by typing aa in the home position and depress Enter. When you have received the terminal response of the SO.N CR screen, depress F8. You are now on the Basic Services screen of COFFI.
- Beside CLASS OF SVC/TOUCHTONE enter an "X" and depress Enter. The screen you are now viewing is the CLASS OF SVC/TOUCHTONE screen which looks very similar to the one below.

```
318 678     209 S00001000 CLASS OF SVC/TOUCHTONE      GYGKNLX     SHAK NH8669
      ENTER VALID ACTION CODE/QUANTITY IN OPTION FIELD(S) AND DEPRESS S/R
CN    YOUR NAME          SW TYP  1A GEN 1AE11.05     LNA# 318 670 1220
DTF N TTP N   EXCH SHRV LATA SHPT   NOLA    CRIS
COS   17BSHPTLAMACG0000000000000000000040012318221          SHPTLAMACG0
OPT   FEATURE/PACKAGE          EXTENDED NAME                A/R   USOC/DATE  RATE
      INDIVIDUAL LINE          FLAT RATE-TWO WAY            A     1FB        36.47
      INDIVIDUAL LINE          FLAT RT-2 WAY W/CLR ID IA    A     1FBCL      36.47
      LOC OPT SVC-OPT B-LA     ECONOMY BUSINESS             A     L1B        26.25
      LOC OPT SVC-OPT B-LA     ECON BUS W/CALLER ID I.A     A     L1BCL      26.25
      LOC OPT SVC-OPT B-LA     DISCOUNT BUSINESS            A     3B         26.25
      LOC OPT SVC-OPT B-LA     DISCOUNT BUS W/CLR ID I A    A     L3BCL      26.25
      LOCAL OPT SVC-LA         TWO-WAY FLAT                 A     BUC  3      6.47
      LOCAL OPT SVC-LA         TWO-WAY FLAT W/CLR ID I.A    A     BUCCL      36.47
      LOCAL OPT SVC-LA         TWO-WAY MEASURED             A     2FD         ????
      TOUCHTONE                BUSINESS/PUBLIC              A     TTB         0.18
      NO MAINTENANCE CONTRACT  (NMC)                        A
      NON BASIC CUSTOMER       (ZNB)                        A
      OPTNL BASIC WIRING MTNC  PER LINE/PER PREMISE         A     SEQ1X       2.00
      CALLING CARD             UNRESTRICTED PIN             A     BSXUP       0.00
      END USER COMMON LINE     INTERST-RES/SINGL LN BUS     A     9LM         3.50
      END USER COMMON LINE     INTERSTATE-BUSINESS          A     9ZR         6.00
      SUBSCRIBER LINE CHARGE   TNTRAST-RES/SINGL LN BUS     A     9LP         2.00
MORE...   PF5=REV PF7=MENU PF8=RETURN PF10=FWD PF11=BCK PF12=BOCRIS  01 OF 02
```

Notice the choices in classes of service. Notice that Flat Rate service is given an "Individual Line" designation in COFFI *(don't let this confuse you; this is not an important issue, it's just different from how you've seen it referred to before)*. Once you help the customer determine which class of service best suits the needs of the customer you will make your selection.

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Service Order Negotiation, continued

Exercise (continued)

Do this now by placing an "I" beside ***LOCAL OPT SVC TWO-WAY FLAT (BUC).*** Depress the cursor tab or ENTER to move among your options and select one each of the following:

- TOUCHTONE
- OPTNL BASIC WIRING MTNC
- END USER COMMON LINE-Interst-RES/SINGL LN BUS
- SUBSCRIBER LINE CHG

You will learn a little later about continuing order negotiation to completion, but for now, depress F8. If your order (after depressing F10 to scroll forward) looks like this, you're definitely on the right track.

```
                    S,O,N S&E ID 99999              GYGKNLX RSAG NH8669

CN YOUR NAME                                  C         NR       R
SR AO VN 000 SI      RC BM PD - - ACYTI                          SOI   BF   G
TN ??? ???-???? SA   CC 209 CD - - EX SHRV AD 07-28-99  HU  1523 ID    07-28
ORD N5H86697  CS BUC SLS     ABCDEFF DD? - - AC AP W MA (Continued on next page
                                          ISIC 0000
                                          IFCTN318 221-6705;D
                                          --BILL
                                          IBN1 YOUR NAME
                                          IBA2 PO BOX 121
                                          IPO SHREVEPT LA 71105
                                          ICI JOES JUKE JOINT OWNR CBR & OS
                                          222-1111
                                          ITAR 301,708
                                          ISS (1) 123-45-6789;Y
                                          ICC C
                                          --S&E
                                      A   I1    BUC
                                      B   I1    UPPBL
#FLAG BDN;0L=02WD;CD=12-26.11-24.09-  C   I1    TTB
                                      D   I1    SEQ1X
                                      E   I1    9LM
                                      F   I1    9LP
```

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Service Order Negotiation, continued

Exercise (continued)

Look at the S&E section of your order (if you must scroll forward to do this, depress F10). Notice that the calls of service USOC BUC has been formatted for you along with the correct usage package USOC, UPPBL. Notice that your selected class of service has also been formatted at the top of your order. Look at the way your other selections have been formatted too.

Place your cursor at the HOME position on the message line and enter the "CAN" command. Depress Enter. The terminal response is NEGOTIATION CANCELED.

You have just selected a class of service and COFFI has formatted it appropriately in the S&E section of your order. That's about all there is to negotiating a class of service on a N order - *congratulations*!

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Billing For Local Service

Billing

Regardless of which class of service a customer chooses, **LOCAL SERVICE IS ALWAYS BILLED ONE MONTH IN ADVANCE.**

For a customer with Flat Rate service, this is no big deal, right? Their local service charges are the same from month to month, year to year, as long as they have Flat Rate Service. But, *what about customers who choose LOS or LOSB?*

As you've probably guessed, the folks who prepare the bills are good, but they are not mindreaders. For this reason, billing may sound a little complicated at first, but it won't be a mystery to you in a minute!

LOS and LOSB customers will have usage charges in addition to the monthly charge for the type of local service they've selected. ***And,*** because we cannot anticipate what that usage will be "before the fact," local usage charges are billed one month in arrears (on the next bill). Simple of course, but a point you will want to make to your customers.

Also, when the customer receives the very first bill after service connection, local service will be billed from the date of service connection to the close of billing - to "catch up" **and** then from the date of the bill through the close of the next billing cycle. This could conceivably result in a two-month bill, something you will need to prepare your customer for.

Let's look at what the bill for **LOSB Option 1** customer looks like. This page of the bill will be accessed by depressing F2 (then F8) from the BOCRIS Entry screen after entering the telephone number.

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Billing For Local Service

Billing (continued)

This information includes the Band(s) to which calls are made, number of calls and total number of minutes during both the peak and discount periods. This information will be tabulated for all bands included in the "capped" area. Calls to numbers outside the capped area will be grouped separately.

```
318 313 7009 980 *ITEM*JUN 23 1999  *LIVE*                          MRO LIB
                                                                       NOLA
JOE'S JUKE JOINT   PB 712     STA   60 TAX NNNN CC D MCC*C0512
 151 FREEDMONT ST  RA 713     RTA   50 TAR 301708     TBE   288   DOI060293   A
 MONROE            LA 71201   RB    XXX              NT    TCL   DEP   -00
 PPD  CCH1   AMT DUE          69.60 OTN 318 868 2257 980
 SCB CHARGES PG 0002 / 0002   A00100 MIN RATE IMSBLC X     AMT
Monthly Service Charge (continued)
       7.Late Payment (%5.0 of Unpaid Balance)                        5.19
                                                        Subtotal      30.80
       Local Usage Summary For 318 313-7009
                          -DAY           -NIGHT/WKND-
                                  TOTAL          TOTAL
            BAND          CALLS   MINS   CALLS   MINS        CHARGES
             0              99     120      94    213          3.73
             A              17      70      12     45          2.31
                                                               ------
                                                               6.04
       8.LOCAL USAGE CHARGE                                    6.04
                                                        Subtotal 6.04
```

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Billing For Local Service

Billing (continued)

Here's what the bill of an LOSB Option 2 customer will look like:

```
504 6931 1494151 *ITEM*JUN 23 1999  *LIVE*                          NAPV L3B
                                                                       NOLA
SWOOP KNITTING       PB  712   STA   60 TAX NNNN              CC D MCC C0512
PO BOX 80            RA  713   RTA   50 TAR 301708     TBE   288   DOI060293   A
NAPOLEONVL LA 70390  RB  XXX   NT    TCL   DEP   -00
                     PPD CCH1  AMT DUE     69.60   OTN 318 868 2257 980
SCB CHARGES PG0003 / 0007   A00100  MIN RATE IMSBLC X                  AMT
       Other Charges and Credits (continued)
        20.Installment payment number 1 of 4
                  for charges of $50.00 on Mar 23 99 for plan A    12.50
                                                    Subtotal       28.02
        Local Usage Summary For 504 693-1949
                              -DAY          -NIGHT/WKND-
                                    TOTAL           TOTAL
              BAND          CALLS   MINS    CALLS   MINS          CHARGES
               0              63     172       31    155           3.28
               A               6      15        1      8           2.51
               C               6      10       10     75           3.66
                                  20% DISCOUNT              1.49 CR
                                  USAGE ALLOWANCE           2.80 CR
        21.LOCAL USAGE CHARGE                                       3.16
```

Same principle, but ***notice the additional 20% discount*** has been applied. Remember, LOSB Option 2 offers this additional discount not applied to LOSB Option 1 accounts.

By now you've got the picture, but to be fair, let's look at what a customer's bill looks like when he/she subscribes to plain old LOS.

You'll find this bill exhibit at the top of the next page...

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Billing For Local Service

Billing
(continued)

```
318 334 2826 016 *ITEM*MAY 07 1999  *LIVE*                          NAPV BUC
                                                                      NOLA
HENRY LEROY          PB  526   STA   60 TAX NNNN              CC D MCC C0512
RT 9 BOX 42-C        RA  527   RTA   50 TAR 000748     TBE   288   DOI061683   A
BUNKIE  LA  71322    RB  XXX   NT    TCL   DEP   -00
                     PPD CCH   1     AMT DUE     69.60   OTN 318 868 2257 980
SCB CHARGES PG0002.1/0004   A00100  MIN RATE IMSBLC X                  AMT
       13.Inside Wire Maintenance                                      2.00
                 Total Optional Service                               13.19
                              Subtotal                                34.49
        Local Usage Summary For 318 334-2826
                              -DAY          -NIGHT/WKND-
                                     TOTAL          TOTAL
              BAND            CALLS  MINS    CALLS  MINS        CHARGES
               C                  0      0       0      0          .00
               D                  2      2       1      1          .15
               E                  0      0       0      0          .00
               F                  0      0       1      1          .07
               G                  0      0       0      0          0

                                          SUBTOTAL                  .22
```

Notice anything different? *Sure you did.* You recognized right away that this customer has no "built-in" allowance. You can also tell from the way the bill is itemized that calls beyond Band G would be itemized separately if there were any.

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Conclusion

A Few Things to Keep in Mind

- If a customer chooses LOS or LOSB and elects to change to Flat Rate service, he/she may do so at no charge.
- A combination of classes of service is not allowed on the same account. (You will sometimes establish two lines on the same N order.)
- A combination of LOS or LOSB and Flat Rate service is not allowed on the same premises for the same customer. In other words, if I have a main line and an additional line, both billed in my name at the same location, both accounts must be the same class of service - either LOS, LOSB (either option) or Flat Rate service.

Sales Application

The target market for LOS/LOSB includes:

- businesses who call long-distance to areas included within the expanded local calling area
- businesses who mostly receive incoming calls and want a low-cost local calling option
- employers who need to monitor employees' (and sometimes customers') use of the telephone.
- businesses who want more control over the cost of their monthly telephone bills
- businesses who want to reduce their intraLATA long-distance charges.
- any customer whose market area includes a nearby community that is located in the expanded local calling area.

Even if customers are frequent callers, they may still enjoy the convenience and flexibility of LOS/LOSB because of discount periods (5 p.m. to 8 a.m., Monday through Friday, excluding holidays, and weekends).

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Conclusion

Summary

In this lesson you have learned:

- what classes of service are available to small business customers in Louisiana on a New Connect order. (There are others your Learning Advisor will tell you about when you have completed this handout, but you know the important stuff already!)
- how to determine which class of service is best for your customer
- how to make your selection in COFFI
- how the class of service you choose will look on the service order when COFFI "sends" it to SONGS
- what local usage charges for LOS or LOSB-Option 1 and Option 2 actually looks like on a customer's bill.

You've learned a lot!

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Checks For Understanding

Purpose To measure participant comprehension at specific intervals.

Directions You are allowed to use your OLD/Training Materials.

Your Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected.

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Participant Role-Plays

Purpose

Allow participants to practice system input and negotiation skills.

Directions

This next section is an activity that will allow you to practice system input and negotiation skills. This will consist of a role-play where the class will break into pairs. You should use the addresses assigned to you when acting as the customer. Each participant will have the opportunity to change to role-play as a customer and as a specialist.

Example:

Role-play A, the participant will act as a customer, Role-play B the same participant will act as the specialist.

You may use any training/job aids throughout the role-play. When acting as the specialist you are to stay in your role as much as possible. If you need to check on information you should ask to place the customer on hold to break the role-play. The participant acting as the customer starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary.

Advise the Learning Advisor when you have completed Role-play A. Once the role-play is complete the Learning Advisor will debrief the system input and answer any questions. The participants should now switch role and continue with Role-play B. Once Role-play B is complete the Learning Advisor will debrief and answer any questions.

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Participant Role-Play

Business Applications Specialist	Role-play A
Customer Profile	Bob Sneed Answerite Radio
Listed Name	Answerite Radio
Listed Address	Use address provided
Listing Information	Main listing to be Answerite Radio II. Will take specialist recommendation on Yellow Pages heading.
Billing Address	Use address provided
Services	1 Flat Rate business line

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Participant Role-Play, continued

Business Applications Specialist	Role-play B
Customer Profile	Marvin Goldstein Goldstein, Yurfest & Burns
Listed Name	Goldstein, Yurfest & Burns
Listed Address	Use address provided
Listing Information	Main listing to be Goldstein, Yurfest & Burns. Will take specialist recommendation on Yellow Pages heading.
Services	Discount Local Optional Service (LOSB)

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Basic Classes Of Service - Louisiana

Job Aid

Flat Rate (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
LOS/LOSB and Flat Rate Service	A combination of LOS/LOSB and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Local Optional Service (LOS) and Local Optional Service-Options 1 and 2 - (LOSB)	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are two choices: • **LOS:** Provides 7-digit dialed local calling outside the Basic Local Calling Area but within the Expanded Local Calling Area. **USOC is BUC with Usage Option Package USOC UPPBL.** • **LOSB:** An optional offering that provides local calling to the Basic Local Calling Area and the Expanded Local Calling Area. **USOC is L1B with Usage Option Package USOCS - Option 1 - UPPEL for Economy and Option 2 - UPPDL for Discount.** **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: **• From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS798 at the HOME position and depress F7

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LAG.

Louisiana.

470.0600

May 31, 1996

Attached

Course SB305C/Lesson 7 - Basic Classes Of Service-Louisiana
Learning Advisor Guide (Dated 05/96)
Participant Handout (Dated 05/96)

Cancels

Course SB305C/Lesson 7 - Basic Classes Of Service-Louisiana (Dated 11/01/95)

Changes

SB305C/Lesson 7 has been revised to:

- reformat information contained within the course
- include General Information in the LA Guide which provides a description of the most commonly applied Basic Classes Of Service
- include Checks For Understanding
- include Role-play for Learning Advisor
- include Participant Role-plays
- include Job Aid

Effective Date

Upon receipt

Respondent

Sharon Judy, 404-321-8275

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The New Connect SB305C

Learning Advisor Guide Louisiana
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Learning Advisor Guide Louisiana

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Introduction

Objectives

At the conclusion of this lesson, participants will:

- understand the differences between the most commonly negotiated classes of service available to customers on a New Connect order
- have a basic understanding of how each class of service appears on a customer's bill
- be able to access the BAMS screen by NXX and give basic information regarding banding
- be able to select a class of service in COFFI and map it to an order
- have a working knowledge of other classes of service they may see later (2FB, B1M, and other state-specific grandfathered services)

Materials/ Supplies

- Handout

- Local Directory (1 per position)

- OLD

Advance Preparation

- Locate and review the Learning Advisor Guide for your state
- Familiarize yourself with the information provided on the various Basic Classes Of Service
- Review Participant Handout
- Secure any locally-provided brochures on LOS/LOSB (1 per participant). This will give participants an opportunity to read the information on these classes of service from a customer's point of view and will also acquaint them with the brochure/handout as a potential sales tool.

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Introduction, continued

Advance Preparation (continued

- Secure local information about Lifeline and Expanded Local Area Calling (ELAC) plans.
- Obtain a copy of a bill for a customer who subscribes to Local Usage Detail (LUD) for use during your explanation of LUD. Participants are not taught about LUD or the BIR FID in the handout.

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Introduction, continued

Introduction

SAY: The purpose of this course is to educate you about the Basic Classes Of Service (BCS) that are available to our business customers.

Overview

STATE: You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

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Introduction, continued

BCS Description

BOARD and REVIEW:

"Basic Class Of Service" (BCS) is the term given to the type of service line the customer has for their local calling.

For Example:

A customer may request a Flat Rate Class Of Service (1FB). What this means is that the customer may make an unlimited number of outgoing local calls for one flat monthly rate.

As almost everything we offer our customers, Basic Class of Service must be tariffed before it can be provided to our customers.

Because each state is regulated by a different Public Service Commission (PCS) not every BCS exists in every state.

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Introduction, continued

Optional Calling Plans (OCPs)

OCPs are specifically designed toll plans that creatively meet our customers' communications needs through various toll service plans without sacrificing quality, reliability or convenience.

In some states OCPs may be designated as Basic Classes Of Service.

Flat Rate Service

DISCUSS with participants:

Applicable in Alabama, Louisiana, Mississippi:

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Basic Local Exchange Service

Applicable in Tennessee and Kentucky:

Basic Local Exchange Service (or 1FB) service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses his/her telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

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Introduction, continued

Area Calling Service (ACS)/Area Calling Plan (ACP)

Applicable in Alabama, Kentucky and Mississippi:

ACS allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call and,
- the time of day or night the call is placed

Local Optional Service

DISCUSS with participants:

Applicable in Louisiana only:

Local Optional Service allows customers to pay a lower monthly access charge with additional usage charges based on:

- the number of calls
- the distance a call travels
- the length of a call and,
- the time of day or night a call is placed

Message Rate Service

Applicable in Tennessee only:

Message Rate Service (or 1MB) gives the customer the opportunity to reduce the charges for local service but it also somewhat limits the number of outgoing calls they can make for the reduced rate.

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Introduction, continued

RegionServ

Applicable in Tennessee only:

RegionServ is an optional usage-based local service plan. The basic features of the plan are:

- Low monthly access rates
- Control over bills because you pay for the local calls you make
- Price caps on local charges
- Extended, seven-digit local calling to some area that are otherwise long distance

Measured Rate Service

Applicable in Kentucky only:

Measured Rate Service is a usage sensitive local service that provides an option for a less costly service than the standard flat rate service.

Bands - not local calling area.

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Introduction, continued

Handout

Distribute the handout and allow participants about an hour to read through it. There is one terminal interaction for which participants have been given complete instructions including address. This practice takes participants through all the terminal commands from the beginning of a N order up through selecting a class of service in COFFI and "mapping" it to SONGS.

Please remind participants to cancel this practice order when the lesson is completed.

Summary

- Have participants return to a COFFI screen (any one in your NPA will do).
- Explain what "grandfathered" means and give examples of classes of service which have been "grandfathered."
- Point out the other classes of service which have not been taught in this lesson (e.g., B1M, 2FB, etc.). Point out the different USOCs for the classes of service which have been taught in the handout.
- Explain party line service; point out USOC examples.
- Introduce, explain and discuss Expanded Local Area Calling (ELAC).

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Introduction, continued

Summary (continued)

- Explain zone mileage *(as appropriate for your state)*. Point out examples of mileage in RSAG/ORION and locate OLD examples.
- Explain Local Usage Detail (LUD) and point out the BIR FID in OLD.
- Have participants read about LOS and LOSB in the Call Guide pages of the local directory.
- Solicit questions, or if you prefer, have participants ask questions of each other and be available for "back-up."
- This would be a good time to mention that **local service is billed one month in advance.** Explain this in a manner similar to:

  "Local service is billed one month in advance. Customers will be billed from the date of the bill up to the close of that month's billing period, so, in effect, if a customer pays his/her bill on time, they are actually "paid ahead" by a few days on local service through the close of that month's billing cycle.

  "When a customer's service is worked, local service is owed from the date after service connection up to the close of the billing period ***in addition to the full month which is billed in advance.*** Sometimes when a customer receives the first bill, he/she could theoretically be billed for almost two months of local service."

- Distribute/administer Checks For Understanding

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Introduction, continued

Terminal Exercse

Have the participants do a terminal action using the BCS screen. Practice choosing the different classes of service offered in your area. Have the participants locate in the NR portion of the order, the pre-populated 9LM CALC charge.

Continue this procedure until you feel the participants have an understanding of the Basic Class of Service screen.

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Checks For Understanding (CFU)

Purpose

To measure participant comprehension at specific intervals.

Set Up

- Explain the purpose of the Checks For Understanding and how they will be set up
- Work individually
- Each CFU will have a specific time frame for completion by participant
- CFU given to entire group at one time
- Participants are allowed to use OLD/Training Materials
- Health breaks before CFU session begins

Administration

- Participants are allowed to use OLD/Training Materials
- Learning Advisor must be present during entire CFU session
- Post "DO NOT DISTURB-REVIEW IN PROGRESS" sign on the door
- Regional review-no local variations
- CFU's & CFU trend sheets will become a part of the participant's training records
- Learning Advisor collects all CFUs at the end of each lesson
- The Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected

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Checks For Understanding (CFU), Continued

Feedback

- Each individual CFU has an answer sheet provided in the Learning Advisor's Guide
- CFU results should be provided to participant no later than the next class day following the CFU
- Individual participant CFU results should be entered on CFU trend sheet
- Copy of CFU trend sheet is forwarded to manager at end of class

Auditing

- Completed CFUs will be reviewed by Training Manager during observation sessions
- Audit will include verification that CFUs are kept secured at all times

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Checks For Understanding Questions

Participant

Name:_____

1) List the most common Basic Classes Of Service offered to business customers in your state:

_____

_____

2) Describe Flat Rate Service:

_____

_____

3) What three things does LOS/LOSB offer customers?

_____

_____

_____

4) What charges apply to LOS/LOSB?

_____

_____

5) What line on the BOCRIS screen identifies the exchange being accessed?

_____

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Checks For Understanding Questions (continued)

6) How do you identify the Local Toll Indicator?

_____

_____

7) Usage rate is not applied to what types of calls?

_____

_____

_____

8) How and where are local usage charges summarized?

_____

_____

9) What is the Flat Rate USOC?

_____

10) List the USOCs for LOS and LOSB with Usage options packages:

_____

_____

_____

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Checks For Understanding Answers

1) List the most common Basic Classes Of Service offered to business customers in your state:

Flat Rate Service
Local Optional Service, Local Optional Service-Option B

2) Describe Flat Rate Service:

Flat Rate Service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area.

3) What three things does LOS/LOSB offer customers?

A) **A wider local (seven-digit dialing) calling area**
B) **More control over their telephone bills**
C) **Flexibility, because within ACS there are two choice - Option 1-Standard ACS and Option 2-Discount ACS**

4) What charges apply to LOS/LOSB?

A) **Low monthly access charge**
B) **Additional Usage Charges**

5) What line on the BOCRIS screen identifies the exchange being accessed?

Top Line

6) How do you identify the Local Toll Indicator?

Column 5 on the BAMS BOCRIS screen

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Checks For Understanding Answers (continued)

7) Usage rate is not applied to what types of calls?

A) Busy Numbers
B) SCB Repair Service
C) 911 Emergency Service
D) Operator
E) SCB Business Office
F) Numbers *which do not answer*

8) How and where are local usage charges summarized?

A) By Bands
B) Local Usage Summary column on customer's bill

9) What is the Flat Rate USOC?

1FB

10) List the USOC for LOS with Usage option package; LOSB with Usage option package:

A) LOS: BUC plus the usage option USOC - UPPBL
B) LOSB - Option 1: L1B plus the usage option USOC - UPPEL
LOSB - Option 2: L1B plus the usage option USOC - UPPDL

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Learning Advisor Role-Play

Purpose

Allow participants to practice system input and negotiation skills.

Directions

- Explain to participants that this activity will allow all of them to practice system input.
- The Learning Advisor will acts as the customer and ask for volunteers or choose one participant to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information the specialist should ask to place their customer on hold to break the role-play.
- The Learning Advisor starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. All other participants will practice system input only.
- Once the role-play is complete the Learning Advisor will debrief and answer any questions.

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Learning Advisor Role-Play, Continued

Learning Advisor Role-Play	This role-play should be demonstrated for the entire class.
Customer Profile	Bill Lauver Justina Athletic Association
Listed Name	Justina Athletic Association
Listed Address	Use address provided
Listing Instructions	Main listing to be Justina Athletic Association. Will take specialist recommendation on Yellow Pages heading.
Billing Address	ATTN: Bill Lauver 2400 Decatur Street New Orleans, LA
Credit	Mr. Lauver has never had service before. Use 123456789 as social security number.
Services	Mr. Lauver wants 1 Flat Rate business line, TTB, Maintenance, Call Waiting, 2 Calling Cards, AT&T as Long distance carrier, LOSB* *NOTE: See restrictions on 1FB and LOSB

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Participant Role-Plays

Purpose	Allow participants to practice system input and negotiation skills.
Directions	See Participant Handout for details.

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Basic Classes Of Service - Louisiana

Job Aid

Flat Rate (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
LOS/LOSB and Flat Rate Service	A combination of LOS/LOSB and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Local Optional Service (LOS) and Local Optional Service-Options 1 and 2 - (LOSB)	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are two choices: ◦ **LOS:** Provides 7-digit dialed local calling outside the Basic Local Calling Area but within the Expanded Local Calling Area. **USOC is BUC with Usage Option Package USOC UPPBL.** ◦ **LOSB:** An optional offering that provides local calling to the Basic Local Calling Area and the Expanded Local Calling Area. **USOC is L1B with Usage Option Package USOCS - Option 1 - UPPEL for Economy and Option 2 - UPPDL for Discount.** **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS798 at the HOME position and depress F7

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Ho

Kentucky

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The New Connect SB305C

Student Handout Kentucky
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Student Handout Kentucky

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Basic Classes Of Service (BCS) - General

Overview

You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

Please read the entire handout and perform the terminal practice in the lesson just as you are instructed. When you have completed the handout, we will discuss some other things you'll need to have heard about in conjunction with classes of service.

End User Line Charge (EUCL)

End User Line Charge (EUCL) (also known as Customer Access Line Charge (CALC))

The End User Line Charge (EUCL) was ordered by the Federal Communications Commission (FCC) and was designed to allow the Bell Operating Companies (BOC) to recover some of the costs involved in maintaining the equipment and facilities which allow customers access to make and receive calls through the interstate toll network.

DOE will automatically populate this entry for you.

Every single-line new connect order must have a 9LM USOC in the S&E.

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Basic Classes Of Service (BCS) - General

End User Line Charge (EUCL) (continued)

You could explain the End User Line Charge by saying:

"The End User Line Charge covers some of the costs involved in maintaining equipment and facilities which allow access to make and receive calls through the interstate toll network."

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Basic Classes Of Service (BCS) - Kentucky

BCS Types

Business telephone customers in Kentucky have a choice between two types or classes of service:

- Basic Local Exchange Service and,
- Area Calling Service

Basic Local Exchange Service-1FB (also known as Flat Rate Service) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Area Calling Service (or ACS) offers customers:

- a wider local (seven-digit dialing) calling area
- more control over their telephone bills
- flexibility, because within ACS there are three choices - ACS with LUD, ACS Without LUD and ACS Premium

Basic Local Exchange customers do not enjoy the benefits of a wider seven-digit local calling area.

ACS allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call

and

- the time of day or night the call is placed.

These variables apply only to outgoing calls.

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Area Calling Service (ACS)

ACS Options

ACS is an option for customers who need an economical way to pay for telephone service. ACS helps make telephone service affordable for any type of business. With ACS's expanded local calling area, customers may call nearby numbers that are long distance for Flat Rate customers without incurring a toll charge and these calls may be made by dialing the seven-digit telephone number as with any local call.

We said earlier that ACS customers have flexibility because of the options within the service. In just a moment we'll take a closer look at these options, but first we'll look at a term you're about to see used with its options. That term is **BANDS.**

The local (or seven-digit dialing) area is divided into bands as you see below:

Lets talk about the different bands associated with ACS. Take time now to locate the Mileage Bands for ACS in OLD.

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Area Calling Service (ACS), continued

ACS Options (continued)

Bands A-C apply to calls within the customer's Limited Local Calling Area. This is important to note, because as you see from the chart in OLD, rates for these calls will vary based on the distance between the calling and the called location. This means, for example, that calls within the city of Louisville will be rated differently based on this banding.

Bands D-I apply to calls to the customer's additional exchanges.

Notice, too, that the rates are discounted for certain hours. 8:00 a.m. to 8:00 p.m., Monday through Friday, are considered Peak hours. Customers pay the full ACS usage rates for calls placed during this period. 8:00 p.m. to 8:00 a.m., Monday through Friday, and all day Saturday, Sundays, and on holidays is considered off-peak hours. Customers receive a 50% discount for these calls.

To make sure you understand how to apply these rates, let's look at a sample call to Band B. This call is in peak hours, and it lasts four minutes. The customer will pay $.10 for the call:

Initial Minute @ $.04 =		**$.04**
3 Additional Minutes @ $.02 =		**$.06**
Total Cost of Call =	**$.10**	

Now that you understand how usage is calculated for ACS, let's look at the following question.

How many calls can a customer make before reaching the breakeven point?

The answer is -- **it depends.**

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Area Calling Service (ACS), continued

ACS Options (continued)

Since each call is rated on a number of factors including time and distance, not all calls will cost the same. The number of calls that a customer can make before breaking even depends on:

- the customer's Rate Group
- who is called
- when calls are made
- how long he/she talks

The chart below demonstrates some of the variations you can find. According to Bell System statistics, the average local call lasts four minutes. Here we demonstrate how many four-minute calls per band during peak and non-peak hours an ACS customer with LUD could make during a billing month.

Rate Group	ACS Band A, Peak	ACS Band B, Peak	ACS Band C, Peak	ACS Band A, Non-Peak	ACS Band B, Non-Peak	ACS Band C, Non-Peak
1	43	22	12	87	43	20
2	60	30	17	121	60	34
3	74	37	21	148	74	41
4	87	43	24	174	87	48
5	121	61	34	242	121	67

SAMPLE LIMITED LOCAL CALLING USAGE

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Area Calling Service (ACS), continued

ACS Options (continued)

One thing you may notice from the preceding chart is that ACS provides greater savings to customers within the higher rate groups. These are the customers who may benefit most from the ACS savings on local service charges.

As you can see, as long as the customer stays below the breakeven point, ACS can lower the bill for local service. However, if he exceeds breakeven, ACS can raise his bill. This is where the Additional Exchanges area savings become critical.

As a rule of thumb, if your customer says that he/she makes a lot of local calls, ACS will probably not be a good choice unless he/she also makes long distance calls to the Additional Exchanges Areas. Previously, we said that calls to the Additional Exchanges are long distance for non-ACS subscribers. For ACS subscribers, these calls are local calls. The ACS subscriber gets the benefit of paying substantially less for these calls than for long distance calls. Even if ACS raises the customer's local service charges, savings on calls within the Additional Exchanges Area can offset this increase and still provide overall savings. A customer with fairly high usage within the Additional Exchanges Area may be a better candidate for the Premium Calling Usage Package.

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Area Calling Service (ACS), continued

ACS Options (continued)

Premium Calling

With the Premium Calling Usage Package, the customer pays a monthly access charge. An additional monthly charge *per line* is incurred to purchase unlimited outgoing calling within the Full Local Calling Area. Local Usage Detail is not available with this package.

For example, a customer in Louisville (Rate Group 5) could spend $29.50 ($9.50 for access line plus $20.00 Premium Calling Usage) per month and have unlimited calling to all of the following exchanges:

- Louisville (home exchange)
- LaGrange, West Point, Zoneton, and Indiana exchanges of Charlestown, Galena, New Albany, Sellersburg (this is the Louisville Limited Local Calling Area.)
- Finchburg, Shelbyville, Simpsonville, Taylorsville (these are the Louisville Additional Exchanges)

Premium Calling only benefits customers who currently make long distance calls to their Additional Exchanges. For most customers who do not call these exchanges, Premium Calling would more than double their bill.

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Area Calling Service (ACS), continued

ACS Options (continued)

When you are negotiating a class of service, the customer will sometimes want to know which exchanges fall into particular bands before making a decision about which plan will be most beneficial to his/her calling habits. BOCRIS gives this information specific to every exchange in Kentucky where ACS is available. Let's learn how you'll access this information

- If you are not already logged on to BOCRIS, please do so. When you reach the BOCRIS Entry screen you will enter the NPA in the designated field.
- Enter **502-239-6365 and/or the number provided by your Learning Advisor** in the NPA field and depress the **HOME** key.
- On the message line, enter **BAMS** at the HOME position and depress **F7**. Does your screen look like the one on the following page? Good! We'll briefly "tour" these screens now.

Continued on next page

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Area Calling Service (ACS), continued

ACS Options (continued)

```
502 239 6365 426   *INFO* BAMS 502239  MEASURED SERVICE DISTANCE       PAGE 1
   DEPRESS PF8 TO VIEW NEXT PAGE                                         LSVL

 PLAN   BAND  1ST   ADDL  LTI  C I T Y      N X X   O R   N P A - N X X
 ----- ----  ----  ---- --- ----------  ----------------------------------------
 ACSXX  A     0.02  0.01 L  XXXXXXXXXX   203,204
                         L   LOUISVILLE  231,239
        B     0.04  0.02 L   XXXXXXXXXX  479
                         L   LOUISVILLE  244,245,253,254,261,263,266,267,326,327
                                         329,332,336,339,340,341,342,344,346,392
                                         394,396,397,421,423,425,426,429,438,451
                                         452,454,455,456,458,459,464,473,478,485
                                         491,493,495,499,523,552,558,648,649,672
                                         675,682,693,752,873,891,893,894,895,896
                                         897,899,961,962,963,964,966,968,969,976
                         L  ZONETON      955,957
         C   0.06  0.04  L  CHARLESTN    812-256
                         L  GALENA       812-923
                         L  JEFFERSNVL   812-280,812-282,812-283,812-284,812-285
                                         812-288
                         L  LA GRANGE    222,225
                         L  LOUISVILLE   228,241,243,262,359,361,363,364,366,367
                                         368,374,375,447,448,449,540,541,544,550
```

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Area Calling Service (ACS), continued

ACS Options (continued)

- At the top, the screen is identified for you - BAMS502239. This lets you know the exchange the information is for. This is important since the banding is a little different for each wire center. Notice the message line prompt telling you to depress F8 to view subsequent pages.

- Let's look at each column of the next line individually:

- **PLAN** column tells you that this information is for ACS.

- **BAND** column shows you which band the information is for.

- **1ST** and **ADDL** columns display the rates for first and additional minutes.

- **LTI** (for **L**ocal **T**oll **I**ndicator) column displays "L" for local, "T" for toll, "X" or "0" for does not apply or is not available.

- **CITY** column shows the community name for the exchanges.

- **NXX or NPA - NXX** column displays the NXXs included in each band.

- Scroll through the screens now by depressing F8.

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Area Calling Service (ACS), continued

ACS Options (continued)

There are three available ACS plans:

- Standard Area Calling Service With Local Usage Detail (LUD)
- Discounted Area Calling Service Without LUD
- Premium Area Calling Service (no LUD available)

With the standard ACS offering, the customer pays a monthly access line rate and usage is based on an ACS rate schedule for all calls. As part of the service, with each bill, he/she can receive an itemized lst of all calls. This capabilty is called Local Usage Detail (LUD) (see next section). A customer that does not need LUD can subscribe to ACS without LUD.

With the Premium Calling Usage Package, the customer will pay the same monthly access line rate as for ACS without LUD. He/she can then purchase the Premium Calling Usage Package which provides unlimited usage within the Full Local Calling Area. LUD is not available with the Premium Calling Usage Package.

Usage-based expanded local calling plans such as ACS will provide incentvies for many of our customers by providing reduced rates for calls within the expanded service area. The savings that customers will have on long distance usage will offset any increase in local service so that the customer still recognizes overall savings.

NOTE: Standard ACS with LUD is the offered plan. Customers without a need for LUD are offered ACS without LUD as a discounted option.

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Area Calling Service (ACS), continued

ACS Options (continued)

Area Calling Service restrictions are:

- Standard and low-use not offered for new installation or transfers of service to a new location in locations where ACS is available. They may:

  1. modify or change existing arrangment at current location

  2. may not convert back to those services, after converting existing service to ACS

- ACS is not available to Party-Line subscribers or Shared Tenant Service

- Combination of ACS with LUD and ACS without LUD is allowed on the same premise; but, separate CSR's are required for this combination

- Combinations of Flat, Measured, Message or ACS with/without LUD and ACS Premium are not furnished:

  1. on the same premise to same subscriber

  2. in the same room to same subscriber

  3. to a group of different subscribers

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Area Calling Service (ACS), continued

ACS Options (continued)

Basic Local Exchange Vs. Measured Rate Vs. ACS:

To understand ACS, you need first to understand basic local exchange service and measured rate local service.

With basic local exchange service, a customer pays a monthly charge which includes unlimited incoming and outgoing calls within a local calling area. To place calls in this area, the customer dials a seven-digit number. To call someone outside the local calling area, he or she must dial 1 +7 or 10 digits and pay applicable long distance charges for the call.

With measured service, the customer pays a smaller monthly charge for unlimited incoming calls within the local calling area. Included in this charge is a usage allowance of outgoing calls that can be made within that area. If usage exceeds the allowed amount within the local calling area, the customer pays for each call which exceeds the allowance. In addition, the customer pays long distance charges for calls outside the local calling area. In Kentucky, Measured Service has been available only to customers who had subscribed to the service prior to January 19, 1984. This moratorium is still in effect. Existing Measured Service customers will retain their service, although they may request to convert to ACS if they feel it would be more beneficial.

ACS is similar to Measured Service in that the customer pays a reduced rate for monthly access service and then pays usage charges for outgoing calls. He/she receives unlimited incoming calls as part of the monthly access service charge. *Unlike Measured Service, with ACS, the customer pays for ALL outgoing calls. The customer doesn't get an allowance.* ACS is different from Measured Rate service in another very important respect: the customer's local calling area is expanded. Many calls which were once long distance for the customer become local calls within ACS plan.

Remember - the customer has the option of subscribing to Basic Local Exchange/Flat Rate, ACS, or any other local service as long as they are available. You will need to make sure you discuss the various local service options available to your customers whenever you are discussing new service or a change in service.

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Area Calling Service (ACS), *continued*

ACS Local Calling Area

With ACS, the customer's local calling area is expanded into two sections.

The first section is called the *Limited Local Calling Area.* This area is the same as the current flat rate and old measured rate local calling area. The ACS user pays small usage charges for each call placed within the Limited Local Calling Area.

The second portion of the ACS subscriber's local calling area is the expanded service area, which is called the *Additional Exchanges* Area. This area reaches out to exchanges which are long distance for customers with flat rate and measured rate. For the ACS subscriber, calls to the Additional Exchanges Area are local calls. These locations can be called by simply dialing seven digits. They will incur a local usage charge instead of long distance charges.

The greatest value to the customer is that ACS local usage charges for a call to the Additional Exchanges Area is substantially less expensive than a long distance call to the same location. Look in OLD and compare ACS rates with regular long distance to show the savings that ACS provides for calls within the Additional Exchanges Area.

Furthermore, for customers who have extremely high usage in the Additional Exchanges Area, ACS offers an even more cost-effective way to call that area. *Premium Calling Usage Package* which has already been reviewed in this lesson.

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Area Calling Service (ACS), continued

Sales Application

The target market for ACS includes:

- businesses who call long-distance to areas included within the expanded local calling area
- businesses who mostly receive incoming calls and want a low-cost local calling option
- employers who need to monitor employees' (and sometimes customers') use of the telephone. An individual listing of calls is available to any subscriber to ACS at an additional charge of $.01 per call. Your Learning Advisor will give you details later.
- businesses who want more control over the cost of their monthly telephone bills
- businesses who want to reduce their intraLATA long-distance charges.

Even if customers are frequent callers, they may still enjoy the convenience and flexibility of ACS because of discount periods (8 p.m. to 8 a.m., Monday through Friday, excluding holidays, and weekends).

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Area Calling Service (ACS), continued

Local Usage Detail (LUD)

Local Usage Detail (LUD) provides a complete itemization of all local calls. These are listed and rated individually. For each call the bill shows:

- Date
- Time of Day
- Called Number
- Time of Day Rate Classification
- Number of Minutes
- Amount of Charge

Restrictions of Local Usage Detail are:

- Local Measured Service allowance cannot be applied to the Local Usage Detail
- LUD must remain in place for complete billing period except where measured service is terminated
- No other charges are allowed when LUD established/removed on R order
- Ineligible for concession
- Local Usage Details can be requested for other measured area calling plans

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Area Calling Service (ACS), continued

Usage Rates

Usage rates apply for all outgoing calls, *except* calls to:

- busy numbers
- an operator
- SCB Repair Service
- SCB Business Office
- 911 Emergency Service
- numbers which do not answer

If you know the band to which a call is made, the length of the call and the time of day the call was placed you may use this information to determine the exact cost of a call.

- Access the subject **AREA CALLING SERVICE** in your OLD and read about ACS.

Find the section which gives you Band Rates. The information you are accessing will assist you in calculating cost-per-minute of calls to every band. This is not something you'll be asked to do with any regularity, but just to get a feel for what we're working with here, let's do a couple of examples.

A business customer with ACS Without Local Usage Detail makes a 15-minute call around 9 a.m., Tuesday, from his/her tanning salon to his/her mom who lives in Band C. How much did this call cost?_____

Now let's say that the customer called their Mom on Saturday afternoon instead of Tuesday morning. How much did the same call cost during the off-peak period? _____

(Check with your Learning Advisor to make sure you have the correct answer.)

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Area Calling Service (ACS), continued

Exercise

A combination of ACS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.

Let's take a look at how Flat Rate service and ACS look in COFFI. Please go to the BOCRIS entry screen and perform the following steps exactly as you are instructed:

- Enter SO,NB on the message line and depress F12 or ENTER
- Enter your name in the CN field and depress the tab key
- Enter the address **100 Main Street** in the ADDR field
- Enter **Maysville** in the COM field *or* the ZIP code **41056** in the ZIP field
- Depress F8
- Correctly format your name in the ILN field
- In the IYPH field, enter NONE; in the ISIC field, enter 0000
- Enter any information you desire in the IBN1, IBA2 and IPO fields
- Depress F8 - notice the terminal response: **PREM MATCH**
- Enter any data you choose appropriately formatted in the ISS, ICI and ICC fields

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Service Order Negotiation, continued

Exercise (continued)

- At the HOME position, enter =PREM and depress Enter
- Accept the address by typing aa in the home position and depress Enter. When you have received the terminal response of the SO,N CR screen, depress F8. You are now on the Basic Services screen of COFFI.
- Beside CLASS OF SVC/TOUCHTONE enter an "X" and depress Enter. The screen you are now viewing is the CLASS OF SVC/TOUCHTONE screen which should look similar the one below.

```
606 564      142           CLASS OF SVC/TOUCHTONE      PKNKMGX   SHAK NM2598
  ENTER VALID ACTION CODE/QUANTITY IN OPTION FIELD(S) AND DEPRESS S/R
 CN SHARON                    SW TYP  SBCR GEN REL-18       LNA# 502 557 2832
 DTF Y        TTP N  EXCH MYVL LATA WNCH

OP  FEATURE/PACKAGE   EXTENDED NAME                              A/R  USOC/DATE     RATE
    INDIVIDUAL LINE   FLAT RATE-TWO WAY                    A      1FB          28.10
    INDIVIDUAL LINE   FLAT RT-2 WAY W/CLR ID IA           A      1FBCL        28.10
    AREA CLG SVC-KY   INWARD WITH LUD                            A      B2K1D        27.00
    AREA CLG SVC-KY   INWARD W/O LUD                             A      B2K1K        27.00
    AREA CLG SVC-KY   INWARD-PREMIUM                       A     B2K1P        27.00
    AREA CLG SVC-KY   BOTH WAY WITH LUD                          A      B2K2D        30.00
    AREA CLG SVC-KY   BOTH WAY W/O LUD                           A      B2K2K        27.00
    AREA CLG SVC-KY   BOTH WAY-PREMIUM                           A      B2K2P        27.00
    TOUCHTONE         BUSINESS/PUBLIC                            A      TTB           3.00
    NO MAINTENANCE CONTRACT  (NMC)                               A
    NON BASIC CUSTOMER       (ZNB)                               A
    OPTNL BASIC WIRING MTNC  PER LINE/PER PREMISE                A      SEQ1X         2.00
    CALLING CARD             UNRESTRICTED PIN              A     BSXUP          0.00
    END USER COMMON LINE     INTERST-RES/SINGL LN BUS      A     9LM            3.50
    END USER COMMON LINE     INTERSTATE-BUSINESS           A     9ZR            6.00
    TROUBLE DETERMINATION CHG-PER LINE/PER PREMISES              A      TDG           0.25
    INSIDE WIRING            NO RATE                       A     OWWO2          0.00
 MORE...   PF5=REV PF7=MENU PF8=RETURN PF10=FWD PF11=BCK PF12=BOCRIS   01 OF 02
```

Notice the choices in classes of service. Notice that Flat Rate service is given an "Individual Line" designation in COFFI *(don't let this confuse you; this is not an important issue, it's just different from how you've seen it referred to before)*. Once you help the customer determine which class of service best suits the needs of the customer you will make your selection.

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Service Order Negotiation, continued

Exercise (continued)

Do this now by placing an "I" beside **AREA CLG SVC-KY Both Way With LUD.** Depress the cursor tab or ENTER to move among your options and select one each of the following:

- TOUCHTONE
- OPTNL BASIC WIRING MTNC
- END USER COMMON LINE-Interst-RES/SINGL LN BUS

You will learn a little later about continuing order negotiation to completion, but for now, depress F8.

- Look at the S&E section of your order (if you must scroll forward to do this, depress F10).

Notice that the USOC has been formatted for you. Notice, too, that your class of service USOC has been formatted at the top of the order. Look at the way your other selections have been formatted, too.

- Place your cursor at the HOME position on the message line and enter the "CAN" command. Depress ENTER. The terminal response is NEGOTIATION CANCELED.

You have just selected a class of service and COFFI has formatted it appropriately in the S&E section of your order. That's about all there is to negotiating a class of service on a N order - *congratulations*

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Conclusion

A Few Things to Keep in Mind

- If a customer chooses ACS and elects to change to Flat Rate service, he/she may do so at no charge.
- A combination of the Standard and Discount options is not allowed on the same account (you will routinely establish two lines on the same N order later).
- A combination of ACS and Flat Rate service is not allowed on the same premises for the same customer. In other words, if I have a main line and an additional line, both billed in my name at the same location, both accounts must be the same class of service - either Standard ACS, Discount ACS or Flat Rate service.

Summary

In this lesson you have learned:

- what classes of service are available to small business customers in Alabama
- how to determine which class of service is best for your customer
- how to make your selection in COFFI
- how the class of service you choose will look on the service order when COFFI "sends" it to SONGS
- what ACS usage looks like on a customer's bill.

You've learned a lot!

Your Learning Advisor will give you some additional information specific to Kentucky when everyone in your class has completed the lesson.

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Checks For Understanding

Purpose To measure participant comprehension at specific intervals.

Directions You are allowed to use your OLD/Training Materials.

Your Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected.

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Participant Role-Plays

Purpose

Allow participants to practice system input and negotiation skills.

Directions

This next section is an activity that will allow you to practice system input and negotiation skills. This will consist of a role-play where the class will break into pairs. You should use the addresses assigned to you when acting as the customer. Each participant will have the opportunity to change to role-play as a customer and as a specialist.

Example:

Role-play A, the participant will act as a customer, Role-play B the same participant will act as the specialist.

You may use any training/job aids throughout the role-play. When acting as the specialist you are to stay in your role as much as possible. If you need to check on information you should ask to place the customer on hold to break the role-play. The participant acting as the customer starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary.

Advise the Learning Advisor when you have completed Role-play A. Once the role-play is complete the Learning Advisor will debrief the system input and answer any questions. The participants should now switch role and continue with Role-play B. Once Role-play B is complete the Learning Advisor will debrief and answer any questions.

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Participant Role-Play

Business Applications Specialist	Role-play A
Customer Profile	Bob Sneed Answerite Radio
Listed Name	Answerite Radio
Listed Address	Use address provided
Listing Information	Main listing to be Answerite Radio II. Will take specialist recommendation on Yellow Pages heading.
Billing Address	Use address provided
Services	1 Basic Local Exchange/Flat Rate business line

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Participant Role-Play, continued

Business Applications Specialist	Role-play B
Customer Profile	Marvin Goldstein Goldstein, Yurfest & Burns
Listed Name	Goldstein, Yurfest & Burns
Listed Address	Use address provided
Listing Information	Main listing to be Goldstein, Yurfest & Burns. Will take specialist recommendation on Yellow Pages heading.
Services	Area Calling Service With LUD

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Basic Classes Of Service - Kentucky

Job Aid

Basic Local Exchange Service (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
ACS and Flat Rate Service	A combination of ACS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Area Calling Service (or ACS)	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are three choices: • **ACS With LUD (USOC is B2K2D)** provides an itemization of all calls terminating within Full Local Calling Area • **ACS Without LUD (USOC is B2K2K)** provides only a summary by bands of all calls in Full Local Calling Area • **ACS Premium (USOC is BREKX)** provides unlimited local calling in Full Local Calling Area **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS988 at the HOME position and depress F7

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Bands/Mileage - Kentucky

Job Aid

BAND	MILEAGE
A	Any number within the customer's own wire center
B	Wire centers from 1 to 10 miles away (Limited Local Calling Area - LLCA)
C	Any wire center greater than 10 miles beyond LLCA
D	Any wire center 1 to 10 miles beyond LLCA
E	Any wire center 11 to 16 miles beyond LLCA
F	Any wire center 17 to 22 miles beyond LLCA
G	Any wire center 23 to 30 miles beyond LLCA
H	Any wire center 31 to 40 miles beyond LLCA
I	Any wire center greater than 40 miles beyond LLCA

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LAG.

Kentucky

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The New Connect SB305C

Learning Advisor Guide Kentucky
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Learning Advisor Guide Kentucky

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470.0600

May 30, 1996

Attached Course SB305C/Lesson 7 - Basic Classes Of Service-Kentucky
Learning Advisor Guide (Dated 05/96)
Participant Handouts (Dated 05/96)

Cancels Course SB305C/Lesson 7 - Basic Classes Of Service-Kentucky (Dated 11/01/94)

Changes SB305C/Lesson 7 has been revised to:

- reformat information contained within the course
- include General Information in the LA Guide which provides a description of the most commonly applied Basic Classes Of Service
- include Checks For Understanding
- include Role-play for Learning Advisor
- include Participant Role-plays
- include Job Aid

Effective Date Upon receipt

Respondent Sharon Judy, 404-321-8275

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Introduction

Objectives

At the conclusion of this lesson, participants will:

- understand the differences between the most commonly negotiated classes of service available to customers on a New Connect order
- have a basic understanding of how each class of service appears on a customer's bill
- be able to access the BAMS screen by NXX and give basic information regarding banding
- be able to select a class of service in COFFI and map it to an order
- have a working knowledge of other classes of service they may see later (2FB, B1M, and other state-specific grandfathered services)
- Discuss the CALC charge with the customer
- Know how and what information to gather from the Carrier Screen

Materials/ Supplies

- Handout
- Local Directory (1 per position)
- OLD

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Introduction, continued

Advance Preparation

- Locate and review the Learning Advisor Guide for your state
- Familiarize yourself with the information provided on the various Basic Classes Of Service
- Review Participant Handout
- Secure any locally-provided brochures on Area Calling Service (1 per participant). This will give participants an opportunity to read the information on these classes of service from a customer's point of view and will also acquaint them with the brochure/handout as a potential sales tool.

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Introduction, continued

Introduction

SAY: The purpose of this course is to educate you about the Basic Classes Of Service (BCS) that are available to our business customers.

Overview

STATE: You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

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Introduction, continued

BCS Description

BOARD and REVIEW:

"Basic Class Of Service" (BCS) is the term given to the type of service line the customer has for their local calling.

For Example:

A customer may request Basic Local Exchange Service (1FB). What this means is that the customer may make an unlimited number of outgoing local calls for one flat monthly rate plus tax.

As almost everything we offer our customers, Basic Class of Service must be tariffed before it can be provided to our customers.

Because each state is regulated by a different Public Service Commission (PCS) not every BCS exists in every state.

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Introduction, continued

Optional Calling Plans (OCPs)

OCPs are specifically designed toll plans that creatively meet our customers' communications needs through various toll service plans without sacrificing quality, reliability or convenience.

In some states OCPs may be designated as Basic Classes Of Service.

Flat Rate Service

Applicable in Alabama, Louisiana, Mississippi:

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Basic Local Exchange Service

DISCUSS with participants:

Applicable in Tennessee and Kentucky:

Basic Local Exchange Service (or 1FB) service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses his/her telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

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Introduction, continued

Area Calling Service (ACS)/Area Calling Plan (ACP)

DISCUSS with participants:

Applicable in Alabama, Kentucky and Mississippi:

ACS allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call and,
- the time of day or night the call is placed

Local Optional Service

Applicable in Louisiana only:

Local Optional Service allows customers to pay a lower monthly access charge with additional usage charges based on:

- the number of calls
- the distance a call travels
- the length of a call and,
- the time of day or night a call is placed

Message Rate Service

Applicable in Tennessee only:

Message Rate Service (or 1MB) gives the customer the opportunity to reduce the charges for local service but it also somewhat limits the number of outgoing calls they can make for the reduced rate.

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Introduction, continued

RegionServ

Applicable in Tennessee only:

RegionServ is an optional usage-based local service plan. The basic features of the plan are:

- Low monthly access rates
- Control over bills because you pay for the local calls you make
- Price caps on local charges
- Extended, seven-digit local calling to some area that are otherwise long distance

Measured Rate Service

DISCUSS with participants:

Applicable in Kentucky only:

Measured Rate Service (grandfathered service) is a usage sensitive local service that provides an option for a less costly service than the standard flat rate service.

Bands - not local calling area.

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Introduction, continued

Handout

Distribute the handout and allow participants about an hour to read through it. There is one terminal interaction for which participants have been given complete instructions including address. This practice takes participants through all the terminal commands from the beginning of a N order up through selecting a class of service in COFFI and "mapping" it to SONGS.

Please remind participants to cancel this practice order when the lesson is completed.

Summary

- Have participants return to a COFFI screen (any one in your NPA will do).
- Explain what "grandfathered" means and give examples of classes of service which have been "grandfathered."
- Point out the other classes of service which have not been taught in this lesson (e.g. B1M). Point out the different USOCs for the classes of service which have been taught in the handout.
- Explain party-line service; point out USOC examples.

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Introduction, continued

Summary (continued)

- Explain zone mileage *(as appropriate for your state)*. Point out examples of mileage in RSAG/ORION and locate OLD examples.
- Explain Local Usage Detail (LUD) and point out the BIR FID in OLD.
- Have participants read about ACS in the Call Guide pages of the local directory.
- Solicit questions, or if you prefer, have participants ask questions of each other and be available for "back-up."
- This would be a good time to mention that **local service is billed one month in advance.** Explain this in a manner similar to:

  "Local service is billed one month in advance. Customers will be billed from the date of the bill up to the close of that month's billing period, so, in effect, if a customer pays his/her bill on time, they are actually "paid ahead" by a few days on local service through the close of that month's billing cycle.

  "When a customer's service is worked, local service is owed from the date after service connection up to the close of the billing period ***in addition to the full month which is billed in advance.*** Sometimes when a customer receives the first bill, he could theoretically be billed for almost two months of local service."

- Distribute/administer Checks For Understanding

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Introduction, continued

Terminal Exercise

Have the participants do a terminal action using the BCS screen. Practice choosing the different classes of service offered in your area. Have the participants locate in the NR portion of the order, the pre-populated 9LM CALC charge.

Continue this procedure until you feel the participants have an understanding of the Basic Class of Service screen.

Determination Of Mileage Bands

STATE: The tariff lists the Additional Exchanges for each exchange. However, you still need to know more about these exchanges -- you need to know the mileage bands into which each exchange falls.

The easiest way to determine banding is to use your BOCRIS BAMS screen Job Aid. To do this from the customer's CSR or bill, type "BAMS" on your BOCRIS message line and depress the F7 key. This will bring a listing of the exchanges within the customer's Full Local Calling Area and the band into which each exchange falls.

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Introduction, continued

SCC Charges

MUST WAIVE MANUALLY

STATE: For the first 90 days that ACS is available within an exchange, flat rate customers are not charged any SCC charges to change their service to ACS. Of course, if they change to ACS in conjunction with ordering some other services, then the appropriate SCC charges apply to those portions of their order. If a customer changes to ACS after this 90-day period, then he/she will pay the appropriate SCC charge.

Regardless of when the customer initially subscribes to ACS, for the next 90 days, he/she can change to flat rate service or to another version of ACS (such as changing from ACS with LUD to ACS without LUD or Premium Calling) without paying any SCC charges as long as he does not make more than one change per billing month. There are some special considerations on some orders involving LUD. These are detailed in the next section.

Local Usage Detail

STATE: Standard ACS provides Local Usage Detail (LUD). With LUD the customer receives an itemized list of all local calls similar to a long distance statement with the bill.

LUD can cause some problems with billing. Here are some guidelines for ordering LUD to prevent any problems from occurring:

- When initially subscribing to standard ACS, a customer may elect LUD and have it begin regardless of when the next billing period begins.
- When a customer terminates ACS with LUD or changes to flat rate, the billing period date does not matter.

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Introduction, continued

Local Usage Detail (continued)

- When a customer with ACS without LUD or Premium Calling wishes to add LUD, then the bill period date should be the effective date. The customer should notify us at least five days prior to that date.

- When a customer with ACS with LUD wishes to delete LUD, then the bill period date should be the effective date. The customer should notify us at least five days prior to that date.

If the last two guidelines are not followed, these problems will occur:

ACTION	PROBLEM
Add LUD in middle of bill period.	Customer will receive listings for entire month and be billed LUD for half a month.
Remove LUD in middle of bill period.	Customer will receive no listing but will be billed LUD for half a month.

(NOTE: You should be concerned only if the customer is already an ACS subscriber and adds or deletes LUD.)

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Introduction, continued

ACS Summary In summary,

- ACS provides the customer the potential to lower local calling charges. Your customer pays a reduced monthly fee and pays small charges for each call. By controlling the number of calls made, your customer can control the charges and save money.

- ACS also offers the customer the potential to lower long distance charges. ACS rates are substantially less expensive than regular long distance rates.

- The ACS Premium Calling Usage Package is the best service for customers whose long distance charges within the Additional Exchanges Area equal or exceed the amounts listed in OLD.

- Local Usage Detail is available as an option for standard ACS subscribers. It is not available for Premium Calling Usage subscribers.

A final note: Specialists can access COFFI to determine ACS USOCs and Rates. This information will be contained in the CLASS OF SVC/TOUCHTONE subscreen.

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Checks For Understanding (CFU)

Purpose

To measure participant comprehension at specific intervals.

Set Up

- Explain the purpose of the Checks For Understanding and how they will be set up
- Work individually
- Each CFU will have a specific time frame for completion by participant
- CFU given to entire group at one time
- Participants are allowed to use OLD/Training Materials
- Health breaks before CFU session begins

Administration

- Participants are allowed to use OLD/Training Materials
- Learning Advisor must be present during entire CFU session
- Post "DO NOT DISTURB-REVIEW IN PROGRESS" sign on the door
- Regional review-no local variations
- CFU's & CFU trend sheets will become a part of the participant's training records
- Learning Advisor collects all CFUs at the end of each lesson
- The Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected

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Checks For Understanding (CFU), Continued

Feedback

- Each individual CFU has answer sheet provided in the Learning Advisor's Guide
- CFU results should be provided to participant no later than the next class day following the CFU
- Individual participant CFU results should be entered on CFU trend sheet
- Copy of CFU trend sheet is forwarded to manager at end of class

Auditing

- Completed CFUs will be reviewed by Training Manager during observation sessions
- Audit will include verification that CFUs are kept secured at all times

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Checks For Understanding Questions

Participant

Name:_____

1) List the most common Basic Classes Of Service offered to business customers in your state:

_____

_____

2) Describe Basic Local Exchange Service:

_____

_____

3) What three things does ACS offer customers?

_____

_____

_____

4) What charges apply to ACS?

_____

_____

5) What line on the BOCRIS screen identifies the exchange being accessed?

_____

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Checks For Understanding Questions (continued)

6) How do you identify the Local Toll Indicator?

_____

_____

7) Usage rate is not applied to what types of calls?

_____

_____

_____

8) How and where are local usage charges summarized?

_____

_____

9) What is the Basic Local Exchange Service USOC?

_____

10) List the USOCs for ACS 2-Way Without LUD; ACS 2-Way With LUD; ACS Premium:

_____

_____

_____

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Checks For Understanding Answers

1) List the most common Basic Classes Of Service offered to business customers in your state:

Basic Local Exchange Service
Area Calling Service- With Local Usage Detail; Without Local Usage Detail;
ACS Premium

2) Describe Flat Rate Service:

Basic Local Exchange Service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area.

3) What three things does ACS offer customers?

A) **A wider local (seven-digit dialing) calling area**
B) **More control over their telephone bills**
C) **Flexibility, because within ACS there are three choices - ACS With LUD; ACS Without LUD; ACS Premium**

4) What charges apply to ACS?

A) **Low monthly access charge**
B) **Additional Usage Charges**

5) What line on the BOCRIS screen identifies the exchange being accessed?

Top Line

6) How do you identify the Local Toll Indicator?

Column 5 on the BAMS BOCRIS screen

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Checks For Understanding Answers (continued)

7) Usage rate is not applied to what types of calls?

A) Busy Numbers
B) SCB Repair Service
C) 911 Emergency Service
D) Operator
E) SCB Business Office
F) Numbers which do not answer

8) How and where are local usage charges summarized?

A) By Bands
B) Local Usage Summary column on customer's bill

9) What is the Basic Local Exchange Service USOC?

1FB

10) List the USOCs for ACS 2-Way Without LUD; ACS 2-Way With LUD; ACS Premium:

A) ACS Without LUD: B2K2K
B) ACS With LUD: B2K2D
C) ACS Premium: BREKX

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Learning Advisor Role-Play

Purpose

Allow participants to practice system input and negotiation skills.

Directions

- Explain to participants that this activity will allow all of them to practice system input.
- The Learning Advisor will acts as the customer and ask for volunteers or choose one participant to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information the specialist should ask to place their customer on hold to break the role-play.
- The Learning Advisor starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. All other participants will practice system input only.
- Once the role-play is complete the Learning Advisor will debrief and answer any questions.

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Learning Advisor Role-Play, Continued

Learning Advisor Role-Play	This role-play should be demonstrated for the entire class.
Customer Profile	Bill Lauver Justina Athletic Association
Listed Name	Justina Athletic Association
Listed Address	Use address provided
Listing Instructions	Main listing to be Justina Athletic Association. Will take specialist recommendation on Yellow Pages heading.
Billing Address	ATTN: Bill Lauver 100 Main Street Maysville, Kentucky 41056
Credit	Mr. Lauver has never had service before. Use 123456789 as social security number.
Services	Mr. Lauver wants 1 Basic Local Exchange business line, TTB, Maintenance, Call Waiting, 2 Calling Cards, AT&T as Long distance carrier, Area Calling Service With LUD *NOTE: See restrictions on 1FB and ACS

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Participant Role-Plays

Purpose Allow participants to practice system input and negotiation skills.

Directions See Participant Handout for details.

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Basic Classes Of Service - Kentucky

Job Aid

Basic Local Exchange Service (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
ACS and Flat Rate Service	A combination of ACS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Area Calling Service (or ACS)	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are three choices: • **ACS With LUD (USOC is B2K2D)** provides an itemization of all calls terminating within Full Local Calling Area • **ACS Without LUD (USOC is B2K2K)** provides only a summary by bands of all calls in Full Local Calling Area • **ACS Premium (USOC is BREKX)** provides unlimited local calling in Full Local Calling Area **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS988 at the HOME position and depress F7

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BANDS/MILEAGE JOB AID

BAND	MILEAGE
A	Any number within the customer's own wire center
B	Wire centers from 1 to 10 miles away (Limited Local Calling Area - LLCA)
C	Any wire center greater than 10 miles beyond LLCA
D	Any wire center 1 to 10 miles beyond LLCA
E	Any wire center 11 to 16 miles beyond LLCA
F	Any wire center 17 to 22 miles beyond LLCA
G	Any wire center 23 to 30 miles beyond LLCA
H	Any wire center 31 to 40 miles beyond LLCA
I	Any wire center greater than 40 miles beyond LLCA

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The New Connect SB305C

Student Handout Alabama
Issue 1 - May 1996

Performance Improvement Department

The New Connect

SB305C

Lesson 7: Basic Classes of Service

Student Handout Alabama

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Basic Classes Of Service (BCS) - Alabama

Overview

You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

Please read the entire handout and perform the terminal practice in the lesson just as you are instructed. When you have completed the handout, we will discuss some other things you'll need to have heard about in conjunction with classes of service.

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Basic Classes Of Service (BCS) - Alabama

BCS Types

Business telephone customers in Alabama have a choice between two types or classes of service:

- Flat Rate, and
- Area Calling Service

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Area Calling Service (or ACS) offers customers:

- a wider local (seven-digit dialing) calling area
- more control over their telephone bills
- flexibility, because within ACS there are two choices - Option 1, Standard ACS and Option 2, Discount ACS.

Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.

ACS allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call

and

- the time of day or night the call is placed.

These variables apply only to outgoing calls.

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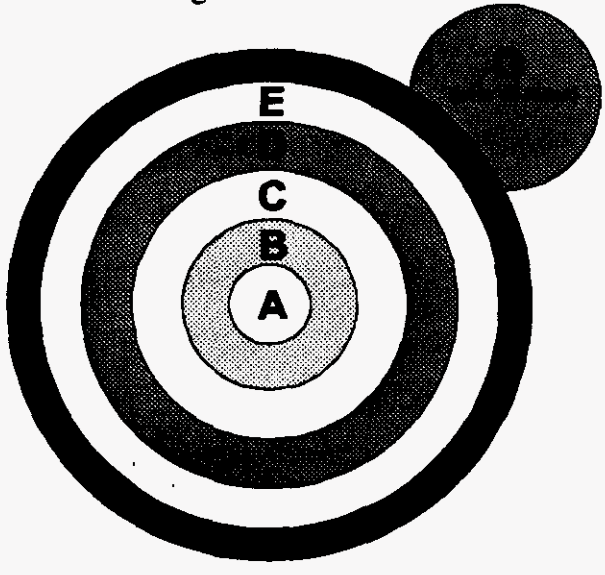
Area Calling Service (ACS)

ACS Options

ACS is the option for customers who need an economical way to pay for telephone service. Both Standard and Discount ACS help make telephone service affordable for any type of business. With ACS's expanded local calling area, customers may call nearby numbers that are long distance for Flat Rate customers without incurring a toll charge and these calls may be made by dialing the seven-digit telephone number as with any local call.

We said earlier that ACS customers have flexibility because of the options within the service. In just a moment we'll take a closer look at these options, but first we'll look at a term you're about to see used with both options. That term is **BANDS**. Notice the "target" below.



The local (or seven-digit dialing) area is divided into bands as you see here. Band A is any number within the customer's own wire center; Band B - wire centers from 1 to 10 miles away; Band C is any wire center 11 to 16 miles away; Band D - any wire center to 22 miles away; Band E is any wire center 23 to 30 miles away; Band F - any wire center 31 to 40 miles away. Band G is just a *little* different. If any wire center in an exchange is located within 40 miles of any wire center in the originating exchange, local calling will be provided from the entire originating exchange. The usage charges for Band G are applicable to distances greater than 40 miles.

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Area Calling Service (ACS), continued

ACS Options (continued)

When you are negotiating a class of service, the customer will sometimes want to know which 17 exchanges fall into particular bands before making a decision about which plan will be most beneficial to his/her calling habits. BOCRIS gives you this information specific to every exchange in Alabama where ACS is available. Let's learn how you'll access this information

- If you are not already logged on to BOCRIS, please do so. When you reach the BOCRIS Entry screen you will enter the NPA in the designated field.
- Enter **205** in the NPA field and depress the **HOME** key.
- On the message line, enter **BAMS988** at the HOME position and depress **F7**. Does your screen look like the one below? Good! We'll briefly "tour" these screens now..

```
318                1 *INFO* BAMS 318798 MEASURED SERVICE DISTANCE    PAGE 1
  DEPRESS PF8 TO VIEW NEXT PAGE                                        BHAM
RIVERCHASE

PLAN  BAND  1ST   ADDL LTI  C I T Y       N X X  O R  N P A - N X X
----- ---- ----  ---- --- ----------  ------------------------------------
ACSXX  A   0.02   0.01 L  BIRMINGHAM 403,444,560,733,985,987,988
                        L  ALABASTER  620,663,664
                        L  BESSEMER   424,425,426,428,481
                        X  BIRMINGHAM 817
                        L  BIRMINGHAM 290,531,558,780,781,783,785,786,787,788
                                      802,803,805,806,818,819,822,823,868,869
                                      870,871,877,879,888,906,916,917,918,923
                                      925,929,930,933,934,939,940,941,942,945
                                      951,954,956,960,967,969,970,972,975,977
                                      978,979,980,991,995
       B   0.06  0.04  L  BESSEMER   477,491,497
                        X  BIRMINGHAM 510,907
                        L  BIRMINGHAM 209,226,250,251,252,254,307,319,320,321
                                      322,323,324,325,326,327,328,458,521,581
                                      583,591,592,595,599,715,716,731,741,744
                                      792,798,801,808,833,836,838,841,849,902
                                      903,908,910,913,914,915,919,936,999
                        L  CHELSEA    678
```

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Area Calling Service (ACS), continued

ACS Options (continued)

- At the top, the screen is identified for you - BAMS205988. This lets you know the exchange the information is for. This is important since the banding is a little different for each wire center. Notice the message line prompt telling you to depress F8 to view subsequent pages.

- Let's look at each column of the next line individually:

- **PLAN** column tells you that this information is for ACS.

- **BAND** column shows you which band the information is for.

- **1ST** and **ADDL** columns display the rates for first and additional minutes.

- **LTI** (for Local Toll Indicator) column displays "L" for local, "T" for toll, "X" or "0" for does not apply or is not available.

- **CITY** column shows the community name for the exchanges.

- **NXX or NPA - NXX** column displays the NXXs included in each band.

- Scroll through the screens now by depressing F8.

Standard/ Discount ACS

Now that you've seen how the banding structure operates and you know how to access specific banding information for a particular NXX, let's look at our two usage options: **Standard ACS** and **Discount ACS**

With **Standard** ACS, customers pay the basic monthly rate *plus* usage charges for local calls they originate. Usage charges for Bands A, B, C and D are capped at $30.00 for business customers other than: Hospitals/Hotels/Motels, Guest/Patient rooms, Shared Tenant service. **There is no cap applied to calls to the other bands.**

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Area Calling Service (ACS), continued

Standard/ Discount ACS (continued)

Customers who subscribe to the **Discount** ACS option pay their basic monthly rate *plus* an additional $6.00 charge for a local calling package that gives them a 20% discount on all calls made to Bands A, B, C and D. No matter how many calls they make to Bands A, B, C and D the usage charges will not exceed the capped amount each month. **There is no cap nor is there a discount applied to calls to the other bands.**

Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above.

Usage Rates

Usage rates apply for all outgoing calls, *except* calls to:

- busy numbers
- an operator
- SCB Repair Service
- SCB Business Office
- 911 Emergency Service
- numbers which do not answer

If you know the band to which a call is made, the length of the call and the time of day the call was placed you may use this information to determine the exact cost of a call.

- Access the subject **AREA CALLING SERVICE** in your OLD and read about ACS.
- Find the section which gives you Band Rates. The information you are accessing will assist you in calculating cost-per-minute of calls to every band. This is not something you'll be asked to do with any regularity, but just to get a feel for what we're working with here, let's do a couple of examples.

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Area Calling Service (ACS), continued

Standard/ Discount ACS (continued)

A business customer with Standard ACS makes a 15-minute call around 9 a.m., Tuesday, from their tanning salon to their mom who lives in Band C. How much did this call cost?_____

Now let's say that the customer called their Mom on Saturday afternoon instead of Tuesday morning. How much did the same call cost during the off-peak period? _____

(Check with your instructor to make sure you have the correct answer.)

ACS Points To Remember

- Usage to Bands A, B, C and D is capped on both Standard and Discount options.
- Discount provides an additional 20% discount on calls to Bands A, B, C and D
- There is no cap or discount for calls to Bands E through G. Each call to these bands is billed at a less expensive rate than a long-distance call and the numbers in these bands may be reached without dialing 1+; however, caps and discounts do not apply.
- All calls (within either option) do, however, receive discounts during off-peak periods.

Sales Application

The target market for ACS includes:

- businesses who call long-distance to areas included within the expanded local calling area
- businesses who mostly receive incoming calls and want a low-cost local calling option
- employers who need to monitor employees' (and sometimes customers') use of the telephone. An individual listing of calls is available to any subscriber to ACS at an additional charge of $.01 per call. Your Learning Advisor will give you details later.

Continued on next page

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Area Calling Service (ACS), continued

Sales Application (continued)

- businesses who want more control over the cost of their monthly telephone bills
- businesses who want to reduce their intraLATA long-distance charges.

Even if customers are frequent callers, they may still enjoy the convenience and flexibility of ACS because of discount periods (8 p.m. to 8 a.m., Monday through Friday, excluding holidays, and weekends) and the $30.00 usage cap on Bands A, B, C and D.

Local Usage Billing

Local usage charges are summarized by bands under the "Local Usage Summary" section of the customer's bill. Bands A, B, C and D are summarized individually and the charges are totaled. The usage allowance and the 20% discount (for Discount ACS) are applied to the total charges for Bands A, B, C and D. This information is available on the BOCRIS Item screen. It will look very similar to this:

```
205 533 0602 040 *ITEM* FEB 26 1999 *LIVE*                    HTVL ACB
                                                                    BHAM
AMBROSIA'S           PB  317   STA      TAX NNNN                CC B MCC*C0548
22 COUNTRY CLB RD    RA        RTA      TAR 100777              288   DOI021293   A
SUITE 1209           RB  415   NT       TCL           DEP    -00
HUNTSVILLE AL 35816 PPD        CCH      AMT DUE        0.00
SCB CHARGES PG 0002 / 0003        MORE A00100      LU HIST3/0000 2/0000 P/0000
        Local Usage Summary For 205 533-0602
         Area Calling Service
                              -DAY            -NIGHT/WKND-
                                    TOTAL                     TOTAL
              BAND             CALLS    MINS    CALLS   MINS  CHARGES
               A                   8      29        0      0      .37
               B                   3       7        1      8      .29
               C                   0       0        4     43      .90
                                                                 -----
                                                                 1.56
  3.LOCAL USAGE CHARGE                                                  1.56
                                          SUBTOTAL                      1.56

 Taxes
  4.Federal Tax                                                          .47
  5.State/Local Tax                                                      .80
                                          SUBTOTAL                      1.27
    South Central Bell Current Charges                                 37.56
```

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Area Calling Service (ACS), continued

Local Usage Billing (continued)

Ambrosia's, a local dessert emporium, made calls to Bands A, B and C only, but any calls to Bands A, B, C and D are summarized as you see here. Bands E through G are summarized separately and totaled.

Okay, now you've got a pretty good idea about ACS and how it is structured. You know what it looks like on a customer's bill. Next we'll look at the USOCs you'll use to populate ACS and Flat Rate service on an order.

- When a customer wants Flat Rate service, the USOC you'll use is **1FB**.
- When a customer decides on Standard ACS, the USOC is **ACB** plus the Standard Usage option USOC **UPPE1**.
- When a customer selects Discount ACS, the USOC is **ASB** plus the Discount Usage option USOC **UPPS2**.

When you select a class of service during order negotiation, COFFI will automatically format the correct usage package for the ACS USOC you choose; you just need to familiarize yourself with what they look like so you'll recognize them when you see them on a CSR later.

- Go to the OLD and find the chart which shows the usage USOCs.

Notice that even though the Standard options' "extra" USOC, UPPE1, does not generate a charge, it is still necessary in conjunction with the class of service USOC.

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Service Order Negotiation

Exercise

A combination of ACS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.

Let's take a look at how Flat Rate service and ACS look in COFFI. Please go to the BOCRIS entry screen and perform the following steps exactly as you are instructed:

- Enter SO,NB on the message line and depress F12 or ENTER
- Enter your name in the CN field and depress the tab key
- Enter the address **2110 PARTRIDGE BERRY RD** in the ADDR field
- Enter **HOOVER** in the COM field *or* **35244** in the ZIP field
- Depress F8
- Correctly format your name in the ILN field
- In the IYPH field, enter NONE; in the ISIC field, enter 0000
- Enter any information you desire in the IBN1, IBA2 and IPO fields
- Depress F8 - notice the terminal response: **PREM MATCH**
- Enter any data you choose appropriately formatted in the ISS, ICI and ICC fields

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Service Order Negotiation, continued

Exercise (continued)

- At the HOME position, enter =PREM and depress Enter
- Accept the address by typing aa in the home position and depress Enter. When you have received the terminal response of the SO,N CR screen, depress F8. You are now on the Basic Services screen of COFFI.
- Beside CLASS OF SVC/TOUCHTONE enter an "X" and depress Enter. The screen you are now viewing is the CLASS OF SVC/TOUCHTONE screen which looks very similar to the one below.

```
 205 403      192 S00001000 CLASS OF SVC/TOUCHTONE      GYGKNLX  SHAK NRVQ13
 ENTER VALID ACTION CODE/QUANTITY IN OPTION FIELD(S) AND DEPRESS S/R
CN YOUR NAME                  SW TYPE 1A GEN1AE11.09       LNA# 205 557 2007
 DTF Y      TTP N  EXCH NHMS LATA BRHM              BHAM      CRIS
 COS 17BBRHMALRC98E00000000000000040015205988      BRHMALRC98E
DPT  FEATURE/PACKAGE        EXTENDED NAME          A/R  USOC/DATE     RATE
 INDIVIDUAL LINE          FLAT RATE-TWO WAY          A      1FB         50.54
 INDIVIDUAL LINE          FLAT RT-2 WAY W/CLR ID IA  A      1FBCL       50.54
 AREA CLG SVC-AL ONLY     BASIC OPTION 1-BUS         A      ACB         34.85
 AREA CLG SVC-AL ONLY     BAS OPT1 W/CLR ID IA-BUS   A      ACBCL       34.85
 AREA CLG SVC-AL ONLY     DISCOUNT-BUS               A      ASB         34.85
 AREA CLG SVC-AL ONLY     DISCOUNT W/CLR ID IA-BUS   A      ASBC        34.85
 TOUCHTONE                BUSINESS/PUBLIC            A      TTB         0.00
 NO MAINTENANCE CONTRACT  (NMC)                      A
 NON BASIC CUSTOMER       (ZNB)                      A
 OPTNL BASIC WIRING MTNC  PER LINE/PER PREMISE       A      SEQ1X       1.50
 CALLING CARD             UNRESTRICTED PIN           A      BSXUP       0.00
 END USER COMMON LINE     INTERST-RES/SINGL LN BUS   A      9LM         3.50
 END USER COMMON LINE     INTERSTATE-BUSINESS        A      9ZR         6.00
 INSIDE WIRING            NO RATE                    A      OWWO2       0.00
 MODULAR JACK OR INTERFACE-BASEBOARD                 A      RJ11C       0.00
 MODULAR JACK OR INTERFACE-WALL                      A      RJ11W       0.00
 STD JACK OR ENTR BRIDGE  -INSTALLATN OF MATERIALS   A      SCO         0.00
MORE... PF5=REV PF7=MENU PF8=RETURN PF10=FWD PF11=BCK PF12=BOCRIS      01 OF 02
```

Notice the choices in classes of service. Notice that Flat Rate service is given an "Individual Line" designation in COFFI *(don't let this confuse you; this is not an important issue, it's just different from how you've seen it referred to before).* Once you help the customer determine which class of service best suits the needs of the customer you will make your selection.

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Service Order Negotiation, continued

Exercise (continued)

Do this now by placing an "I" beside **AREA CLG SVC-AL ONLY DISCOUNT-BUS**, depress the cursor tab or ENTER to move among your options and select one each of the following:

- TOUCHTONE
- OPTNL BASIC WIRING MTNC
- END USER COMMON LINE-Interst-RES/SINGL LN BUS

You will learn a little later about continuing order negotiation to completion, but for now, depress F8.

- Look at the S&E section of your order (if you must scroll forward to do this, depress F10). If your order, after depressing F10 to scroll forward, looks like the one on the next page, *you're on the right track.*

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Service Order Negotiation, continued

Exercise
(continued)

```
                    S,O,N S&E ID 99999              GYGKNLX RSAG NNO573

CN YOUR NAME                                  C         NR       A
SR AO VN 000 SI                 .       RC BM PD  -   -  AC Y TI         SOI BF RG
TN ??? ???-???? SA    CC 138 CD -   EX BHMS AD 05-18-99   HU   0812 ID 05-18
ORD N1N0G733          CS ASB                SLS ABCDEFF DD? - - AC AP W MA
                                            IDZIP35244
                                            IFCTN;NEW INST
                                            --BILL
                                            IBN1 YOUR NAME
                                            IBA2 PO BOX 101
                                            IPO HOOVER AL 35244
                                            ICI SO OS 988-4531 CT CINDY TO
                                            TRT OR FOR ANY CHNGS
                                            ITAR 094,736
                                            ISS 424-22-4422;Y
                                            ICC C
                                             S&E
                                            A I1 ASB
#FLAG BDN; OL=02WD; CD=12-04; 12-03, 12-    B I1 UPPS2
      02, 12-01, 11-30, 11-29, 11-28,11 -   C I1 TTB
      27, WG-DHE                            D I1 SEQ1X
                                            E I1 9LM
```

Notice that the USOC ASB has been formatted for you **along with the correct usage package USOC - UPPS2.** Notice, too, that your class of service USOC has been formatted at the top of the order. Look at the way your other selections have been formatted, too.

- Place your cursor at the HOME position on the message line and enter the "CAN" command. Depress ENTER. The terminal response is NEGOTIATION CANCELED.

You have just selected a class of service and COFFI has formatted it appropriately in the S&E section of your order. That's about all there is to negotiating a class of service on a N order - *congratulations*!

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Conclusion

A Few Things to Keep in Mind

- If a customer chooses ACS and elects to change to Flat Rate service, he/she may do so at no charge.
- A combination of the Standard and Discount options is not allowed on the same account (you will routinely establish two lines on the same N order later).
- A combination of ACS and Flat Rate service is not allowed on the same premises for the same customer. In other words, if I have a main line and an additional line, both billed in my name at the same location, both accounts must be the same class of service - either Standard ACS, Discount ACS or Flat Rate service.

Summary

In this lesson you have learned:

- what classes of service are available to small business customers in Alabama
- how to determine which class of service is best for your customer
- how to make your selection in COFFI
- how the class of service you choose will look on the service order when COFFI "sends" it to SONGS
- what ACS usage looks like on a customer's bill.

You've learned a lot!

Your Learning Advisor will give you some additional information specific to Alabama when everyone in your class has completed the lesson.

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Checks For Understanding

Purpose To measure participant comprehension at specific intervals.

Directions You are allowed to use your OLD/Training Materials.

Your Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected.

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Participant Role-Plays

Purpose

Allow participants to practice system input and negotiation skills.

Directions

This next section is an activity that will allow you to practice system input and negotiation skills. This will consist of a role-play where the class will break into pairs. You should use the addresses assigned to you when acting as the customer. Each participant will have the opportunity to change to role-play as a customer and as a specialist.

Example:

Role-play A, the participant will act as a customer, Role-play B the same participant will act as the specialist.

You may use any training/job aids throughout the role-play. When acting as the specialist you are to stay in your role as much as possible. If you need to check on information you should ask to place the customer on hold to break the role-play. The participant acting as the customer starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary.

Advise the Learning Advisor when you have completed Role-play A. Once the role-play is complete the Learning Advisor will debrief the system input and answer any questions. The participants should now switch role and continue with Role-play B. Once Role-play B is complete the Learning Advisor will debrief and answer any questions.

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Participant Role-Play

Business Applications Specialist	Role-play A
Customer Profile	Bob Sneed Answerite Radio
Listed Name	Answerite Radio
Listed Address	Use address provided
Listing Information	Main listing to be Answerite Radio II. Will take specialist recommendation on Yellow Pages heading.
Billing Address	Use address provided
Services	1 Flat Rate business line

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Participant Role-Play, continued

Business Applications Specialist	Role-play B
Customer Profile	Marvin Goldstein Goldstein, Yurfest & Burns
Listed Name	Goldstein, Yurfest & Burns
Listed Address	Use address provided
Listing Information	Main listing to be Goldstein, Yurfest & Burns. Will take specialist recommendation on Yellow Pages heading.
Services	Discount Area Calling Service

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Basic Classes Of Service - Alabama

Job Aid

Flat Rate (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
ACS and Flat Rate Service	A combination of ACS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Area Calling Service (or ACS)	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are two choices: • **Option 1 - Standard ACS (USOC: ACB plus the Standard Usage option USOC UPPE1)** - customers pay the basic monthly rate plus usage charges for local calls they originate. See OLD (SUBJECT: Basic Local Exchange Service) for rates • **Option 2 - Discount ACS (USOC: ASB plus the Discount Usage option USOC UPPS2)**- customers pay their basic monthly rate plus an additional $6 charge for a local calling package that gives them a 20% discount on all calls made to Bands A, B. C and D. **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦**From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS988 at the HOME position and depress F7

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Basic Classes Of Service

SB305C/Lesson 7-Alabama

Learning Advisor Guide
Issue 1 - May 1996

Performance Improvement Department

Introduction

Objectives

At the conclusion of this lesson, participants will:

- understand the differences between the most commonly negotiated classes of service available to customers on a New Connect order
- have a basic understanding of how each class of service appears on a customer's bill
- be able to access the BAMS screen by NXX and give basic information regarding banding
- be able to select a class of service in COFFI and map it to an order
- have a working knowledge of other classes of service they may see later (2FB, B1M, and other state-specific grandfathered services)

Materials/ Supplies

- Handout
- Local Directory (1 per position)
- OLD

Advance Preparation

- Locate and review the Learning Advisor Guide for your state
- Familiarize yourself with the information provided for the various Basic Classes Of Service
- Review Participant Handout
- Secure any locally-provided brochures on Area Calling Service (1 per participant). This will give participants an opportunity to read the information on these classes of service from a customer's point of view and will also acquaint them with the brochure/handout as a potential sales tool.

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Introduction, continued

Advance Preparation (continued

- Secure local information about Alabama Extended Local Calling Plan (ELCP) for Bridgeport/Phoenix City/Stevenson customer and Ardmore 7-digit dialing (GSST, A3.10.3).

- Obtain a copy of a bill for a customer who subscribes to Local Usage Detail (LUD) for use during your explanation of LUD. Participants are not taught about LUD or the BIR FID in the handout.

Continued on next page

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Introduction, continued

Introduction

SAY: The purpose of this course is to educate you about the Basic Classes Of Service (BCS) that are available to our business customers.

Overview

STATE: You will want to offer your customers the type of basic local service that will provide them with the best possible telephone service tailored specifically to their needs. Therefore, it is very important that you carefully question potential customers before making your recommendation for the type of local service that you feel best suits the needs of that business.

It will usually become apparent to you while interviewing which option would best meet the needs of the customer. You will be able to make your class of service recommendation based on what your customer tells you about the calling habits of the business.

In this lesson you are going to learn about the classes of service most frequently offered to customers on New Connect orders. There are a few others we will talk about at the end of the lesson, but most customers will select one of the classes of service you are about to learn.

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Introduction, continued

BCS Description

BOARD and REVIEW:

"Basic Class Of Service" (BCS) is the term given to the type of service line the customer has for their local calling.

For Example:

A customer may request a Flat Rate Class Of Service (1FB). What this means is that the customer may make an unlimited number of outgoing local calls for one flat monthly rate.

As almost everything we offer our customers, Basic Class of Service must be tariffed before it can be provided to our customers.

Because each state is regulated by a different Public Service Commission (PCS) not every BCS exists in every state.

Continued on next page

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Introduction, continued

Optional Calling Plans (OCPs)

OCPs are specifically designed toll plans that creatively meet our customers' communications needs through various toll service plans without sacrificing quality, reliability or convenience.

In some states OCPs may be designated as Basic Classes Of Service.

Flat Rate Service

DISCUSS with participants:

Applicable in Alabama, Louisiana, Mississippi:

Flat Rate (or 1FB) provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses the telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

Basic Local Exchange Service

Applicable in Tennessee and Kentucky:

Basic Local Exchange Service (or 1FB) service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. No matter how much or how little a customer uses his/her telephone to make outgoing calls in the local calling area, the rate for the line is always the same, month after month. Some customers like it that way.

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Introduction, continued

Area Calling Service (ACS)/Area Calling Plan (ACP)

DISCUSS with participants:

Applicable in Alabama, Kentucky and Mississippi:

ACS allows customers to pay a low monthly access charge with additional charges (USAGE) based on:

- the number of calls placed
- the distance a call travels
- the length of the call and,
- the time of day or night the call is placed

Local Optional Service

Applicable in Louisiana only:

Local Optional Service allows customers to pay a lower monthly access charge with additional usage charges based on:

- the number of calls
- the distance a call travels
- the length of a call and,
- the time of day or night a call is placed

Message Rate Service

Applicable in Tennessee only:

Message Rate Service (or 1MB) gives the customer the opportunity to reduce the charges for local service but it also somewhat limits the number of outgoing calls they can make for the reduced rate.

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Introduction, continued

RegionServ

Applicable in Tennessee only:

RegionServ is an optional usage-based local service plan. The basic features of the plan are:

- Low monthly access rates
- Control over bills because you pay for the local calls you make
- Price caps on local charges
- Extended, seven-digit local calling to some area that are otherwise long distance

Measured Rate Service

Applicable in Kentucky only:

Measured Rate Service is a usage sensitive local service that provides an option for a less costly service than the standard flat rate service.

Bands - not local calling area.

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Introduction, continued

Handout

Distribute the handout and allow participants about an hour to read through it. There is one terminal interaction for which participants have been given complete instructions including address. This practice takes participants through all the terminal commands from the beginning of a N order up through selecting a class of service in COFFI and "mapping" it to SONGS.

Please remind participants to cancel this practice order when the lesson is completed.

Summary

- Have participants return to a COFFI screen (any one in your NPA will do).
- Explain what "grandfathered" means and give examples of classes of service which have been "grandfathered."
- Point out the other classes of service which have not been taught in this lesson (e.g. B1M). Point out the different USOCs for the classes of service which have been taught in the handout.
- Explain party line service; point out USOC examples.
- Introduce, explain and discuss Alabama Extended Local Calling Plan (ELCP) for Bridgeport, Phoenix City and Stevenson customers.

Continued on next page

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Introduction, continued

Summary (continued)

- Explain zone mileage *(as appropriate for your state)*. Point out examples of mileage in RSAG/ORION and locate OLD examples.
- Explain Local Usage Detail (LUD) and point out the BIR FID in OLD.
- Have participants read about ACS in the Call Guide pages of the local directory.
- Solicit questions, or if you prefer, have participants ask questions of each other and be available for "back-up."
- This would be a good time to mention that **local service is billed one month in advance.** Explain this in a manner similar to:

  "Local service is billed one month in advance. Customers will be billed from the date of the bill up to the close of that month's billing period, so, in effect, if a customer pays his/her bill on time, they are actually "paid ahead" by a few days on local service through the close of that month's billing cycle.

  "When a customer's service is worked, local service is owed from the date after service connection up to the close of the billing period ***in addition to the full month which is billed in advance.*** Sometimes when a customer receives the first bill, he could theoretically be billed for almost two months of local service."

- Distribute/administer Checks For Understanding

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Introduction, continued

Terminal Exercise

Have the participants do a terminal action using the BCS screen. Practice choosing the different classes of service offered in your area. Have the participants locate in the NR portion of the order, the pre-populated 9LM CALC charge.

Continue this procedure until you feel the participants have an understanding of the Basic Class of Service screen.

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Checks For Understanding (CFU)

Purpose

To measure participant comprehension at specific intervals.

Set Up

- Explain the purpose of the Checks For Understanding and how they will be set up
- Work individually
- Each CFU will have a specific time frame for completion by participant
- CFU given to entire group at one time
- Participants are allowed to use OLD/Training Materials
- Health breaks before CFU session begins

Administration

- Participants are allowed to use OLD/Training Materials
- Learning Advisor must be present during entire CFU session
- Post "DO NOT DISTURB-REVIEW IN PROGRESS" sign on the door
- Regional review-no local variations
- CFU's & CFU trend sheets will become a part of the participant's training records
- Learning Advisor collects all CFUs at the end of each lesson
- The Learning Advisor will lead discussion and provide the correct answers after all CFUs have been collected

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Checks For Understanding (CFU), Continued

Feedback

- Each individual CFU has answer sheet provided in the Learning Advisor's Guide
- CFU results should be provided to participant no later than the next class day following the CFU
- Individual participant CFU results should be entered on CFU trend sheet
- Copy of CFU trend sheet is forwarded to manager at end of class

Auditing

- Completed CFUs will be reviewed by Training Manager during observation sessions
- Audit will include verification that CFUs are kept secured at all times

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Checks For Understanding Questions

Participant Name:_____

1) List the most common Basic Classes Of Service offered to business customers in your state:

_____

_____

2) Describe Flat Rate Service:

_____

_____

3) What three things does ACS offer customers?

_____

_____

_____

4) What charges apply to ACS?

_____

_____

5) What line on the BOCRIS screen identifies the exchange being accessed?

_____

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Checks For Understanding Questions (continued)

6) How do you identify the Local Toll Indicator?

_____

_____

7) Usage rate is not applied to what types of calls?

_____

_____

_____

8) How and where are local usage charges summarized?

_____

_____

9) What is the Flat Rate USOC?

_____

10) List the USOC for ACS-Standard with Usage Option package and ACS-Discount with ACS Usage Option package:

_____

_____

_____

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Checks For Understanding Answers

1) List the most common Basic Classes Of Service offered to business customers in your state:

Flat Rate Service
Area Calling Service-Standard and Discount

2) Describe Flat Rate Service:

Flat Rate Service provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area.

3) What three things does ACS offer customers?

A) A wider local (seven-digit dialing) calling area
B) More control over their telephone bills
C) Flexibility, because within ACS there are two choice - Option 1-Standard ACS and Option 2-Discount ACS

4) What charges apply to ACS?

A) Low monthly access charge
B) Additional Usage Charges

5) What line on the BOCRIS screen identifies the exchange being accessed?

Top Line

6) How do you identify the Local Toll Indicator?

Column 5 on the BAMS BOCRIS screen

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Checks For Understanding Answers (continued)

7) Usage rate is not applied to what types of calls?

A) Busy Numbers
B) SCB Repair Service
C) 911 Emergency Service
D) Operator
E) SCB Business Office
F) Numbers which do not answer

8) How and where are local usage charges summarized?

A) By Bands
B) Local Usage Summary column on customer's bill

9) What is the Flat Rate USOC?

1FB

10) List the USOC for:

A) Standard ACS: ACB plus standard usage option USOC UPPE1
B) Discount ACS: ASB plus the discount usage option USOC UPPS2

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Learning Advisor Role-Play

Purpose

Allow participants to practice system input and negotiation skills.

Directions

- Explain to participants that this activity will allow all of them to practice system input.
- The Learning Advisor will acts as the customer and ask for volunteers or choose one participant to act as the specialist.
- Explain that the specialist is to stay in their role as much as possible. If they need to check on information the specialist should ask to place their customer on hold to break the role-play.
- The Learning Advisor starts the role-play with a call into the Business Office. The participant acting as the specialist will practice their negotiation skills as well as any input necessary. All other participants will practice system input only.
- Once the role-play is complete the Learning Advisor will debrief and answer any questions.

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Learning Advisor Role-Play, Continued

Learning Advisor Role-Play	This role-play should be demonstrated for the entire class.
Customer Profile	Bill Lauver Justina Athletic Association
Listed Name	Justina Athletic Association
Listed Address	Use address provided
Listing Instructions	Main listing to be Justina Athletic Association. Will take specialist recommendation on Yellow Pages heading.
Billing Address	ATTN: Bill Lauver 10249 Astronaut Ct. Birmingham, Alabama 35201
Credit	Mr. Lauver has never had service before. Use 123456789 as social security number.
Services	Mr. Lauver wants 1 Flat Rate business line, TTB, Maintenance, Call Waiting, 2 Calling Cards, AT&T as Long distance carrier, Area Calling Service* *NOTE: See restrictions on 1FB and ACS

Continued on next page

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Participant Role-Plays

Purpose Allow participants to practice system input and negotiation skills.

Directions See Participant Handout for details..

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Basic Classes Of Service - Alabama

Job Aid

Flat Rate (or 1FB)	Provides a line for the customer's unlimited use for a fixed monthly rate within the local calling area. **NOTE:** Flat Rate customers do not enjoy the benefits of a wider seven-digit local calling area.
ACS and Flat Rate Service	A combination of ACS and Flat Rate service **is only allowed** when there are different subscribers located at the same address but have separate accounts issued. They cannot share a communication or other key-type system.
Area Calling Service (or ACS)	**Offers:** • a wider local (seven-digit dialing) calling area • more control over telephone bills • flexibility, because within ACS there are two choices: • **Option 1 - Standard ACS (USOC: ACB plus the Standard Usage option USOC UPPE1)** - customers pay the basic monthly rate plus usage charges for local calls they originate. See OLD (SUBJECT: Basic Local Exchange Service) for rates. • **Option 2 - Discount ACS (USOC: ASB plus the Discount Usage option USOC UPPS2)**- customers pay their basic monthly rate plus an additional $6 charge for a local calling package that gives them a 20% discount on all calls made to Bands A, B. C and D. **NOTE:** Additional charges (for any optional products/services, 911 surcharges, taxes, subscriber line charges, mileage charges, toll calls, etc.) apply with both options and are additional to the charges mentioned above. • The local (or seven-digit dialing) area is divided into bands. To access the exchanges in the bands: ♦ **From BOCRIS entry screen:** • Enter NPA and depress HOME key • On the message line, enter BAMS988 at the HOME position and depress F7

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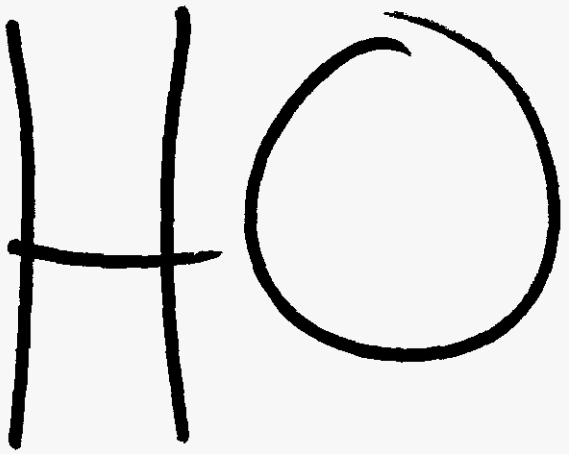

BELLSOUTH®

SB728
Consultative Sales

Handout
Issue 1 - June 1996

Performance Improvement Department

Lesson 1: Providing Service Through Consultative Sales

Handout

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Providing Service Through Consultative Sales

Lesson Objectives

Lesson Objectives

Upon completion of this lesson, you will be able to:

- Identify the BST Vision and Mission statements
- Define Consultative Sales
- Explain your role as the customer's knowledge link to BST products and services and demonstrate a willingness to take the lead
- Identify the characteristics of competitive readiness

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Course Overview

Overview

Welcome To Consultative Sales!

This course has been designed to teach you how to sell BST products/services that will not only meet your customers' needs but will exceed their expectations.

Upon completion of this course, you will be able to:

- Demonstrate ability to take a leadership role by establishing rapport and credibility with the small business customer
- Demonstrate ability to identify the customer's needs through asking open-ended questions
- Demonstrate ability to match BST products and services based on customer's environment and telecommunications needs
- Demonstrate ability to deal with conflict, overcome objections/excuses and close a sale.

The Lessons that will be covered in this course are:

- Lesson 1 - Providing Service Through Consultative Sales
- Lesson 2 -You Can . . . Take The Lead
- Lesson 3 -You Can . . . Disover Customer Needs!
- Lesson 4 - Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

This is the first lesson called Providing Service Through Consultative Sales.

Upon completion of this lesson, you will be able to:

- Identify the BST Vision and Mission statements
- Define Consultative Sales
- Explain your role as the customer's knowledge link to BST products and services and demonstrate a willingness to take the lead
- Identify the characteristics of competitive readiness

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BST Vision And Mission Statements

BST Vision And Mission Statements

BST's Small Business Vision and Mission statements were reviewed earlier in your training. However, let's take just a moment to review them once again.

BST Vision: To be the small business customer's first, most knowledgeable, and most responsive choice.

BST Mission: To identify, develop and deliver innovative communications solutions/applications that enable a small business to be more successful.

In order for BST to be the customer's first most knowledgeable and most responsive choice requires that we all continually increase our understanding of the small business customer and their business telecommunications needs.

To obtain our mission we must know how to identify the customer's needs and recommend a solution that will benefit their business.

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Consultative Sales

What Is Consultative Sales?

BST's Vision and Mission will be obtained through Consultative Sales. Consultative Sales is:

- Partnering with our small business customer
- Identifying their telecommunications needs
- Developing/selling recommended solutions
- Leaving our customer feeling confident and secure

Your Role In Consultative Sales

- **You** are the customer's link to our company
- **You** are the one that contains the knowledge of our products and services
- It will be **your** willingness to take the lead in consulting with the small business customer that will ensure our company's success

You are not just an order taker, but a valuable consultant who can help our customers with their business needs. To our customers, you are BellSouth. For the small business customer especially, you may be their only contact with the company. Therefore, it is important that you be the best possible ambassador of BellSouth's mission to this marketplace.

Consultative Sales Process

Consultative Sales Process Steps

The six basic steps in the Consultative Sales process are:

1) Take The Lead
2) Determine The Business Operating Environment
3) Uncover Potential Needs
4) Present a Packaged Solution
5) Close The Sale

There are various skills involved in the selling process, i.e., establishing rapport, identifying needs, etc. These skills will be closely reviewed and taught throughout this training course.

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Competitive Readiness

Competitive Readiness

You were taught about competition and its effect on our company earlier in your initial training . It is important that you remain constantly aware that our company must be competitively ready at all times. The only way to do this is by:

- Being the best-in-class provider of competitively priced telecommunications services, and
- Delivering customer care that is above par with leading service providers

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Lesson 2: You Can . . . Take The Lead

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Customer role-plays: Take the Lead	3
Observation Form for role-plays	4

For Learning Advisors/Coaches:

Learning Advisor/Coach's Observation Guidelines	5
Observation Form for Learning Advisors/coaches	6

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Observation For Audio Examples

	Audio Example #5	Audio Example #6	Audio Example #7
1. Acknowledge the customer's request and assured that they could help.			
2. Invited the customer to partner: • asked permission to get information • used their experience to position themselves as an expert.			
3. Asked a transition question.			

Ask these questions after each example:

- Did the specialists take a leadership role?
- What could they have done to improve the call?

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Customer Role-plays: Take the Lead

When it's your turn to be the customer, choose one of the statements below to say to the specialists.

1. Good morning, I'm Peggy Stark and I need to get a line for a new business I'm starting.

2. Hi, I'm Bob Jamison with L. W. Smith Enterprise. We are interested in adding Call Forwarding to one of our lines.

3. My name is Betsy Battle with the XYZ School Supply Co. We've added a modem to our computer and want to get it hooked up

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Observation Form for Role-plays

	Specialist 1	Specialist 2	Specialist 3
1. Acknowledge the customer's request and assured that they could help.			
2. Invited the customer to partner: • asked permission to get information • used their experience to position themselves as an expert.			
3. Asked a transition question.			
Ask these questions after each example: • Did the specialists take a leadership role? • What could they have done to improve the call?			

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Learning Advisors/Coach's Observation Guidelines

- Listen to at least three calls for each one of your specialist (or the first part of the calls when the specialist is Taking the Lead). Complete your observation form for each call.

- Meet with the specialist to discuss your observations.

- Be sure that the specialist understands:

  - the value of following all three steps.

  - what positive effects Taking the Lead can have on their conversation with a customer.

- Explain to the specialist what he/she can do differently to improve.

- Schedule time with the branch/team managers to discuss your observations. Share your successes and concerns as well as your plans for developing the specialist.

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Observation Form for Learning Advisor/Coaches

Specialists name: _____	**What I observed (Specialist's Statement)**	**Comments**
1. Acknowledge the customer's request and assured that they could help.		
2. Invited the customer to partner: • asked permission to get information • used their experience to position themselves as an expert.		
3. Asked a transition question.		

Ask these questions after each example:
- Did the specialists take a leadership role?
- What could they have done to improve the call?

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Lesson 2: You Can . . . Take The Lead

Reference Material

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Team Practice	8
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Our Vision, Mission and Goal

Vision

To be the small business customer's first, most knowledgeable and most responsive choice.

Mission

To identify, develop and deliver innovative communications solutions/applications that enable a small business to be ore successful.

Goal

To provide needs-based proposals that reflect the requirements of our small business market segment.

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Learning Objectives for this lesson:

After participating in this session you will be able to:

- Explain why it's important to help our small business customer succeed in today's business environment.
- Explain why all BellSouth Small Business Specialists must seek opportunities to be more problem solving and consultative.
- Demonstrate the ability to establish rapport and credibility with our small business customer.
- Position you and BellSouth as the telecommunications expert.
- Apply techniques for taking the lead in conversations with customers

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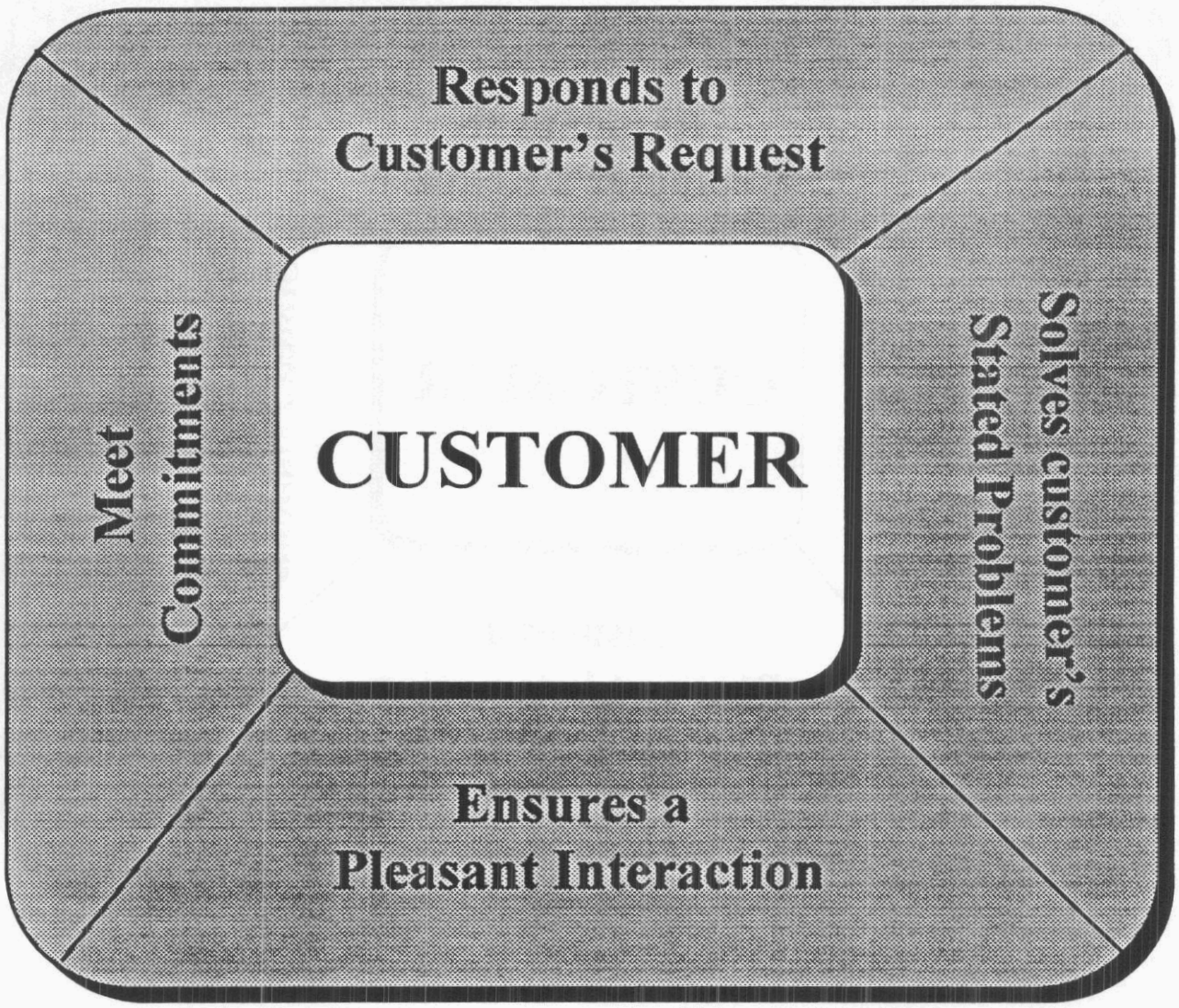
The Traditional View of Serving Customers

A Responsive Approach



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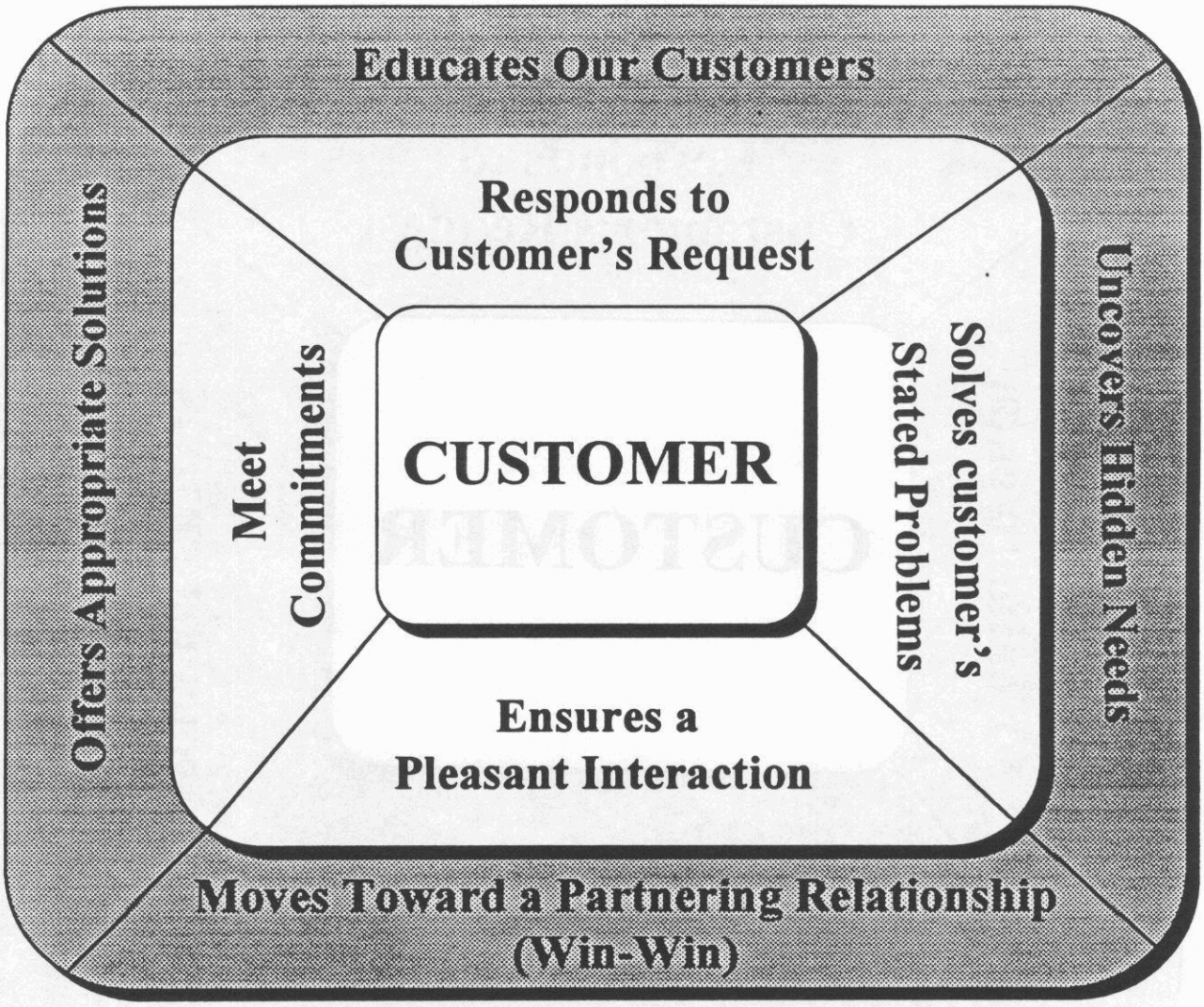
A Proactive Approach

Helping Customers Make Good Business Decisions



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Steps in a Successful Sale

Step 1 Take the lead

Step 2 Determine the business operating environment

Step 3 Uncover potential needs

Step 4 Present a packaged solution

Step 5 Close the sale

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Importance of Taking the Lead

Taking the Lead:

Taking a leadership role in the conversation in order to:

- Understand and uncover the customer's telecommunication needs.

- Develop comprehensive solutions that address those needs and truly add value to our customer's business.

Steps in Taking the Lead:

1. Acknowledge the customer and give assurance that you can be of help with their stated need.

    - The customer feels that the specialist is listening and is interested in them. (establishing rapport)

    - The customer feels that the specialist sincerely wants to help and has the ability to help. (establishing credibility)

2. Invite the customer to partner with you in finding the appropriate solution for them

    - Ask for permission to get more information.

    - Use your knowledge, experience and BellSouth's leading edge technology to position yourself as a problem-solver and an expert.

3. Ask a transition question.

    - Ask a broad open question such as "Would you tell me about your business?"

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Team Practice
Take the Lead Reinforcement Exercise

Following this session you will be practicing Taking the Lead with your customers. Your Learning Advisor and/or Coach will be observing and helping you apply this technique.

During the rest of your training continue to do the following:

- Consciously practice Taking the Lead with at least three customers and make notes on the attached self evaluation form about the conversations. Use on evaluation form for each conversation.

- Additionally, have your Learning Advisor and/or Coach listen to at least two calls and discuss your application of Taking the Lead. Identify strengths and additional techniques to practice.

(Optional)

- Work with a buddy to record and evaluate the conversations that you and he/she have had with at least two customers.

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Taking the Lead: Self Assessment Form

Customer's initial request:

Make notes on what you said during the call:

What did you say to acknowledge and to assure that you could help?

What did you say to invite them to partner?

- To ask permission to get more information?
- To state your ability to help?

What transition question did you ask?

What effect did Taking the Lead have on the customer?

What would you do differently next time?

If you did not Take the Lead, why not?

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Taking the Lead: Self Assessment Form

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What effect did Taking the Lead have on the customer?

What would you do differently next time?

If you did not Take the Lead, why not?

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Lesson 3: You Can . . . Discover Customer Needs!

Handout

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Welcome to
You Can . . .
Discover Customer Needs

Steps in a Successful Sale

- Take the Lead
- Determine the Business Operating Environment
- Uncover Potential Needs
- Present a Total Solution
- Close the Sale!

Taking the Lead

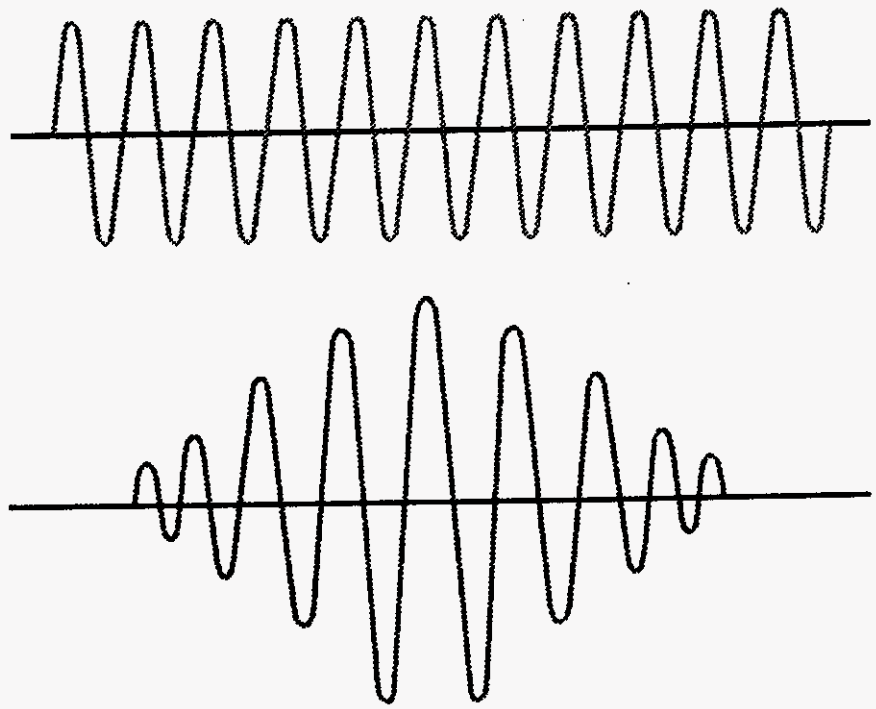
1. Acknowledge customers request & assure that you can help (*builds customer confidence & establishes rapport).*

2. Invite the customer to partner
   - Ask for permission to get more information
   - Use your knowledge, experience and BellSouth's leading edge technology to position yourself as a consultant.

3. Ask a transition question
   - Use an open question like: "Tell me about your business . . ." or "Describe your customers . . ."

Typical New Customer Product Buying Pattern

- Month 1:
  - 1FB
  - Touch-Tone
  - Call Waiting
- Month 3:
  - MemoryCall (they call us)
- Month 6:
  - Caller ID (they call us)



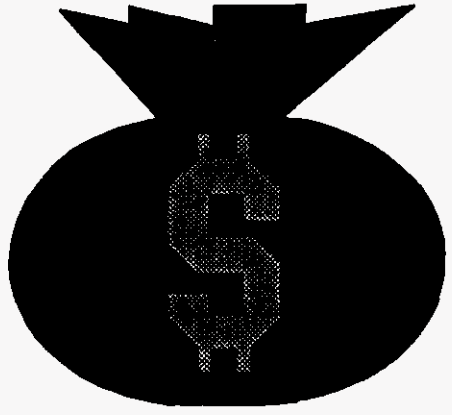
Consequence of Not Fulfilling Need on Day One

Month 1 generates $53.80 in product/service revenue with typical buying pattern.

Month 3 generates an extra: $7.95

Month 6 generates an extra : $7.50

Six Month Total Revenue: $362.10

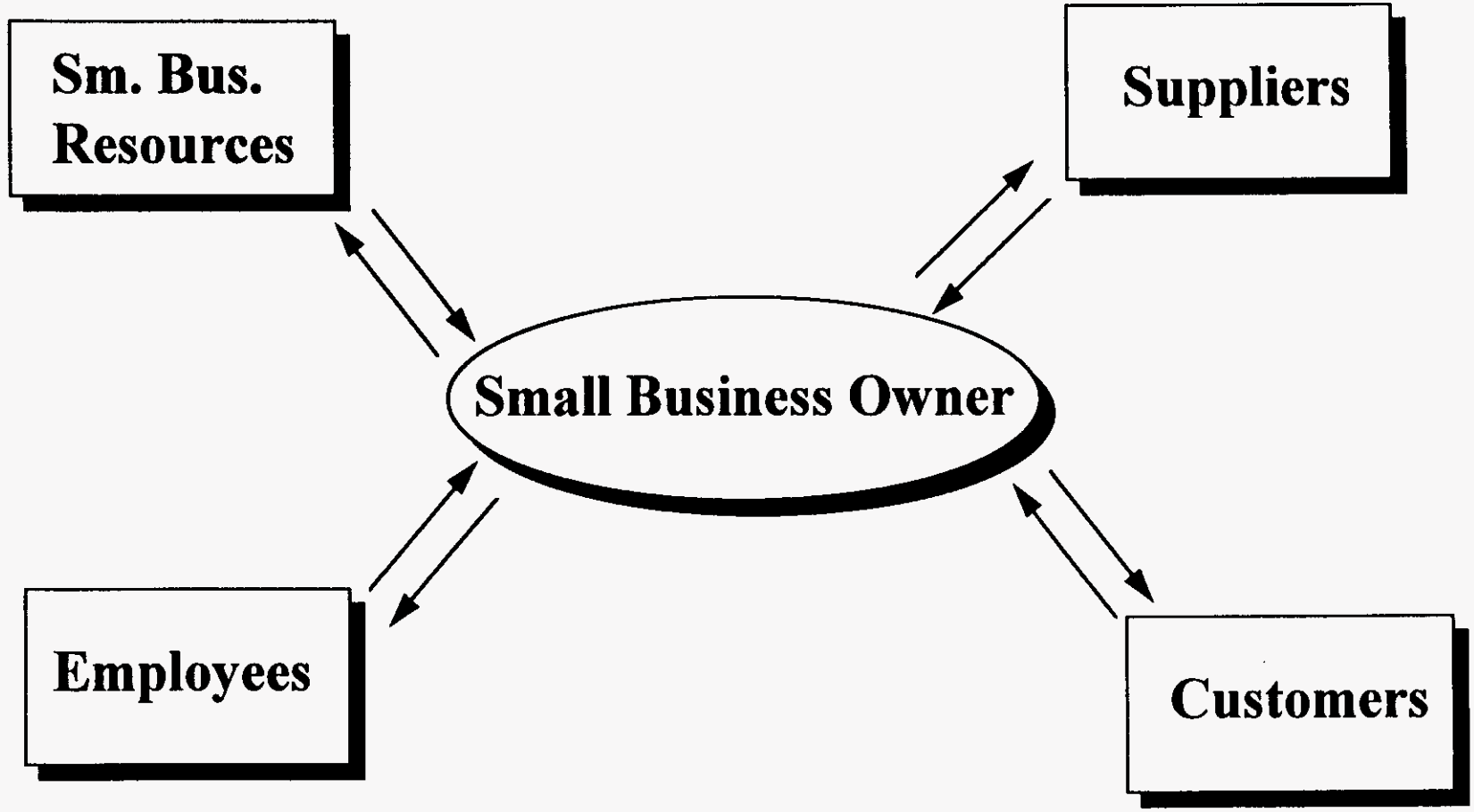


VERSUS

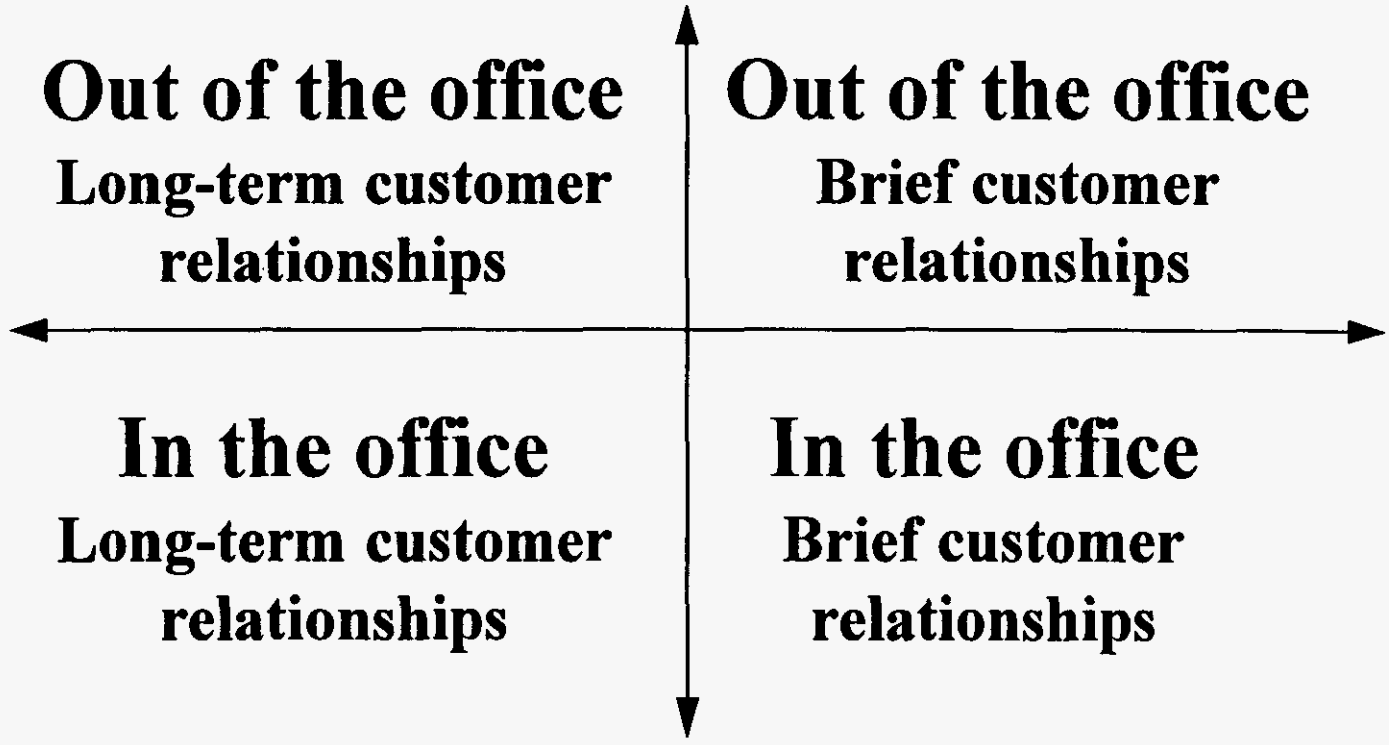
$415.50 if all needs had been uncovered on Day One.

That's $53.40 in Missed Revenue on Every "Typical" N Order (not to mention on more complex needs)!

The Customer's World of Communication Needs



Business Operating Environment



Possible Follow-Up Questions

Small Business Resources-based Questions

- How do you currently learn about new products or techniques in your field?
- Have you worked with the Small Bus. Administration for funding or expertise?
- Can your business engage in on-line banking?

Supplier-based Questions

- How do you currently communicate with your suppliers?
- Do your suppliers tend to call during your busy hours?
- Can you place orders with suppliers via a computer?

Employee-based Questions

- How many employees do you have?
- How do you currently communicate with your employees?
- Have you ever lost a sale because a message never reached an employee?

Customer-based Questions

- How many calls do you average per day from customers?
- Do you miss many customer calls because you're not available?
- Tell me a little about the image you'd like for your business . . .

You Can . . . Discover Customer Needs!
Handout 1: Exercise on Determine BOE

	Audio Example #1
Step 1: Take the Lead • Acknowledge the customer's request and assured that s/he could help. • Invited the customer to partner. • Asked a transition question.	
Step 2: Determine BOE • Where they do business • Relationship with customers (long/short)	
Ask these questions after audio example: • Did the specialist take a leadership role?	
• What could s/he have done to improve the call?	

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You Can . . . Discover Customer Needs!
Handout 1: Exercise on Determine BOE

	Audio Example #1
Step 1: Take the Lead • Acknowledge the customer's request and assured that s/he could help. • Invited the customer to partner. • Asked a transition question.	
Step 2: Determine BOE • Where they do business • Relationship with customers (long/short)	
Ask these questions after audio example: • Did the specialist take a leadership role?	
• What could s/he have done to improve the call?	

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You Can . . . Discover Customer Needs!
Handout 2: Simple vs. Complex Needs

	Audio Example #3	Audio Example #4
Step 1. Take the Lead • Acknowledged the customer's request and assured that they could help. • Invited the customer to partner • Asked a transition question		
Step 2. Determine BOE • Where they do business • Relationships with customers (long/short term)		
Ask these questions after each example: • Did the specialist take a leadership role?		
• What could s/he have done to improve the call?		

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Discover Customer Needs!!
Self Assessment Form

Customer's initial request:

What did you say to Take the Lead?

What questions did you ask to determine their BOE??

What questions did you ask to uncover the customer's business needs?

What effect did your questioning have on the customer?

How will you improve on what you said for the next call?

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Discover Customer Needs!!
Self Assessment Form

Customer's initial request:

What did you say to Take the Lead?

What questions did you ask to determine their BOE??

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Discover Customer Needs!!
Self Assessment Form

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What questions did you ask to determine their BOE??

What questions did you ask to uncover the customer's business needs?

What effect did your questioning have on the customer?

How will you improve on what you said for the next call?

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Lesson 4: Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Handout

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Introduction

Lesson Objectives

Upon completion of this lesson, you will be able to:

- Demonstrate ability to deal with conflict, overcome objections/excuses and close the sale.

Topics

Topic 1:	Dealing With Conflict
Topic 2:	Overcoming Objections/Excuses
Topic 3:	Closing The Sale
Topic 4:	Summary

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Topic 1, Dealing With Conflict

Viewing Conflict Differently

You're doing great!! You've successfully completed the first three lessons which covered five of the basic Consultative Sales processes. It's time to learn how to close the sale which is the sixth Consultative Sales process **and,** is the most exciting part.

We'll begin with dealing with conflict. There are going to be many situations in which conflict is encountered both internally and externally. Your attitude toward it, and handling of it, can make the difference with the customer and your peers. The following information will help you understand and deal with conflict.

It is **important** that when conflict is encountered:

- Do not become defensive
- Understand that it's not personal - it's business

Viewing Conflict Differently

Conflict Can Be Managed:

Conflict occurs when people's needs are not being met. Conflict is an inevitable part of life and is not always easy to deal with.

Many people avoid conflict for fear of things getting out of control.

However, it is possible to have more control over the outcomes of conflict. You can do this by considering the needs of everyone involved, and aiming for cooperation and mutual gain.

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Topic 1, Dealing With Conflict, Continued

Clues To Conflict

To resolve a conflict, you must first recognize that it exists. Like any good detective story the clues to conflict are there for you to discover. Conflict clues include: crisis, discomfort, specific incidents, misunderstanding, and tension.

Crisis:

A crisis is an obvious indication that you are in conflict and usually occurs when a situation is left unresolved too long. During a crisis people become overwhelmed by their feelings. Extreme actions are contemplated and sometimes carried out.

Discomfort:

Discomfort is a subtle clue. It is the intuitive feeling that something is wrong, even though you can't exactly identify what it is.

Specific Incidents:

Specific incidents are minor events that leave you feeling upset or irritated. Incidents usually mean that one party is annoyed and the other unaware that there is a problem.

Misunderstandings:

Misunderstandings occur when people make false assumptions about a situation, usually because of unclear communication. In a misunderstanding people have different views of a situation and see the problem in a distorted way.

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Topic 1, Dealing With Conflict, Continued

Clues To Conflict (continued)

Tension:

Tension distorts the way people see each other and often follows a misunderstanding or incident. When tension occurs communication becomes weighed down with negative attitudes and fixed opinions.

Look For The Clues:

Being aware of the early signs of conflict is a crucial skill. It can prevent people from damaging relationships by saying hurtful things that are not easily forgotten.

Take just a moment to think back to a time when you encountered conflict - it could be a business or personal situation. Did you have a clue that there was a conflict?

Choosing Your Approach

Approaches To Conflict:

Most people use the same approach to conflict no matter what the occasion. If your response to conflict is inappropriate, it can prevent you from handling the situation effectively.

But just like choosing the appropriate clothes to wear for different situations, you can choose an appropriate approach to conflict.

There are a number of approaches to conflict:

- **Withdrawal** - Withdrawal involves walking away from a difficult situation. It's wise to withdraw from a conflict if it is none of your business.

- **Suppression** - Suppression is refusing to acknowledge conflict. There may be times when it is preferable to do this. For example, if you believe someone is not yet ready to hear what you have to say.

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Topic 1, Dealing With Conflict, Continued

Choosing Your Approach (continued)

- **Win/Lose** - Win/lose is a power struggle where one party wins at the expense of the other. This approach is necessary when people need protection from violent or rash behavior.
- **Compromise** - Compromise uses negotiation skills and aims to divide things as fairly as possible. The danger of compromise is that you sometimes bypass more creative solutions that better meet needs.

Win/Win Approach To Conflict

However, there is one approach to conflict that is suitable for most occasions: the win/win approach.

Win/Win: The Best Approach -

- It takes the needs of all parties into account
- It's about cooperation and becoming partners in resolution rather than opponents
- It's concerned with finding solutions that are fair to everybody concerned
- It's about you and me rather than about you or me

- **Everyone Can Win** - It is commonly believed that if there's a winner there must be a loser. But in many cases everyone can win something.

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Topic 1, Dealing With Conflict, Continued

Win/Win Approach To Conflict (continued)

Steps To Win - When problems confront us we look for instant solutions - sometimes far too quickly. The win/win approach requires us to find out what's involved first before settling on a final solution.

The steps of the win/win approach are:

1. Find out what each party needs and why they need it
2. Look for creative solutions that meet as many needs as possible
3. Cooperate - work as partners rather than opponents - because when both people win, both are committed to the solution

Start With A Win/Win Attitude - Starting with a win/win approach increases your chances of creating a win/win outcome.

Response To Conflict

Creative Response To Conflict:

The creative response to conflict is a process of developing a win/win attitude. This response asks you to consciously direct the conflict to the positive, extract the best from each situation, and look for what can be gained from the situation.

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Topic 1, Dealing With Conflict, Continued

Response To Conflict (continued)

The RAFT Response:

The RAFT creative response to conflict has four steps:

1. **Respond** rather than react to a situation
2. **Accept** the situation for exactly what it is - no more and no less
3. **Find** something **positive** to learn from the situation
4. **Transform** your conflict into an opportunity

React:

If you react directly from your feelings you'll often make a difficult situation worse. To react is to behave impulsively and lose control. When we react we usually believe that someone else is the cause of our behavior. Reacting doesn't get us very far in the conflict resolution process.

Choose To Respond:

At first it seems that the easiest path is to react, but that usually leads nowhere. If you choose to respond, it may take a little longer to stop and prepare your thoughts, but in the end you are more likely to arrive at a win/win outcome.

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Topic 1, Dealing With Conflict, Continued

Response To Conflict (continued)

What Does 'To Respond' Mean?

To respond means to behave thoughtfully. When you respond you feel in command of a situation rather than swept away by it.

One way of responding is to move quickly into a win/win approach.

By responding you set the tone of conversation.

Accept The Situation:

To change a situation don't start by focusing on an ideal, start by accepting the situation for what it is, and then think of what you would like to change.

To Accept is the second step in the RAFT creative response to conflict.

Find The Learning Experience:

The creative response to conflict finds a way to see each conflict as a positive learning experience.

To find is the third step in the RAFT creative response.

Thomas Edison failed over 10,000 times before producing a working light bulb. When asked how he could persist he replied: ***"I did not fail 9,999 times. I succeeded 9,999 times in learning how not to make a light bulb."***

Learning involves choosing to see things as an interesting experiment. This makes it much easier to admit when you make a mistake.

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Topic 1, Dealing With Conflict, Continued

Response To Conflict (continued)

Winning And Learning:

Mistakes are an important part of the learning process. Life doesn't have to be about winning or losing - it can be about winning and learning.

The Reticular Activating System:

You can program your brain to change your behavior. The Reticular Activating System (RAS) is an area of the brain responsible for selecting what you notice and what you don't. If your attention is constantly drawn to mistakes and problems you end up programming your RAS to notice only the down side of things.

Have A Positive Attitude:

Our attitude and behavior influence the way other people see us. We can start to transform conflicts into opportunities by approaching them in a positive way. When we do this other people are usually more willing to deal with the conflict, which in turn makes the whole resolution process easier.

Envisage A Positive Outcome:

Instead of thinking about the likely outcome of a particular event, visualize what you would like it to be. Turn this visualization into affirmations. Positive affirmations are a useful tool for resolving conflict.

But remember, just as positive self-talk can affect the outcome of a conflict, so can negative affirmations. Negative affirmations pop up in chance remarks and statements of hopelessness and helplessness and distance us from a win/win approach.

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Topic 1, Dealing With Conflict, Continued

Communicating Effectively

Establishing rapport and building a relationship with the customer through active listening skills have already been covered at length with you in previous training lessons. So, in this lesson we will not re-cover those skills but we will be taking a look at appropriate assertiveness which is a part of effective communication.

Fight And Flight:

The two typical human reactions to conflict are fight and flight.

Fight - A fight reaction is an aggressive approach. People who use this approach attack first and ask questions later. A fight reaction is usually followed by hostility, anger, self-righteousness, guilt, and relationship breakdown.

Flight - In contrast, flight is a passive approach. In a flight reaction, people stifle their own rights and needs. The payoff of a flight reaction is that it avoids an unpleasant situation. But the consequences of flight include anxiety, disappointment, resentment, and anger because your needs are not being met.

Appropriate Assertiveness:

During conflict, appropriate assertiveness is about stating your case without arousing the defenses of the other person. This response is likely to generate a positive outcome.

Assertive statements let you make a clean, clear statement about the conflict without leveling shame or blame.

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Topic 1, Dealing With Conflict, Continued

Communicating Effectively (continued)

Assertive Statements:

1. Stating the issue objectively
2. Stating how you feel about it, without blaming the other person or being insulting
3. Stating what you'd like
4. Getting the other person's agreement

Mapping The Conflict

When we map a conflict we use the map to display all the information and feelings involved, and then use this clarification to discover our options and plan actions. A map helps clarify the legitimate needs of a hidden agenda. Most importantly, maps help to find win/win solutions.

Stages Of The Mapping Process:

There are three stages in the mapping process:

1. Label the problem - simply name what it is that's affected by the conflict
2. Identify the major parties involved
3. Identify the needs and concerns of each party involved

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Topic 1, Dealing With Conflict, Continued

Mapping The Conflict (continued)

You have to do some guess work in the third step but the process will broaden your perspective. You may start to see areas where you need more information before launching into solutions.

It's best to build a map on a large piece of paper using different colors for the issue, parties, needs and concerns.

The Benefits Of Mapping:

The process of mapping has many benefits -

- conversation is structured
- excesses of emotion are avoided
- work becomes cooperative
- everyone's view is clarified
- new directions are found

New Solutions:

Mapping the conflict gives you the opportunity to survey the situation. Developing new options for better solutions is the next logical step. Designing options is a creative process, and it is important to find as many options as possible.

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Topic 1, Dealing With Conflict, Continued

Mapping The Conflict (continued)

Option Design Stages:

There are three stages when designing options:

1. Create options
2. Choose options
3. Act on options

Tips On Brainstorming:

Brainstorming is a useful way of creating options for conflict resolution.

Remember:

- If a problem is complex it is a good idea to appoint one person to record all suggestions
- It's important to welcome all ideas no matter how crazy they might at first, seem
- It's important to allow a little humor and nonsense into the session to release tension and generate lateral thinking
- Write up suggestions with thick colored felts pens on a large sheet of paper or whiteboard so everyone can see the ideas going up
- Ideas generated in this session are not set in concrete - they are just options
- Try not to evaluate ideas as they arise - just let them come out
- It's a good idea to set a time limit for your brain storming session, for example, give minutes or half an hour - just let the ideas come out until the flow runs dry

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Topic 1, Dealing With Conflict, Continued

Mapping The Conflict (continued)

The Purpose Of Creating Options:

Creating options means looking for an answer that meets everybody's needs. It also means getting people to work cooperatively, in search of a solution.

Evaluation Questions:

Three important questions when evaluating a solution:

- Is it feasible?
- Is it enough?
- Is it fair?

The Action Plan:

When the solutions have been evaluated and decided on then an action plan must be devised to implement them.

An affective action plan must answer the following questions:

- What are the tasks that must be completed to make the solution happen?
- Who is responsible for each task?
- When will the task be started and when will it be completed?
- What kind of review will take place when the task is completed?

Now that you know how to effectively deal with conflict, let's continue with our next topic - Overcoming Objections/Excuses.

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Topic 2, Overcoming Objections/Excuses

How To Overcome Objections/ Excuses

How To Overcome Objections:

Your customer may raise objections/excuses during your presentation and/or immediately after you try to close the sale. It is best to address any objections/excuses when the customer raises it. Even if you haven't finished your recommendation, go ahead and address the objection/excuse so that your customer isn't thinking about it instead.

Don't be surprised if your customer has more than one objection/excuse. Just handle each objection/excuse one at a time. Be confident and remember that you are just helping the customer to understand how your recommendation will help them. It is your job, as their "business consultant," to show that your recommendation is the right solution!

BOARD:

There are six basic steps to overcoming objections. They are:

- Clarify the objection/excuse
- Mirror + paraphrase
- Re-paint the picture
- Answer the objection/excuse
- Confirm that the objection/excuse was handled
- Ask for acceptance of the value proposition

If you gained agreement during the needs assessment and value proposition stage, you can re-paint using the customer's exact response.

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Topic 2, Overcoming Objections/Excuses, Continued

Clarify The Objection Or Excuse

The first step of overcoming an objection/excuse is to be sure that you understand the objection/excuse. Many objections/excuses are simply the result of a misunderstanding. Many sales people "paint themselves into a corner" by responding to what they think is the customer's objection/excuse, only to end up raising issues that the customer hadn't even considered. Be sure you know what the objection/excuse is before you address it.

Some examples of clarifying remarks are:

- "With Call Forwarding, what benefits do you see? What seems to be easy for you to use?"
- "What benefits do you see in an additional line?"

Let the customer tell you about the cost being too much.

Don't ever assume that you know what the objection/excuse is. Clarify to be sure.

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Topic 2, Overcoming Objections/Excuses, Continued

Empathize With The Customer

It is important you empathize with your customer's objection/excuse. You can show that you are not just there to sell them something, but rather you are there to help them. Empathizing is part of building your credibility as someone who is interested in helping them achieve their goals. Empathizing also shows that you were listening and really care about their issues.

The key to empathizing when the customer has misinformation is to acknowledge the customer's opinion without agreeing with it!

Let's look at some examples:

- "How could you use Call Forwarding? Now, let me explain just how easy this service operates."
- "You make an interesting point. Let me share some additional information with you."

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Topic 2, Overcoming Objections/Excuses, Continued

Answer The Objection

There are several ways that you can answer an objection/excuse. The approach you will take will depend on the type of objection/excuse the customer raises.

If the customer raises an objection/excuse after you have made a close, one of the first things you want to do is get their agreement that if you overcome this objection/excuse, then they will accept your recommendation. The approach basically says if I can overcome their objection/excuse, they will most likely buy. You get the customer's agreement first, then you overcome the objection/excuse. You only use this technique in situations where you know, up-front, that you have a good chance of overcoming the objection/excuse.

Example:

Customer:

"An additional line costs too much. I'm on a limited budget and I can't afford that much money."

NOTE: The customer has not objected to the service. Whenever possible, allow the customer to tie in their own customer worth vs. the investment. If the customer does this, they have sold themselves.

Business Applications Specialist:

"I can understand that. How do you see an additional line bringing in new business and helping to pay for itself?"

or,

"I can understand that. However, if I can show you how this line can bring in new business and help pay for itself, would you be interested?"

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Topic 2, Overcoming Objections/Excuses, Continued

Confirm That The Objection /Excuse Was Handled

Be sure that you have removed all obstacles to your recommendation. You want your customer to be open to saying "yes." You may want to say something like:

"What other questions do you have about the service?"

Remember, just handle the questions one at a time. If you get another objection/excuse, just start again by clarifying it and following the rest of the steps.

Asking For Acceptance Of The Value Proposition

The whole reason that you are overcoming objections/excuses is so that you can answer the customer's questions and remove any barrier to them accepting your value proposition. Once you have removed those barriers, you need to ask them, again, to accept your recommendation.

Example:

- "Now that you see the benefits of the service, may I go ahead and place an order for you?"
- "I can arrange to have this service installed by next Wednesday, how does that sound?"

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Topic 2, Overcoming Objections/Excuses, Continued

Commonly Heard Objections/ Excuses

Let's take a look at some of the commonly heard objections/excuses and suggested ways to overcome them:

Let me think about it:

- What questions do you have?
- What are your thoughts?
- What can I clarify?
- What is it you're sure about?

I need to check with...

- What questions might he/she have?
- What part do you need to verify with him/her?
- What is it that you feel he/she would like?

I don't know:

- What haven't I answered?
- Tell me what appeals to you most?

Maybe later, not now:

- How will it benefit you to wait?
- What benefits do you see in getting the service now? later?

It costs too much, not in the budget:

- How could some of these services save you money?
- How much does one customer cost you?

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Topic 2, Overcoming Objections/Excuses, Continued

Commonly Heard Objections/ Excuses (continued)

Sounds Too Complicated:

- What part of the service seems easy to you?
- What benefits do you foresee?
- How would it help if I called you on the day we connect the service?

My equipment does everything:

- How would you feel if we could enhance your equipment?
- Tell me what your equipment does.

This completes overcoming objections/excuses and leads us into our last Consultative Sales process - "closing the sale."

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Topic 3, Closing The Sale

Introduction

This is the part of the call that is critical to your success as a Business Applications Specialist.

- Learn to identify and act on buying signals.
- Remember the golden rule of closing - close early and often! Use trial closes through your sales call to prepare for the final close.
- Summarize the advantages (value) your customer will receive with a yes decision.
- Use a powerful closing statement.
- ASK FOR THE ORDER! This is the most frequently skipped part of a sales call. Under no conditions should you hesitate to ask your customer to make a buying decision.
- After asking for the order...Silence! Let the customer speak next.

Now let's take a look at some additional information that will help you with the sales process.

Let's look at customer buying signals. These are subtle signals that the customer may give you to indicate that he/she's ready to go ahead with your recommendation.

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Topic 3, Closing The Sale, Continued

Recognizing Buying Signals

The following are buying signals that you should respond to by attempting a trial close.

- **Silence** - The customer's silence may be telling you that you have answered all his/her questions and he/she's ready to say "yes."
- **Installation/Due Date Questions** - Questions like "How long does it take to get installed" tell you that your customer may have made a decision to buy and is moving on to implementing that purchase.
- **Reference Of Ownership** - Comments like "I could really use that service with the job I'm starting next week." Your customer is telling you that your product will help him/her. Confirm his/her feeling by asking for the sale.
- **Yes, I'll take it.**
- **Small Details** - When your customer starts talking about small details concerning your service, he/she may be ready to say yes.

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Topic 3, Closing The Sale, Continued

Asking For And Closing The Sale

Effective Closing Statements:

Here are several phrases that you can use in attempting to bring a customer closer to a "yes" decision:

- Alternative Close: Giving the customer a choice.
- How does that sound to you?
- We can have that service installed for you in just 5 days, how does that sound?
- I can write the order for you now, when would you like the service installed?
- I can process your order now and we can have your service installed by the end of the week.
- What other questions do you have that I have not answered?
- **MOST IMPORTANT** - Don't let the customer hang up without asking for a buying decision.

We are now going to take a closer look at asking for and closing the sale.

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Topic 3, Closing The Sale, Continued

Asking For And Closing The Sale (continued)

Why Don't Some Sales People Like To Close?

Probably the single biggest reason that sales people don't like to close is that they fear rejection. Some sales people take the rejection personally. Other sales people don't like to close because they feel like they are being "pushy" when they ask a customer to buy.

You really haven't done your job of helping your customer meet his/her business goals and needs until you have convinced them to accept your recommendation. Let's look at some things you can do to improve the chance that your customer will say "yes" to your recommendation.

When a customer is ready to buy, the following reasons are why they're buying:

- New comers to area
- Emergency buyers
- Dissatisfied customers
- Infrequent buyers
- Comparative shoppers

What makes them choose?

- Reliability
- Authorized Sales
- Service
- Completeness of line
- Illustrations or logos
- Location

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Topic 3, Closing The Sale, Continued

Asking For And Closing The Sale (continued)

Components Of A Successful Close:

You make a close when you request that your customer accept your recommendation. A successful close occurs when the customer does accept your recommendation. Closing becomes easy when the following components are present:

Preparation:

- Preparation should include a knowledge of your customer's goals and needs. It also includes a knowledge of the services you recommend and how they will help your customer's business. You should also be prepared for possible objections/excuses and know how to overcome them.

Your Attitude:

- You must project an enthusiastic and professional mannerism. You enjoy helping your customers become more profitable.

Your Confidence:

- You must have confidence in yourself and express that through your tone of voice. You will be helping your customer improve his/her business. Don't apologize for the cost of your recommendation, as long as it meets your customer's needs.

The Customer's Confidence:

- Your customer will be ready to buy if he/she agrees that a change is needed and you present the best way to make that change.

The Customer's Authority To Commit:

- The person you are making your recommendation to must have the authority to make the decision to accept your recommendation.

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Topic 3, Closing The Sale, Continued

Integrity-Full Disclosure

IMPORTANT: The following policy (located on next page) was put in place to ensure that all BellSouth customers are aware of exactly what services are being put on their account and how much it costs.

Since we do not require a signed agreement to place an order it is of the utmost importance that customers understand exactly what they are buying, how much it will cost, and the optional nature of the service.

Strict compliance with this policy is required.

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Topic 3, Closing The Sale, *Continued*

Integrity-Full Disclosure (continued)

All customer contact personnel MUST:

- Clearly communicate to customers the optional nature of each optional service that is recommended or sold.
- Provide a clear description of each optional service that is recommended or sold.
- Provide the rate charged for each optional service recommended or sold.
- Make sure the customer understands that optional services are not required to obtain basic telephone service.
- Make sure the customer understands that optional services can be canceled at any time without a cancellation charge.
- (SERVICE PLANS ONLY) Advise the customer that there are exclusions which will be detailed on the first bill. Cover the exclusions if requested by the customer.

These procedures apply in addition to any requirements mandated in your state.

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Topic 4, Summary

Common Mistakes

Common Mistakes You Should Avoid!

- Not talking to the decision maker. All too often, a salesperson will talk to the first person that listens. Save yourself a lot of time and frustration! Talk to the right person.

- Selling products instead of value. Spell out to your customer how your service will add value to their business. Do not sell the features, sell the value.

- Not asking for the sale. It's hard to believe that this happens so frequently, but it does. Do not let a customer hang up without asking for a buying decision.

- Talking too much. Make a solid presentation, handle the objections/excuses, and ask for the sell. Once you ask for the sale, remain silent and let the customer have the next word. Also, don't talk past the sale. Once the customer has agreed to buy go right into your call wrap-up. Do not continue to sell the service! Also, don't talk past the sale.

- Announcing instead of selling. Don't do a product knowledge "data dump" on your customer. Instead, translate your service into value the customer will benefit from. Do not expect the customer to translate your service offering into value - that's your job!

- High pressure selling instead of Consultative Sales. This approach may have worked in the old days, but it is not a successful approach for today's customers. Using creative Consultative Sales processes/skills will ensure much better results over the long run.

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Topic 4, Summary

Conclusion

Your Learning Advisor will now provide you with instructions for completion of exercises that have been designed to incorporate all of the Consultative Sales processes that you have been taught throughout this course.

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FIVE BASIC STEPS TO OVERCOMING OBJECTIONS/EXCUSES JOB AID

- Clarify the objection/excuse
- Mirror + paraphrase
- Re-paint the picture
- Answer the objection/excuse
- Confirm that the objection/excuse was handled
- Ask for acceptance of the value proposition

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COMMONLY HEARD OBJECTIONS/EXCUSES JOB AID

Let me think about it: - What questions do you have? - What are your thoughts? - What can I clarify? - What is it you're sure about?	**I need to check with....** - What questions might he/she have? - What part do you need to verify with him/her? - What is it that you feel he/she would like?
I don't know: - What haven't I answered? - Tell me what appeals to you most?	**Maybe later, not now:** - How will it benefit you wait? - What benefits do you see in getting the service now? later?
It costs too much, not in the budget: - How could some of these services save you money? - How much does one lost customer cost you?	**Sounds too complicated:** - What part of the service seems easy to you? - What benefits do you foresee? - How would it help if I called you on the day we connect the service?
My equipment does everything: - How would you feel if we could enhance your equipment? - Tell me what your equipment does.	

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CLOSING THE SALE JOB AID

- **Learn to identify and act on buying signals**
- **Remember the golden rule of closing - close early and often!**
- **Use trial closes through your sales call to prepare for the final close.**
- **Summarize the advantages (value) your customer will receive with a yes decision.**
- **Use a powerful closing statement**
- **ASK FOR THE ORDER! This is the most frequently skipped part of a sales call. Under no conditions should you hesitate to ask your customer to make a buying decision.**
- **After asking for the order...Silence! Let the customer speak next.**

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RECOGNIZING BUYING SIGNALS JOB AID

- **Silence** - The customer's silence may be telling you that you have answered all his/her questions and he/she is ready to say "yes."

- **Installation/Due Date Questions** - Questions like "How long does it take to get installed" tells you that your customer may have made a decision to buy and is moving on to implementing that purchase

- **Reference Of Ownership** - Comments like "I could really use that service with the job I'm starting next week." Your customer is telling you that your product will help him/her. Confirm his/her feeling by asking for the sale

- **Yes, I'll take it**

- **Small Details** - When your customer starts talking about small details concerning your service, he/she may be ready to say yes.

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COMPONENTS OF A SUCCESSFUL CLOSE JOB AID

- **Preparation** should include a knowledge of your customer's goals and needs, and customer's customer, who and why will they choose the business. It also includes a knowledge of the services you recommend and how they will help your customer's business. You should also be prepared for possible objections/excuses and know how to overcome them.

- **Your Attitude:** You must project an enthusiastic and professional mannerism. You enjoy helping your customers become more profitable

- **Your Confidence:** You must have confidence in yourself and express that through your tone of voice. You will be helping your customer improve his/her business. Don't apologize for the cost of your recommendation, as long as it meets your customer's needs.

- **The Customer's Confidence:** Your customer will be ready to buy if he/she agrees that a change is needed and you present the best way to make that change.

- **The Customer's Authority To Commit:** The person you are making your recommendation to must have the authority to make the decision to accept your recommendation.

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Consultative Sales

Learning Advisor Guide
Issue 1 - June 1996

Performance Improvement Department

Lesson 1: Providing Service Through Consultative Sales

Learning Advisor Guide

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Table of Contents

Estimated Time:

Objectives

Upon completion of this lesson, students will be able to:

- Identify the BST Vision and Mission statements
- Define Consultative Sales
- Explain their role as the customer's knowledge link to our products and services/willingness to take the lead
- Identify the characteristics of competitive readiness.

Advance Preparation

- Ask the Managers what their expectations are regarding Consultative Sales.
- Review Learning Advisor Guide and Handout. Distribute a copy of Handout to each participant.
- Connect overhead projector and setup screen to ensure that they work properly and overheads can be seen by all participants.
- Setup two flip charts on flip chart stands.
- Review role-plays

Equipment Required

- Overhead projector
- Flip chart
- Power strip

Materials

Learning Advisor Guide
Handout
Overheads
Flip Chart pads
Easel markers
Masking tape

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Introduction

Welcome **Welcome students to Consultative Sales**

Display OH1

Optional Exercise
Ask the participants what their expectations are regarding Consultative Sales?
Board their responses.
Review the expectations throughout the class. Upon completion of the course verify that all expectations have been addressed.

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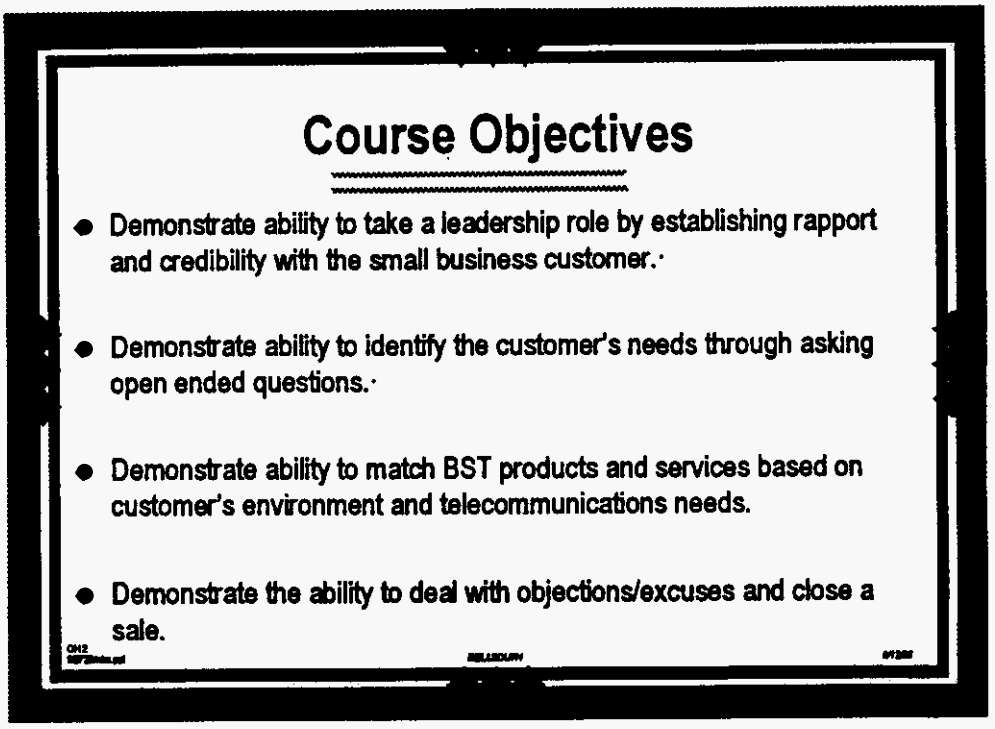
Introduction (con't)

Course Objectives Display OH2



Explain this course has been designed to teach you how to sell BST products/services that will not only meet our customers' needs but will exceed their expectations.

Upon completion of this course you will be able to:

- Demonstrate ability to take a leadership role by establishing rapport and credibility with the small business customer.
- Demonstrate ability to identify the customer's needs through asking open ended questions.
- Demonstrate ability to match BST products and services based on customer's environment and telecommunications needs.
- Demonstrate the ability to deal with objections/excuses and close a sale.

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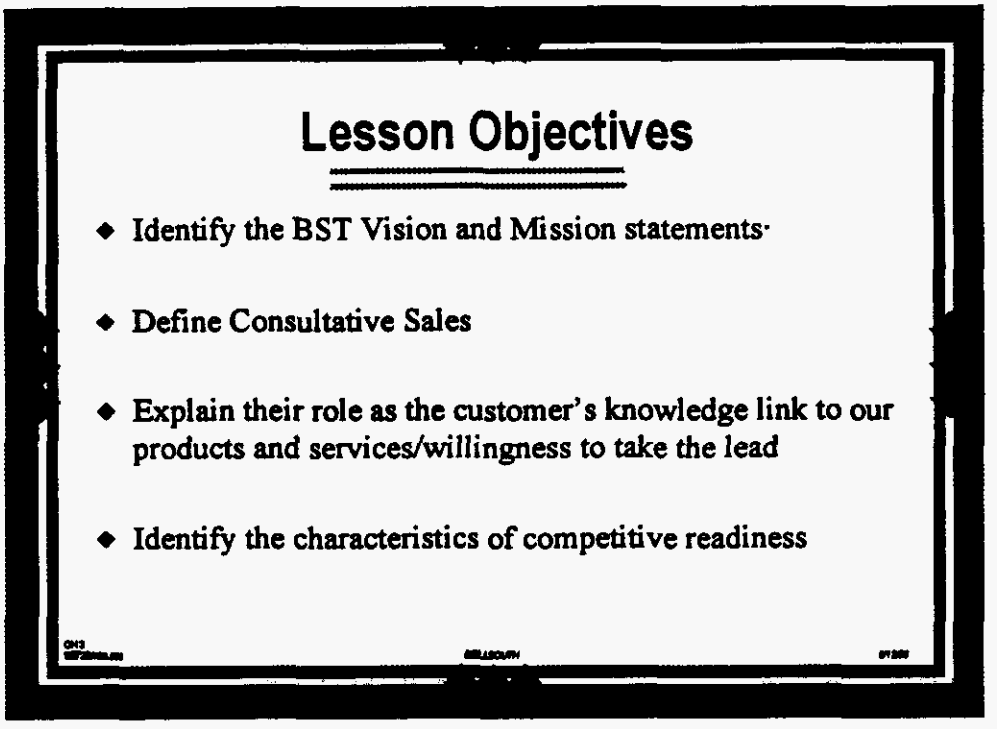
Introduction (con't)

Overview

The lessons that will be covered in this course are:

- Lesson 1 - Providing Service Through Consultative Sales
- Lesson 2 - You Can . . . Take The Lead
- Lesson 3 - You Can . . . Discover Customer Needs!
- Lesson 4 - Dealing with Conflict, Addressing Objections and Closing the Sales

Display OH3 Lesson Obj.



Explain that this is the first lesson called Providing Service Through Consultative Sales. Upon completion of this lesson, you will be able to:

- Identify the BST Vision and Mission statements
- Define Consultative Sales
- Explain their role as the customer's knowledge link to our products and services/willingness to take the lead
- Identify the characteristics of competitive readiness

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Introduction (con't)

BST Small Business Vision

Optional Exercise

Ask participants to write on a sheet of paper in ten words or less, the words they think describe the company's vision. Then ask participants for one of their words.

Board their responses.

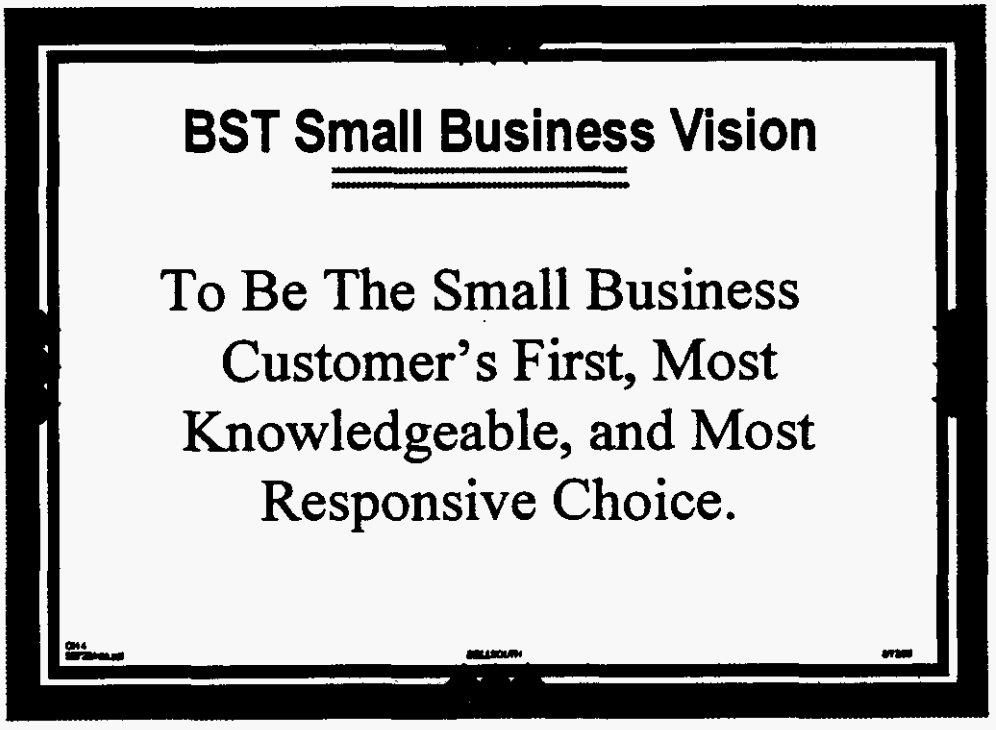
Ask participants to combine the words for a group vision statement.

Point out the similarities in their group vision statement and relate them back to the BST Small Business Vision statement.

BST Small Business Vision

Direct participants' attention to the overhead - BST Small Business Vision

Display OH4 Vision



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Introduction (con't)

BST Small Business Vision

Explain that you may remember having seen this statement earlier in your training.

Ask participants: What would it take for our Company to continue to be the first most knowledgeable and most responsive choice?

Expect:

- Innovative and flexible
- Provide excellent Customer Service
- Provide cost effective telecommunications solutions
- Friendly
- Easy to do business with
- Listen/understand our customer

Answer: We would all have to continually increase our understanding of the small business customer and their telecommunication needs.

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Introduction (con't)

BST Small Business Mission

Optional Exercise

Ask participants to write on a sheet of paper in ten words or less, the words they think describe the company's mission. Then ask participants for one of their words.

Board their responses.

Ask participants to combine the words for a group mission statement.

Point out the similarities in their group mission statement and relate them back to the BST Small Business Mission statement.

BST Small Business Mission

Direct participants' attention to the overhead - BST Small Business Mission

Display OH5 Mission

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Introduction (con't)

BST Small Business Mission

Explain that you may remember having seen this statement earlier in your training.

Ask participants: What do you think you will need to know in order to realize the Mission?

Expect:

- Customer needs
- Available products and service
- New technologies
- Understand how a small business operates

Answer: We would all have to continually increase our understanding of the small business customer and their telecommunication needs.

State that throughout your training on Consultative Sales, you will be taught how to actively participate in accomplishing both the BST Vision and Mission through application of your skills and knowledge of BST products and services.

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Consultative Sales

Exercise

This exercise can be used to stimulate participants' thought process toward skills, identifying needs, and teamwork.

Divide participants' into equal teams. Have each team plan a cruise. They are to identify:

- *their* destination
- items needed for the trip
- transportation
- etc.....

Tell the participants to be prepared to pass their plan to another team when instructed to do so. Allow 15 minutes to complete this part of the exercise.

Once completed, have each team pass their cruise plan to the left so that each team will have another teams' plan. Then have each of the team's circle three things that they would like to do from the plan that they have in their possession. Next, as a group, board the circle items from each team. Once boarded, the group then should narrow all of the boarded items down to a total of three items.

Learning Advisor Note: Conclude the exercise by boarding all of the skills identified (i.e., teamwork, flexibility, listening skills, group consensus, etc..) and tie back into how these skills can be intertwined with any customer contact.

Transition into "What Is Consultative Sales???

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Consultative Sales (con't)

What Is Consultative Sales?

EXPLAIN to the participants that there are three types of selling:

- Menu Sales
- Hard Core Sales
- Consultative Sales

Exercise: Have participants write on a piece of paper their definition of Consultative Sales.

BOARD their responses

EXPECT:

- Recommendation based on knowledge of products/services
- Matching products/services to meet customer needs
- Helping the customer to obtain success in their business

EXPLAIN:

- Menu selling is good for a one time sale. This type of selling can be done with automation.

- Hard core selling is shoving something down the customer's throat. This type of selling leaves hard feelings.

- Consultative selling is identifying the customer's needs and providing services that will enhance their business and increase their revenues. This type of selling ensures repeat business which is what our company is interested in doing.

SAY: Let's take a further look at the definition of Consultative Sales.

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Consultative Sales (con't)

What Is Consultative Sales (continued)

DIRECT participants' attention to the overhead.

Display OH6 What is Consultative Sales

EXPLAIN: Partnering with our customer means working with them to ensure that we identify, develop and sell telecommunications solutions that will meet their business needs and leave them feeling confident and secure with the services that our company has provided.

These skills will be taught to you in greater detail throughout this training course.

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Consultative Sales (con't)

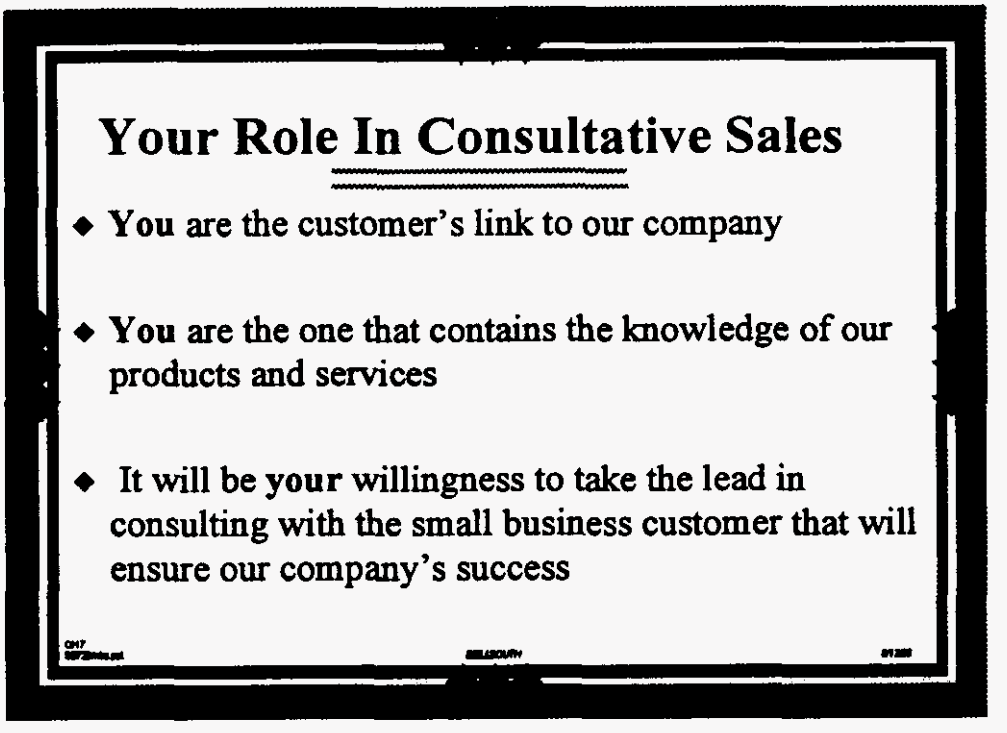
Your Role In Consultative Sales (continued)

Your Role In Consultative Sales

STATE: The customer and the company are depending on you because...

DIRECT participants' attention to overhead

Display OH7 Your role in Consultative Sales



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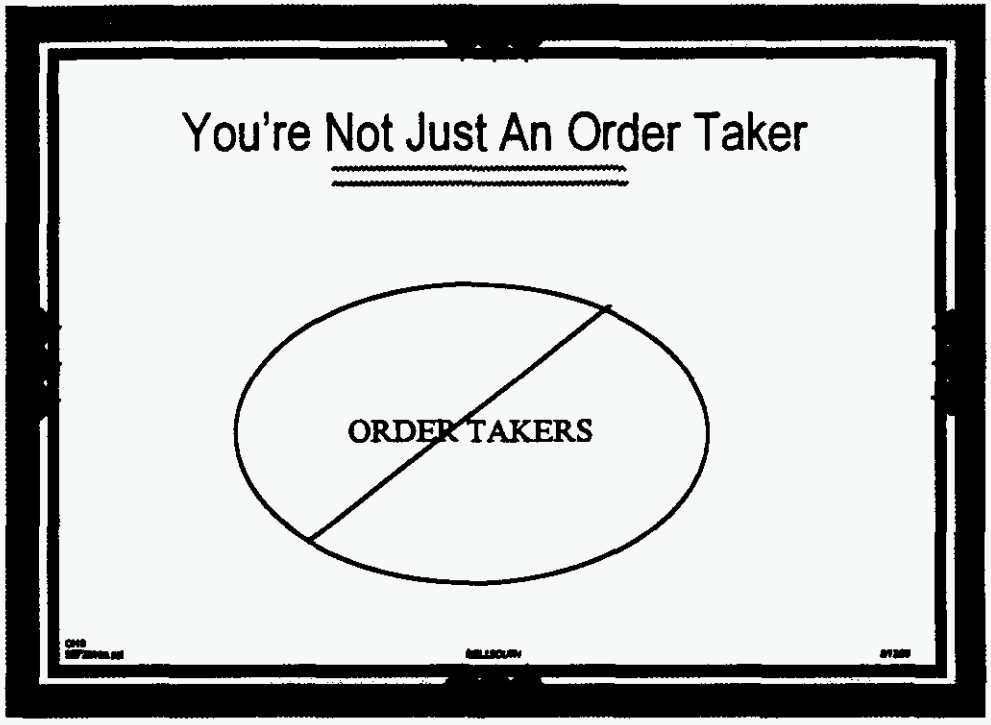
Consultative Sales (con't)

Your Role In Consultative Sales (continued)

DIRECT participants' attention to the overhead and emphasize that they are more than just "Order Takers"

STATE: You are not just an order taker, but a valuable consultant who can help your customers with their business needs. To our customers, you are BellSouth. For the small business customer especially, you may be their only contact with the company. Therefore, it is important that you be the best possible ambassador of BellSouth's mission to this marketplace.

Display OH8 You're Not An Order Taker.



EXERCISE: Get participants to relate to something they're familiar with, i.e., McDonald's asking if the customer would like an apple pie with their order as opposed to just taking an order.

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Consultative Sales Process

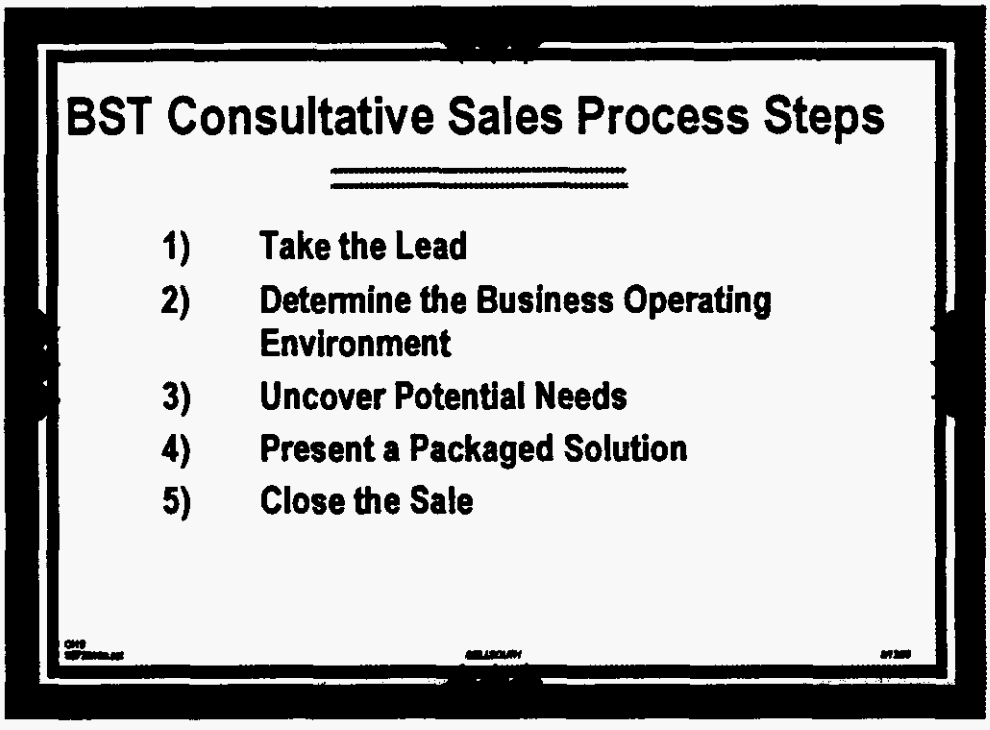
Consultative Sales Process Steps

EXERCISE: ASK participants "If you were brought in as a consultant to develop a new sales process, what steps would you include?

BOARD their responses

DIRECT participants' attention to overhead.

Display OH9 Consultative Sales Steps



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Consultative Sales Process (con't)

Consultative Sales Process Steps (continued)

EXPLAIN: There are six basic steps in the Consultative Sales process which include various sales skills (i.e., establishing rapport, identifying needs, etc.) which you will be taught throughout this training course. Those steps are... (read from Overhead 9).

EXPLAIN that these steps will be covered in detail later in this course.

SAY: You will be provided many opportunities to practice and demonstrate your sales abilities/skills learned from the selling process steps in upcoming lessons.

ROLE-PLAY: Have participants act as a sales representative for a local company that sells things such as, TVs, VCRs, Washing Machines, etc. (your choice of which). Have the participants ask you at least one or two questions that will help them obtain the information that they will need to make a sell.

The purpose of this role play to get the participants into the mode of asking open-ended questions.

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Competitive Readiness

What Is Competitive Readiness?

SAY: Our Company must go outside of the box when dealing with its customers. Providing better customer service to our customers ensures repeat business.

On an easel, **DRAW** a box and write the word "Good" at the top of the box.

SAY: Many companies are now offering "Call Screeners" which allow their customers the opportunity to handle their business transactions over the telephone in a minimal amount of time. Who needs you when they can handle their business, with satisfaction, without talking to a human being? This would qualify as good service in today's environment so we must surpass the "good" service of automation.

DRAW a box around your previous box and write the word "Excellent" at the top of that box.

SAY: Wal-Mart provided good customer service in the very beginning of their operations. However, they decided to exceed their competition by going outside of the box and offering their customers excellent service by hiring elderly people to hold the position of "personal greeter." The public loved it.

Next, Target and K-Mart decided that they would do the same thing in order to compete with Wal-Mart so, they hired personal greeters for their stores. Then, customers began going to the store that offered the cheaper price because they had equal service. If the service is equal the customer will take the lower price.

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Competitive Readiness (con't)

What Is Competitive Readiness? (continued)

DRAW another box around the previous box and write the word "superior" at the top of the box.

SAY: This prompted Wal-Mart once again to think outside of the box. They began giving superior service to their customers by providing personalized service to their customers. If a customer asks a Wal-Mart employee to help them with locating something within the store, that employee physically takes the customer to the item they need.

Wal-Mart was able to beat out their competition by thinking outside of the box. And----they did it without increasing their costs.

Our company does not want to be a discount company. However, we do want to increase our customer satisfaction which will ensure repeat business. So, all employees must always step outside of the box for each customer.

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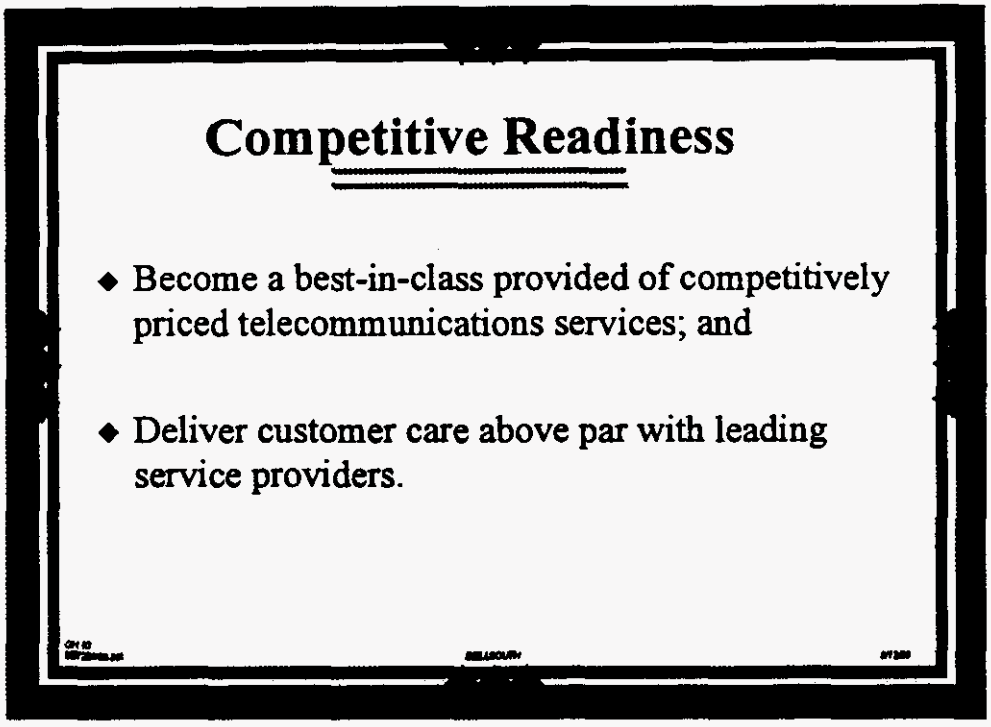
Competitive Readiness (con't)

What Is Competitive Readiness? (continued)

DIRECT participants' attention to overhead.

Display OH10 Competitive Readiness



SAY: You were introduced to competition in your lesson "In Our Competitive Environment," so, we will not spend a great deal of time discussing it in this class. However, let's take time to look at a couple of things.

ASK participants "How can we become a "Best-In-Class provider?"

BOARD their responses

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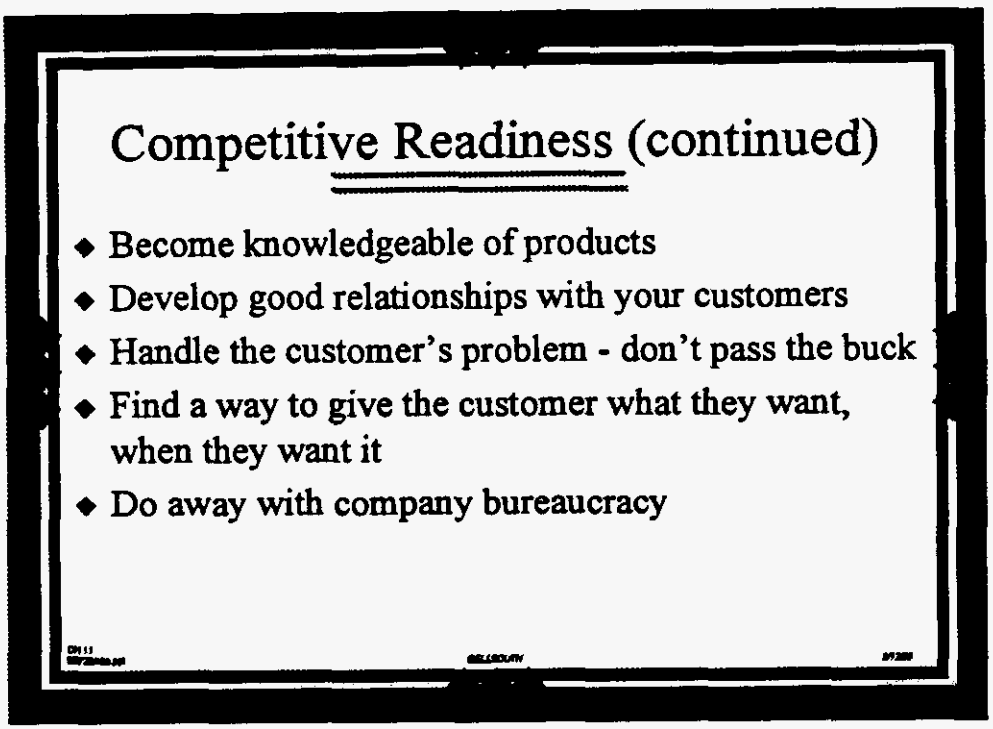
Competitive Readiness (con't)

What Is Competitive Readiness? (continued)

LEAD DISCUSSION TO Overhead

Display OH11 Competitive Readiness *(cont)*



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Competitive Readiness (con't)

What Is Competitive Readiness? (continued)

EXERCISE: ASK participants "What does delivering customer care have to do with being above par with leading service providers?"

EXPECT:

- best quality of product/service at the best price
- going the extra step

BOARD their responses

LEAD DISCUSSION TO:

- You'll lose your customers
- No customer care ---no customer
- The competitor will provide good customer service because they're eager and hungry for our customers
- "If it don't please the customer --- it don't count"

STATE: It is important that you remain constantly aware that our company must be competitively ready at all times. The way to do this is by:

- Being the best-in-class provider of competitively priced telecommunications services, and
- Delivering customer care that is above par with leading service providers
- Job + Product Knowledge

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Summary

Completion

ASK: What questions do you have about the material we've just covered?

ANSWER questions

> **LEARNING ADVISOR NOTE:** Spend some time discussing and clarifying the questions that participants seemed to struggle with. Encourage participants to ask questions regarding the course content now, before you move onto the next lesson.

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Lesson 2: You Can . . . Take The Lead

Learning Advisor Guide

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You Can . . . Take The Lead

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Your Journey To Success	9
The Traditional View	10
A Proactive Approach	11
Guiding Principles	12
Establishing Rapport	13
Taking The Leadership Role	17

Estimated Time:

Objectives

Upon completion of this lesson, students will be able to:

- Explain why it's important to help our small business customer succeed in today's business environment.
- Explain why all BellSouth Small Business Specialists must seek opportunities to be more problem solving and consultative.
- Demonstrate the ability to establish rapport and credibility with our small business customer.
- Position themselves and BellSouth as the telecommunications expert.
- Apply techniques for taking the lead in conversations with customers.

Advance Preparation

- Review Learning Advisor Guide, Handout and Video.
- Connect overhead projector and setup screen to ensure that they work properly and overheads can be seen by all participants.
- Setup two flip charts on flip chart stands.
- Pre-recorded audio cassette tape
- Cassette tape player for audio scripts
- TV & VCR
- Video-Customer Focus Group

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You Can . . . Take The Lead

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You Can . . . Take The Lead

Equipment Required

- Overhead projector
- TV/VCR
- Flip chart
- Power strip
- Cassette tape player

Materials

Learning Advisor Guide
Handout
Overheads
Pre-recorded audio cassette tape
Video-Customer Focus Group
Flip Chart pads
Easel markers
Masking tape

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Overview

Objectives
Display OH1

Explain that this is the second lesson called You Can ..... Take The Lead. Upon completion of this lesson, you will be able to:

Display OH2
Learning Obj.

- Explain why it's important to help our small business customer succeed in today's business environment.
- Explain why all BellSouth Small Business Specialists must seek opportunities to be more problem solving and consultative.
- Demonstrate the ability to establish rapport and credibility with our small business customer.
- Position themselves and BellSouth as the telecommunications expert.
- Apply techniques for taking the lead in conversations with customers.

(Note to coach: It is important to point out that objective #5 will be difficult to achieve if objectives #1, #2, #3 and #4 are not achieved.)

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Ideal Sales Experience

Exercise

5 min.

Use the easel and list the group's responses

Let's take a few minutes to describe together an ideal sales experience. Let's say you go into a computer store with more of an understanding of your needs than of how computer work. What would you expect from the salesperson in terms of how that person interacts with you?

Expect responses to include:

- salesperson should listen for my needs.
- ask questions to explore and clarify my needs.
- establish good rapport.
- be courteous and attentive to me.
- be knowledgeable about his products and services.
- give me accurate and reliable information.
- show interest in solving my problem.
- present an affordable solution.
- give me a recommendation I can understand and one that is appropriate.

Ask: Why is it important that this salesperson take the time to probe for my needs?

Expect responses to include:

- I need help and I expect him/her to help me.
- I want that person to recommend a solution tailored to my needs.
- The salesperson is the expert. He may know of issues and concerns I may not have considered.

Explain that our customers' needs are often more complex than the simpler needs of the past. Customers are often not up-to-date on new technology. Therefore, they do not fully understand new products and services nor do they understand what these new products and services can do for them and their businesses.

Before developing this training, BellSouth talked with customers to find out what is important to them, as we too, want to provide the ideal sales experience. Our customers are the ones who define what an idea sales experience is to them.

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Customer Focus Group

Customer Focus Group *Video*

Explain that we will be watching an edited video of actual customers who shared their candid comments with us during focus groups.

Show the Customer Focus Group video.

(**Learning Advisor Note:** Do not let the group focus on the negative feedback from the customers. Listen for positive feedback and focus on their wants and needs as they state them.)

Ask: What did you hear customers say they want, need and expect from us?

Board their responses.

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Our Customers Are Asking

Display OH3 Our Customers Are Asking...

Here's what they said:

Our customers are asking us to help them:

- Understand our product and service offerings.
- Make informed buying decisions in regard to their telecommunications needs.
- Reach their buying decision in an efficient and effective manner.
-

ASK: Why do you think these items are especially important to our customers?

Possible Answers:

- They need and want help.
- They want to make a good buying decision.
- They want us to respect their time.
- They want us to understand their needs.
- They want us to recommend what we know will work for them.
- They want value for their money.

Ask: Why is it so important that we listen to our customers?

Suggested answers:

- Our willingness and ability to solve our customers' business problems will help us work toward being best in class.
- Customers today expect us to help them make good business decisions if they are going to remain loyal to us.

Ask: How do these customer comments relate to your description of the ideal sales encounter?

- What we expect when we are a customer and what our customers expect of us are the same.
- They want more than friendly service; they want expert guidance in making decisions.

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Vision, Mission and Goal

Display OH
#4 Vision
#5 Mission
#6 Goal

Explain that in response to customer demands we have thought through our vision of what we want to be, clarified our Mission of purpose and identified the goal we want to achieve in Small Businesses Services.

In order for us to meet our customers' most important needs we must continue to understand our small business customers:

- who they are
- their needs/issues/concerns
- and what they need to be successful

Handout Reference Material

Provide participants with Reference materials

Ask: What to do you think about.....

- issues and trends in the workplace and economy?
- threats and opportunities for BellSouth?
- BellSouth's expectations for the small business specialist?

List these headings on an easel, one at the top of each page, leaving lots of room to record answers.

Advise the participants that you will give about 2 minutes and then ask them to share their thoughts with the group.

Continued on next page

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Vision, Mission and Goal (con't)

Display OH
#4 Vision
#5 Mission
#6 Goal

Board responses

Possible responses

Issues and trends

- customers are demanding the changes.
- customers are demanding more expert service and advice.
- everyone is concerned about getting more for their money.
- government regulating agencies are carefully looking at everything we do and how we do it.

Threats and opportunities

- customers have more choices (competition).
- customers are not as loyal as they once were.
- BellSouth is a leader in the field.
- more people are in the market for high tech communications products and services

Expectations for specialists

- to help customer succeed.
- to go beyond customer service and taking the order.

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Your Journey to Success

Display OH7 Your Journey to Success

Explain: Your journey toward being a successful specialist begins with understanding.

- The importance of helping your customers succeed.
- The value of using consultative skills in your interactions with customers.
- The need to continually improve your knowledge and skills.

This is a commitment that you must make to be successful as a specialist, now and in the future.

Most organizations today have initiated improved quality service standards. They train their people to serve customers in a friendly and courteous manner and do their best to keep the customer happy. Most of these initiatives are what we would call the Traditional View of customer service.

(Note to Learning Advisor: Be sure to recognize their successes within the Traditional View.)

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The Traditional View

Display OH8 The Traditional View

Explain: The Traditional View of serving customers is, in fact, the service goal for most customer service organizations in this country.

The model focuses on the customer and promises that the company will:

- Respond to the customer's point of view
  - quickly
  - with good clear information
  - with appropriate action
- Solve the customer's stated problems
  - listen to customers
  - present solutions to the customer's stated problem
- Ensure a pleasant interaction
  - courteous
  - friendly
- Meet commitments
  - make sure that they do what is promised

If more companies met these guidelines, the level of service in America would rise substantially. This traditional model is the goal of many Fortune 500 companies. Wouldn't it be great if everyone at least met these criteria?

At BellSouth Small Business Services we have always worked at meeting this standard and we have done a good job of serving our customers at this level.

(Note to Learning Advisor: Congratulate the teams on how well they do this level of service. You may want to mention the actual branch survey results.)

Our new challenge has called for increased commitments and promises which lead us to a proactive view of serving our customers. As we heard in the video our customer are asking for more. We heard them say, "I may not really know what I need. Help me make the right decision."

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A Proactive Approach

Display OH9 A Proactive Approach

Explain: We continue to deliver good, friendly, courteous service, but we cannot stop there.

We must also:

- Uncover hidden needs.
- Educate our customers.
- Offer appropriate solutions to meet needs.
- Move toward a partnering relationship with the customer (win-win)

If we only deal with the customer's stated need, we are an order taker. As long as we are only dealing with problems and requests brought to us by the customer, we are missing the opportunity to educate our customers on BellSouth products and services that will uncover business opportunities for them.
With our customers' increasingly complex needs and the increase in alternative suppliers, we must be seen as their first choice for a knowledgeable and helpful supplier.

We will help our customers succeed when we go beyond the stated need to uncover other needs. Then we mush show that BellSouth has products/services to meet those needs and propose a solution. This is the proactive approach.

Let's go back to our ideal sales encounter. Which approach were we describing? Answer: Proactive

Ask: Considering the proactive approach, what was in it for us when we were the customer? Benefits? Consequences?

(Note to Learning Advisor: It should be clear that the benefit of the Proactive approach is that we get the help and advice we need to make a good decision.)

Ask: If we expect a proactive approach, what do you think our customers expect?

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Guiding Principles

Display OH10 Guiding Principles

Explain that there are certain guiding principles that will enable you to help our customers succeed. They are:

- **Partner** with customers to explore needs. Examine facts, issues, and concerns about their business. (Asking, analyzing and responding will allow you to discuss the customer's concerns, to brainstorm and consider options and to collaborate on the best solution.)
- **Seek** to understand customers' needs and expectation. You must be able to see the picture that the customer has in his mind of what he needs, (either stated or potential) why, what's important to him and what he wants and needs to make him successful in making good business decisions.
- **Solve** customers' problems. Use your product knowledge, your experience in helping small business customers and your knowledge of the value of our products/services to recommend the right solution.
- **Lead** customers in making good business decision. Use your ability to understand the need and show the value of our products/services that meet that need.

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Establishing Rapport

Group listens to call #1
No rapport

Explain: Now let's listen to a customer call together. What we are about to hear is a re-enacted version of an actual customer call into a Small Business Telecommunications Center.

(Note to Learning Advisor: Make sure all can hear the tape the first time it is played. There will be seven taped examples played during this module.)

Ask & discuss: Did this customer experience the "ideal sales encounter" with BellSouth?

Answer: NO

Ask & discuss: What happened?

Answer: Our specialist did not even attempt to build rapport and, in fact was very accusing and argumentative.

Ask & discuss: How do you think the customer felt when she hung up the phone?

Answer: Angry

Ask & discuss: She hung up the phone without establishing business service - what do you think she will do now? What are her options? What will her options e next month?

Answer: She will look for options and will be an easy sale for any competition.

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Establishing Rapport (con't)

Group listens to call #1 (con't)

Ask & discuss: What should we have done differently?

Answer: Rapport building.

Ask: What is rapport?

Some answers might be:
⇒ a relationship of harmony, accord or affinity.
⇒ getting along with other people.
⇒ feeling good about other people.
⇒ being able to work well with others.
⇒ feeling comfortable with others.

Ask: How would a customer describe you if they feel they have a good rapport with you?

Some answers might be:
⇒ example responses from above.
⇒ they feel good about me.
⇒ courteous, friendly, trustworthy, polite, etc.

Ask: What is the likely outcome if you **don't** have rapport with a customer?

Suggested answer: Lose the customer

Ask: What is the likely outcome if you **do** establish rapport?

Suggested answer: Make a sale, create a loyal customer.

Ask: Why is it critical in today's market to form a partnership with the customer?

Suggested answer: Superior service creates the leading edge for most companies in today's environment of competition and product quality.

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Establishing Rapport (con't)

Group listens to sales call #2 Friendly order taker

Explain: Let's listen to another sales call that was made into one of our SBTC's...

(Note to Learning Advisor: This specialist is a friendly order taker. She is taking no leadership role in helping the customer even though she is being very pleasant.)

Ask & discuss: Did this specialist build rapport with her customer?

Answer: Yes, very well

Ask & discuss: Would you call this customer experience the ideal sales encounter?

Answer: No, she was very friendly but offered no leadership, expertise or helpful suggestions. (Traditional/responsive approach))

Ask & discuss: What should she have done differently?

Answer: She should have asked about the customer's needs and used her knowledge and experience to help the customer.

Ask & discuss: Why?

Answer: The service provided may not be the best for the customer's needs. There were probably other potential needs not uncovered.

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Establishing Rapport (con't)

Group listens to sales call #3

Explain: Let's revisit the first sales call we heard to see how that customer could have been handled differently.

Ask & discuss: How did the specialist do?

Answer: Much better than before. She is more friendly and helpful.

Ask & discuss: Did she build rapport with her customer:

Answer: Yes

Ask & discuss: The way this call was proceeding, do you think the customer would have had a good sales encounter?

Answer: Yes, the specialist is focusing on the customer's needs and asking questions to understand how BellSouth can offer the appropriate products/services.

Ask & discuss: What did this specialist do differently (from both sales calls #1 and #2)?

Answer: Established initial rapport (She seemed to "sincerely care")
Sustained good rapport throughout the call.

Ask & discuss: Did our specialist show leadership in this sales call or was she passive?

Answer: She showed leadership by asking questions and listening to the customer.

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Taking the Leadership Role

Taking the Lead

Explain: Our role in helping our customers succeed is one of leadership - not being passive.

Let's look now at how taking a leadership role can strengthen our relationship and enhance the rapport we have with the customer.

Taking the Lead means positioning yourself to be more consultative, to be a problem solver. It is being confident that we are a telecommunications expert for small business customers and using this confidence and competence to:

- Understand and uncover unique customer business needs, and
- Develop comprehensive solutions that address those needs and truly add value to our customer's business.

Value is what the customer derives from the decision to use our products and services. It may mean convenience, new customers, better service to their customers, increased office productivity, etc.

Ask: Is this what we heard our customers say in our customer focus group tape?
Why must we start "Taking the Lead?"

(Note: Stress again, this leadership will allow us to go head to head with our competition. Being passive will not. Remind them of the ideal sales encounter.)

Ask: When we simply ask our customers "what do you need" are we taking a leadership or a passive role?

Answer: A passive one.

Ask: When we simply "order-take" are we taking a leadership or a passive role?

Answer: A passive one.

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Taking the Leadership Role

Group listens to sales call #4 Takes the Lead

Explain: Now let's examine the steps of Taking the Lead. We will first listen to an audio example.

As you listen, make notes on the first thing the specialist says after introducing herself and the first question you hear the specialist ask.

Ask: What did you hear?
(ask for specifics about the conversation)

Ask the group:
Did she acknowledge and reassure the customer?

Answer: Yes

Ask: What did she say to reassure the customer?
(See script)

Ask: Did she ask permission to get more information?

Answer: Yes

Ask: How did she get permission to get more information?
(see script)

Answer

Ask: What did you hear?
(ask for specifics about the conversation)

Ask the group: Did she acknowledge and reassure the customer?

Answer: yes

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Taking the Leadership Role (con't)

Group listens to sales call #4 Takes the Lead

Ask: What did she say to reassure the customer?
(See script)

Ask: Did she ask permission to get more information?

Answer: Yes

Ask: How did she get pet permission to get more information?
(See script)

Ask: Did she ask a transition question?

Answer: Yes

Ask: What did she ask to begin to gather information?
(See script)

Ask: What did the specialist achieve by handling this call the way she did?

Answers:

- let customer know she heard them and she's willing to help.
- positioned herself to take the lead and find out as much as possible about the customer's needs.

Ask: What do you think the customer's opinion of the specialist is at this point?

Responses:

- cares about me.
- confident.
- very knowledgeable.
- willing to help.
- trustworthy.

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Taking the Leadership Role (con't)

Display OH11 Take the Lead

Explain: To build this type of relationship so quickly with a customer is a technique that we call Taking the Lead. Let's examine the steps for Taking the Lead.

The specialist in the example did three important things to Take the Lead. She was able to establish trust when she included these 3 components:

Step 1. Acknowledge the customer's request and assure that you can help.
- The customer feels the specialist is listening and is interested.
- The customer feels that the specialist sincerely wants to help and has the ability to help.

Step 2. Invite the customer to partner.
- Ask for permission to get more information.
- Use your knowledge, experience and BellSouth's leading edge technology to position yourself as an expert.

Step 3. Ask a transition question.
- A broad open question such as "Tell me about your business?"
- Helps you begin probing for needs.

Display OH12 Have the group *focus on Step 2* of Taking the Lead

Explain: Your ability and confidence in being able to successfully "Take the Lead" comes from:

- BellSouth's research and leading technology (we are the industry experts.)
- Experience with 1000s of small business customers.
- Proven results
- Understanding the potential benefits of BellSouth's products and services.

So, your personal power comes from your connection with BellSouth, your experience helping others, your knowledge of our products and services and what they can do for small business customers.

It's important to increase your comfort level in each area. The higher your comfort level, the more confident you will be in being able to take the lead and maintain it.

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Taking the Leadership Role (con't)

Display OH13
Have the group focus on Step 2 of Taking the Lead

Ask: What might make a specialist uncomfortable with taking the lead?

As: How confident do you feel now in taking the lead with customers?

(Note to Learning Advisor: Look/Listen for uncertainties or discomfort or obstacles they describe.)

(If a specialists says, "Most people I talk with really wouldn't want me to take the lead. They know what they want", it could be clue that this specialist doesn't understand the value of taking the lead and is comfortable at being a passive order-taker. We must remind the specialist of what our customers have told us that they want and need.)

Explain: The customer may not know how helpful you can be. It's your responsibility to let them know how you can help them.

Ask: Name an everyday situation where you have to rely on someone to take the lead when serving you. Who will share an example?

Examples would be:
- the doctor
- the pharmacist
- your auto mechanic
- an attorney

Ask: Can you imagine the situation where a doctor was passive and asked you what you wanted and followed your advice because it's what you asked for? He didn't bother to ask questions or offer his expertise.

Ask: What would be the outcome?

Responses:
- unhappy customer.
- law suit.

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Taking the Leadership Role (con't)

Display OH10 Guiding Principles

Explain: Using the three parts of Taking the Lead lets the customer know:

- that you are **partnering** with them to uncover needs.
- that you **seek** to understand.
- that you have the knowledge and experience to **solve** their problems.
- that you want to help by **leading** them in making good business decisions.

Group exercise
Audio tape examples #5, #6, & #7
Observation Form
Handout 2

Instructions

- Play example of telephone call from customer.
- Ask the group to take notes on their observation form.
- Pause the tape.
- Have participants give feedback on taking the lead using the 3 steps as criteria for feedback on the observation sheet.
- Ask for suggestions for improving, if any, and discuss with the entire group.

Play all 3 examples.
Responses and comments on Audio exercises:
#5 - Not a good example of Taking the Lead

- Step One of Taking the Lead was ignored.
- The specialists did not assure the customer that she could help with the stated request.
- Asking questions without assuring that she could help with the stated need could sound like a real "sales job" coming. Never ignore the customer's request.

#6 - Not a good example of Taking the Lead

- Specialist does not seem focused on customer's needs, but on procedures.
- She does not build rapport or Take the Lead.

#7 - A good job of all three steps of Taking the Lead

(Note to Learning Advisor: Encourage discussion of other ways that the specialists on the audio cassette could have handled these calls. Let them know that there is not just one way to successfully Take the Lead. The conversations should be natural and honest in a way that is comfortable for them.)

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Taking the Leadership Role (con't)

Practice Exercise Handout #3 (roles) groups of 3 people Handout #4 (observation form)

Explain: Now since we have listened to others Taking the Lead in various degrees, it is time for us to practice this skill. Use these situations on handout #3 to practice. Review instructions.

Give instructions

Role Play Instructions:

- Divide group into small groups of three.
- Select an observer in each group.
- Choose who will be specialist first.
- The third person is the customer.
- Customer reads request from Handout #3.
- Specialist practices Taking the Lead.
- Observer takes notes and gives feedback to the specialist (using the observation sheet-Handout #4.)
- After each role-play observer should ask:
  - What went well?
  - What would you do differently?
  - What makes this difficult?

After the first round continue around the circle. Everyone will play the role of customer, specialist, and observer.

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Taking the Leadership Role (con't)

Practice Exercise (con'[t)

Ask the group to share examples of the Taking the Lead statements they used. As you review each example, reinforce the 3 steps for Taking the Lead.

Ask: Think about your customers. In what situation will taking the lead be easy to do?

- when customer calls with a question about the possibility of a service, (new customer).
- when customer calls and complains that services aren't working out well.
- when they are asking for information in general.

Ask: When will it be difficult?

- when they are not open or receptive.
- when customer says immediately that they don't want anything except what they asked for.
- when customer says they really don't have time to talk.

Ask: At this point, what is the best thing to do?

Answer: Take the order.

Ask: Would you stop there?

Answer: No.

Explain: As you take the order, you still may have the possibility to explore opportunities with the customer.

Do not give up too easily. The customer may have important uncovered needs and may not realize that you can help them.

Everyone in the class probably has an example from their own experience where a customer who was non-receptive at first warmed up to them and opened up to ask for help.

Ask: Draw examples from the group or give one of your own that you have observed.

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Taking the Leadership Role (con't)

Wrap Up and Summary

Explain: The focus today was on positioning yourself as the expert and consultant for the customer. We learned a step by step process for building a trusting environment and asking to gather information.

The goad of this approach is to move from reactive to proactive and from order taker to problem solver.

You will discover that in practicing Taking the Lead you will gain value for both you and the customer.

Create Easel Chart:
Benefits to:
- Customer
- Specialist
- BellSouth

Ask: When we Take the Lead, who benefits?

Answers:
- Customers
- Specialists
- BellSouth

Ask & discuss: How do customers benefit?

Answers:
- Expert advise and help.
- Feel good about the experience
- Value for his/her investment.

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Taking the Leadership Role (con't)

Easel Chart: (con't)

Ask & discuss: How do specialists benefit?

Answers"

- Good feeling for really helping customers.
- Improved sales.
- More productive, less stressful.
- Increased leads.

Ask & discuss: How does BellSouth benefit?

- Well served, loyal customers.
- Increased sales.

Efficient and effective specialist team.

Display OH13

Explain: The five steps in a successful sales process.

During this program you will learn to help customers succeed using a model that was adapted for our specific needs at BellSouth Small Business Services. We will refer to this five step process throughout all the sessions.

The steps of the process will be covered in upcoming sessions. You will have the opportunity to learn and practice each step as we go.

Explain: This is a team practice. You and I will work together on our self-improvement efforts. Please note that I also have an assignment. I will be observing each of you Taking the Lead. I will be taking notes on what I heard you say on my observation sheet (Handout #6)

(Note to Learning Advisor: Show the class your Observation Form. Your class will recognize that this is the same observation form they used during their role play.)

Explain: Again, let them know that you will be working on Taking the Lead together. Stress the fact that you expect them to try applying these new skills at every opportunity. Let them know that you anticipate that there may be some awkward times and mistakes made. You are committed to helping them succeed.

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Lesson 3: You Can . . . Discover Customer Needs!

Learning Advisor's Guide

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Audio Scripts

[redacted]

you can . . .

TAKE THE LEAD

BELLSOUTH **Small Business Services**

Example 1:

Specialist: Hi, this is Nancy Lockhart with BellSouth, how may I help you?

Customer: Yes, my name is Betty Little and I'm calling to change my residence line to a business to get a free listing in the Yellow Pages. That number is 555-4567.

Specialist: Okay, have you had a business line before?

Customer: No, I'm starting a new business.

Specialist: Your new line will be $45 a month, and there is a $200 deposit.

Customer: What? I thought it was free to change to a business line. Besides, I've already paid a deposit on this line.

Specialist: No, you haven't.

Customer: Yes, I have.

Specialist: Well, it's not in the records.

Customer: Well, I did when I established service in my husband's name.

Specialist: We don't have any record of you paying a deposit.

Customer: Look, never mind! (Be mad!)

Example 2:

Specialist: This is Joanne Smith with BellSouth, can I help you?

Customer: Yes, my name is Sandra Kelly and I'm calling regarding account number 555-1234.

Specialist: I'd be glad to help you with that. Let me pull your files up. Sorry to keep you waiting. Okay, how can I help you?

Customer: Here's our predicament. We had another line, but disconnected it. Our business is expanding and the partners want to put it back in service, but they don't want it in our existing hunt group.

Specialist: That's no problem at all. I can take care of that for you. How long ago did you have this line disconnected?

Customer: About a week ago.

Specialist: Great. We should be able to give you the same number back. Didn't you say you want the line to stand alone?

Customer: Yes.

Specialist: Do you know which long distance carrier you want on this line?

Customer: AT&T.

Specialist: All right, I've got it all set up for you. Just so you know, your monthly bill will increase by $34 a month.

Customer: That's fine.

Specialist: We'll have this in by Friday the 14th, is that okay?

Customer: That will be good. Thank you so much for your help.

Specialist: Okay. (awkward pause) Can you think of anything that might (awkward pause) help you with your business?

Customer: Uh, no.

Specialist: Okay. Thank you for calling BellSouth.

Example 3:

Let's take another look at the first example and see how this customer could have been handled differently.

Specialist: Hello, this is Nancy Lockhart with BellSouth. How may I help you?

Customer: Yes, by name is Betty Little and I'm calling to change my residence line to a business to get a free listing in the Yellow Pages. That number is 555-2344.

Specialist: I'll be glad to help you with that. Are you starting a new business?

Customer: Yes, I am. I'm starting out on my own as a free-lance writer and business communication consultant.

Specialist: That's great! Congratulations. Ms. Little, we want to help you make your business a success with exactly the right telecommunications services. To do that, I need to ask you a few questions so that I can fully understand your needs. Will that be all right?

Customer: Okay, that would be great because I really don't know what I need.

Specialist: That's exactly what I'm here for. Tell me more about your consulting business.

Customer: Well, one of my biggest accounts is Xerox, and I need to be sure they get the red carpet treatment. But, they aren't my only client and if I'm on the phone with another customer and someone at Xerox is trying to reach me, I don't want them to get a busy signal.

Specialist: I can understand that. What hours will you be open for business?

Customer: Actually, I want to be available to my clients 24 hours a day. Since I'm just starting out, I need all the business I can get.

Specialist: What geographic area does your business cover?

Customer: Although many of my customers are in Atlanta, my Xerox clients are scattered around the country.

Example 3: (continued)

Specialist: Will you typically be in or out of the office?

Customer: I usually go to see my clients, so I'm out of the office a great deal during normal business hours. Since I do my best writing at night, I tend to be in the office in the evening. . . (fade out . . .)

Example 4:

Specialist: Hi, my name is Mary Morton and I will be your business specialist today. How may I help you?

Customer: Yes, this is Patrick Parks. I own a motorcycle repair shop and I'd like to get some information about adding a couple of your services. I'm interested in Call Waiting and Caller ID. My account number is 738-4365.

Specialist: Certainly, Mr. Parks. I'd be more than happy to help you with that. Let me check to see if those services are available in your area. . . Thank you for holding. Both of those services are indeed available to you.

Customer: Great!

Specialist: Mr. Parks, I know that your telephone service is very important to your motorcycle shop. I want to help you find the right services to meet your special needs. May I ask you a few questions to be sure that I understand your specific business requirements?

Customer: Certainly. . .

Specialist: Tell me a little bit more about your repair shop.

Example 5:

Specialist: Good morning, this is Jennifer Ramsey with BellSouth. How may I help you today?

Customer: Yes, this is Karen Kline and I'm calling to add a new line.

Specialist: I want to ask you a few questions to help me suggest the right products and services for your business? Is that okay?

Customer: Well, okay.

Example 6:

Specialist: Hi, this is Sally Reeves with BellSouth. How can I help you?

Customer: Yes, my name is Frances Feeling and I'm opening a new business.

Specialist: Are you calling to place an order or calling to simply check rates?

Customer: I'm calling to place an order. I'm opening a new Massage Therapy clinic in the next couple of weeks.

Specialist: What will be the address for your new business?

Customer: 50 South Young Street, Room 450

Specialist: Have you had a business telephone before?

Customer: No, I haven't.

Specialist: I need a personal reference and your social security number, please.

Customer: I guess my aunt that I'm staying with could be a reference. . . Her name is Margaret B. Feeling and her number is 868-4321. My social security number is 285-66-9783.

Specialist: Ms. Feeling, how many lines would you like for your new business?

Example 7:

Specialist: Hi, this is Ms. Lyons with BellSouth. How may I help you today?

Customer: This is Maria Ramona. I'm calling to open phone service for a new restaurant we're opening soon.

Specialist: Congratulations, Ms. Ramona! What type of restaurant are you opening?

Customer: We're opening an Italian restaurant on West Peachtree Street featuring Southern Italian cuisine. We're opening Mama Mia's around the first of October.

Specialist: Sounds great! Ms. Ramona. I can set up that new service for you, but first I would like to ask you a few questions about Mama Mia's to be sure I offer you the right services for your needs. Please tell me a little more about your new restaurant.

Customer: Sure . . .

You Can . . . Discover Customer Needs!

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Estimated Time:

Objectives

Upon completion of this lesson, students will be able to:

- Understand the value of the sales process
- Determine the Business Operating Environment
- Demonstrate a value statement
- Demonstrate a follow-up question

Advance Preparation

- Review Learning Advisor Guide and Handout
- Setup flip chart
- Pre-recorded audio cassette tape
- Cassette player for audio scripts
-

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Equipment Required

Overhead Projector
Flip Chart
Power Strip
Cassette tape player

Materials

Learning Advisor Guide
Handout
Overheads
Pre-recorded audio cassette tape
Flip Chart pads
Easel markers
Masking tape

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Overview

Welcome

Welcome the specialists to the third lesson of the Consultative Sales course.]

Display OH1 You Can . . . Discover Customer Needs

Explain that in this lesson we will be focusing on discovering customer needs, which will include asking questions to understand our customers' businesses and their business needs.

Display OH2 Steps in a Successful Sale

Focus the group on the 5 steps of successful selling that they will be learning. We will be learning and practicing these steps 2 & 3.

Display OH3 Taking the Lead

Explain: You'll recall that Taking the Lead consists of the following steps:

- Acknowledge the customer's request and assure that you can help
- Invite customer to partner
- Ask a transition question

This is the first step of the consultative sales process, and it sets the stage for everything to follow.

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Value of the Sales Process

Value of the Sales Process

Ask: Why are we asking you to learn the five step selling process????

Explain: It certainly isn't being done to make your life more difficult. To the contrary, by the end of this lesson the VALUE of this training and the new sales process will become crystal clear. It will actually make your life easier because of the following disturbing fat:

Today, on every call we receive, we really don't get a complete understanding of How Our Customers "DO" Business.

Yes, we're pretty successful at selling them individual products, like MemoryCall, but long-term that's not what our customers require from us.

Put another way, we're not here to "sell" the customer a BellSouth product or service - - - we're here to Solve A Problem. the Problem is that many of our customers' communications needs are not currently being met.

Let's back up this point with some cold, hard facts. Our research showed us that at our first contact with a customer - - during the N Order - - we often failed to uncover and recommend the complete package of products and services that would help a new business succeed. This is due to what some call "order taking".

Rather than getting a true picture of a customer's business, we often simply responded to a customer's request and placed an order for the products/services the customer's asked for - - things like a 1FB, Touch-Tone and Call Waiting.

Yes, it's true that each of these products can help a business succeed, but it's often not enough. For one thing, these are often the only products the *customer* is familiar with, so we wouldn't want to always base our recommendations solely on the customer's wishes.

Plus, it's quite possible that the business owner has never given much thought to his/her communications *needs* - - the way s/he must interact with all the people the owner relies on.

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Typical New Customer Product Buying Pattern

Display OH4 Typical New Customer Product Buying Pattern

Direct participants attention to the overhead.

Explain: We've found that this is the "typical" product buying pattern for a new customer.

State: Image that all you recommended for your customer was a 1FB, Touch-Tone and Call Waiting

Ask: At the end of month one, do you feel your customer would have had/his needs completely met? Would s/he have felt perfectly satisfied? Would s/he be able to maximize the day to day communications in this business with these three products?

Discuss: Think of the missed revenue if that customer might have benefited from MemoryCall and Caller ID on day one.!!

Display OH5 Consequence of Not Fulfilling the Typical Customer's Need on Day One.

Explain: You have the knowledge the small business owner needs to succeed, and this lesson will provide you with the tools you need. Since a shocking 75% of new small businesses fail, it is imperative that we provide our customers with the consultative relationship their communications needs demand.

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Needs Analysis Guide

Relationship of Communicatio nFramework to NAG

Explain & discuss: The current "Needs Analysis Guide (NAG) <show job aid> provides a framework for understanding how the customer's business manages its incoming calls, outgoing calls, and calls to employees ("across" calls).

Show NAG (See job aid at end of LAG)

The Needs Analysis Guide has served us extremely well, and today we will use a slight adaptation of the NAG to visually think about the customer's "WORLD"- - or the ways in which s/he communicates with the "incoming" customer calls, the "outgoing" calls to suppliers and small business resources, and calls that go "across" to employees.

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The Customer's World of Communications Needs

Display OH6 The Customer's World of Communication s Needs

Explain: Here's a very straightforward way to view the customer's communication needs. Look at this overhead. A customer's communications needs may include the ability to converse with customers by voice or by computer, or to communicate with other members of his/her business in any number of ways (e.g., cellular, pager).

Note to Learning Advisor: "Small Business Resources" might include the Small Business Administration or on-line resources that offer marketing intelligence, etc.

Explain: That's one of the most obvious ways true "Consultative" selling differs from only responding to a customer's request and "Taking the order". We want to understand HOW the Small Business owner needs to communicate with these people - - people like customers, suppliers, and employees - - and not jump to recommending a product (like MemoryCall) before we understand the customer's "world".

Stated another way,
It's all about the customer's ability to communicate - - not about our products. Once we understand their required level of communication, our products will automatically flow from this understanding (and selling these products will be much, much, easier).

As the overhead illustrates, BellSouth offers the small business customer a number of important ways to communicate with these groups through data lines, voice lines, wireless technology, and even Yellow Page advertising. It's all about the *ability to communicate*.

Check For Understanding

In short, what we provide for the small business owner is the ability to achieve an enhanced level of communication for that business to succeed and thrive.

Learning Advisor: Check for Understanding
Key concepts: Taking the Lead; New sales process; Typical new customer buying pattern; Basics of "communication framework"

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Levels of Consultation and the BOE

Simple V. Complex Needs

Explain: Naturally,, there are all types of customers needs that come into the SBTC - - some complex, some not so complex. Some customers may require a package of many BellSouth products and services to ensure effective communication with customers, employees, suppliers, and small business resources. Other customers, for example, may have no employees and have limited interaction with suppliers and small business resources.

Since we know little or nothing about a customer's world when a call initially comes in, we need a way to very quickly, very efficiently, understand the nature of the customer's communication needs.

In other words, we need a quick way to understand our customer's on every call.

Our research has shown us that we can understand the basic nature of our customers' needs by the answer to two basic issues: where the small business owner serves his/her customers, and whether the customer relationships are long-term or short-term. We'll revisit this issue in a minute.

As we've discussed already, levels of communications requirements may run from very simple to complex. To illustrate this point, let's consider an example we all know.

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Doctor's Office Models

Treatment of Simple V. Complex Needs

Ask: Have you ever thought about how a medical doctor is faced with treating simple and complex needs daily?

The doctor makes a decision on how much time and attention each patient needs at that time, as well as the types of tests that might be run on a patient's illness.

*It all comes down to the **patient's required level of service based on his/her NEEDS**.* A patient suffering from a sore throat or a skinned knee does not require the same level of attention from the doctor as a patient suffering from chest pains or a broken bone.

Doctor's Office V SBTC

Explain: Think of the small business customer's communications requirements as similar to a patient's illness in the doctor's office - - some will be complex, some not so complex. You will be able to fulfill some of these needs extremely quickly, while others may take a little longer.

- *It all comes down to the customer's/patient's needs.*

And this is where the "two questions" come into play. BellSouth marketing, through its research, has found that small business owners tend to place more emphasis - - or VALUE - - on certain types of communications needs ***depending on the type of business they're in.***

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Introduction to Business Operating Environment

Intro to 4 BOEs

For the sake of having a common understanding and using a common vocabulary, let's break up these businesses (and owners) into four ***business operating environments, or "BOEs".*** Breaking businesses into four types will help you understand how your customer's business operates, and will help you to understand the level of complexity of customer's needs.

Display OH7 Business Operating Environment

Explain: Look at this overhead. The basic framework for identifying the customer's business operating environment (BOE) is based on:

- whether the small business serves their customers at the customer's location (out of the office/go to them) or whether the customers are served at the small business location (in the office/come to them).
- whether the customer relationships are long-term or short-term.

Describing a customer in this way will paint a general picture of how they do business day to day. In other words, a customer's BOE will determine much of what is important for them to be successful.

Core Relationship = Customer

Ask: Think about the four "relationships" from the last overhead. They were customer/supplier/employee and resources. While all of them are important, which do you feel is the MOST important to the business owner??? Asked another way, toward which relationship (customer/supplier/employee/resources) are most of the day to day business activities geared??

Explain: The customer unit is usually the most important unit to the business owner (vs. supplier unit, etc.) to that's why the BOE centers around that relationship. Although the determination of BOE does not address three areas that were so important - - employees, suppliers, and small business resources- - it will give you a very quick and efficient way of gaining a general picture of how a customer "does business" day to day.

Check For Understanding

Learning Advisor: Check for Understanding
Key concepts: Level of consultation & the BOE (simple v. complex); 2 questions for BOE; Customer relationship v. others

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Quadrants of BOE

Display OH7 BOE

Refer participants to overhead/BOE quadrant

Explain: Now let's explore these quadrants and see what it is like to work in these environments.

Out/Brief BOE

Out of Office/Brief Customer Relationships

The first quadrant we will explore is a business operating environment where our customers spend most of their time out of the office or place of business. <Review to quadrant on overhead> They go to their customers to serve them and generally have many *brief* customer relationships.

Plumber Example

Consider a plumber, for example. This type of business owner falls into this quadrant because nearly all of his time is spent at the customer's location and once a certain job is done, it's unlikely that the plumber will work with the same customer any time in the immediate future (therefore, a "brief customer relationship").

Use of Phone

Ask: How important is the telephone system to this type of business owner? How does the phone system contribute to this businesses success?

Board responses

Possible responses:

- Almost all new business comes by telephone
- They need to get every all that comes in
- Customers want to know when they will be served (they don't want to hang around waiting)
- It's usually inconvenient, but necessary, to talk with the customers on the telephone
- The phone system must be able to handle high volume
- They must be able to send and receive messages easily
- Customers are likely to call competitors if response is not immediate

Point Out: All of your responses point to one important fact:

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Quadrants of BOE (con't)

Value Statement

Ask: From a telephony perspective, owners of businesses in this BOE tend to place the most emphasis - - or "VALUE - - of being able to do what . . .??

Learning Advisor: Evoke "not missing a call"; don't just state it.

Answer: **NOT MISSING A CALL!!!!!**

Discuss: Businesses in this BOE depend on each telephone call for business. If they miss a call, they have missed a customer and a sale. They cannot afford to miss a call as every call may mean business.

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Quadrants of BOE (con't)

Other Out/Brief Businesses

Ask: What other types of small businesses generally fall into the same operating environment (out of office/brief customer relationships)??

Board responses

Possible responses:

- Trade contractors
  - electricians
  - heating and air conditioning
  - roofing
- Service/repair companies
  - home appliance repair
  - industrial maintenance
- Delivery companies
  - couriers
  - movers
- Pizza and other food delivery

Good Job. That's a good list. Even though these businesses are different in certain ways, they are the same in that they have an "out of office/short term" customer relationship and the owners of these businesses tend to value NOT MISSING A CALL over everything else we can provide them.

As you'll learn during the rest of today's session, the VALUE STATEMENT (in this case, "Not Missing a Call") will act as the core of the entire questioning process.

Now let's look at the quadrant where the small business owner deals with her customers away from the office (like a plumber), but this time has fewer, long-term clients.

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Quadrants of BOE (con't)

Display OH7 BOE

Refer participants to overhead/BOE quadrant

Explain:

Out/Long BOE

Out of Office/Long Term Customer Relationships

Computer Consulting Example

For example, think about a customer who owns a small computer consulting firm which installs software systems for hospitals. Naturally, the owner of this business tends to establish much deeper, long-term relationships with his/her clients that a plumber (especially since computer software tends to get upgraded frequently).

Use of Phone

Ask: From a communications standpoint, what is critically important to her in order to be successful??

Possible answers:

- She must always be available and responsive to her active accounts
- She must be able to give and receive messages to others in her company
- She must focus on delivering a high degree of service to her top clients to retain their business

Point Out: Once again, all of your responses point to one important fact:

Value Statement

Ask: From a telephony perspective, owners of businesses in this BOE tend to place the most emphasis - - or VALUE - - on being able to do what . . . ??

Learning Advisor: Evoke "getting the right call"; don't just state it.

Answer: **GETTING THE RIGHT CALL!!!!!**

Discuss: Businesses in this BOE place a great deal of importance on a few very good customers. A great many calls may come into the owner's place of business, but it is important that the owner be able to receive the calls from his/her key customers.

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Quadrants of BOE (con't)

Other Out/Long Businesses

Ask: What other types of small businesses generally fall into the same operating environment (out of office/long-term customer relationship)??

Board responses

Possible responses:

- Building contractors
- Engineering firms
- Consultants
- Architects
- Interior designer

Good job. That's a good list. Even though these businesses are different in certain ways, they are the same in that they have an "out of office/long-term" customer relationship and the owners of these businesses tend to value GETTING THE RIGHT CALL over everything else we can provide them.

Once again, this VALUE STATEMENT ("Getting the Right Call") will act as the core of the entire questioning process for customers from this BOE.

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Value Statement in Action

Ford Explorer and Value Statement

Explain: Before we go on to the characteristics of the remaining two BOEs, let's take a closer look at the value statement in action....

Make believe you're in the automobile sales business. Let's say you sell Fords.

One day, a family (father, mother, young child) drives in. looking for a Ford Explorer utility vehicle. What do you think would be most valuable to them: the styling of the Explorer, the horsepower, or its safety??

Yes, it's true that all of these things are probably important to a certain degree, but the vehicle's safety is probably the most valuable since the family has a small baby.

Ask: Now think about a young professional who has seen the exciting Explorer ads on TV and is thinking about purchasing one. What do you think would be most valuable to him: the styling, the mechanical reliability, or its safety??

Likely response: Styling

Sure, safety or reliability is probably important to a certain degree, but styling is probably more important to that person at this time in his life.

Ask: So how would you use this "value" in the way you tried to sell the Explorer to the young professional? What's the relationship of this to the small business customer?

Possible response:

The value statement should act as a foundation to the entire conversation with the customer. Just as the automobile salesperson would be well served by gearing most of the conversation toward "styling" with the young professional and "safety" with the family, you will solve more customers communications requirements if you frame your conversation from the BOE and its VALUE.

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Value Statement in Action

Same Product May Satisfy Needs of Different BOEs	Basically, what this means is that the BOE/value statement may LEAD YOU TO RECOMMEND THE SAME PRODUCT IN A DIFFERENT MANNER BASED ON THE CUSTOMER'S CORE NEED/VALUE. In other words, THE SAME PRODUCT MAY SATISFY THE COMMUNICATIONS NEED OF DIFFERENT BOEs.
Check for Understanding	Learning Advisor: Check for Understanding Key concepts: Out of Office/brief BOE; Out of Office/long BOE; Value Statement

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Product/Value Activity

Value Activity Electrician and Consultant

Activity Setup: Let's practice selling a product based on the differing core values of two customers.

Let's say you're speaking with a trade contractor, like an electrician. Remember, this person works away from his office.

How To Recommend MemoryCall

Ask: Based on an electrician's BOE and its related value statement, how might you recommend MemoryCall??? Take a moment to jot down an answer and we'll discuss . . .

Board responses

Note to Learning Advisor: In this exercise, we're attempting to illustrate the point that the value statement may lead a specialist to recommend the same product in a different manner based on the customer's core need/value. In other words, the same product may satisfy the communications need of different BOE's. A fully developed dialogue (including taking the lead) is not required at this point. Instead, please emphasize the value statement and product relationship issue above all else in this exercise.

Possible Answer:: "Mr. X, based on the information you've given me so far, it seems that you spend the majority of your workday away from your office with many different customers. In terms of your phone system, I would imagine that it's important that you may not miss any of your incoming calls. Is that an accurate statement? One of our products, called MemoryCall, would ensure that you won't miss any of these important calls. . ."

Explain: Now let's jump to a different customer. Let's say you're speaking with a consultant who deals with a core group of 3-5 clients.

Ask: Based on a consultant's BOE and its related value statement, how might you recommend MemoryCall??? Take a moment to jot down an answer and we'll discuss . . .

Board responses

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Product/Value Activity

Value Activity (con't)

Possible Answer: "Ms. Y, based on the information you've given me so far, it seems that you spend the majority of your workday away from your office with a select group of long term customers. In terms of your phone system, I would imagine that it's important that you're always available to your clients whenever they need you. Is that an accurate statement? One of our products, called MemoryCall, would ensure that you get the right call from these extremely valuable clients . . . "

Debrief activity

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The Remaining BOEs

Display OH7 BOE

Refer participants to overhead/BOE quadrant

In/Brief BOE

Explain: Now, back to the remaining two BOEs. Let's look at the quadrant that includes small business owners who spend most of the time in their own place of business and deal with many customers on a short-term basis

Theater Example

Customers Come to Them/Short-Term Customer Relationships
For example, think about a customer who owns a local branch of a national movie theater chain. Since all of us have been to the movies at one time or another, analyzing this BOE - - particularly from a communications standpoint - - will be simple.

Naturally, the owner of this business tends to have a short-term relationship with his customers - - in fact, one might argue that the relationship rarely exceeds 120 minutes (or a 2 hour movie)! Yes, it's true that a customer may return to the same movie theater a week later, but it's not on a long-term "client" basis.

The business owner's orientation is toward fulfilling many different customer's expectations at the moment they enter the theater. Even through the volume of customers is great, each customer must leave the theater perfectly satisfied.

Note to Learning Advisor: In the next section, the specialists will be asked to determine how the customer interacts with customers from a telecommunications standpoint and face-to-face (face-to-face because this affects the phone products/services the customer will need so that s/he can interact face-to-face).

What does theater customer expect?

Ask: Make believe that you're a customer in this movie theater. To have a satisfactory experience at the box office and concession stand, what do you expect from the owner and employees??

Possible responses:

- I expect to be treated courteously, and that my purchase will be handled quickly.

I expect that the owner/employees will be available for face-to-face communication/taking my order.

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The Remaining BOEs (con't)

How Can the phone system contribute to success?

Ask: How could the theater's phone system help you have this satisfactory experience??

Possible response:

- Customers that are being helped don't like it when an owner/employee is interrupted by a phone call (while buying food or tickets). A product/service that allows more face-to-face communication between owner/employee and customer would be imperative (like a product that "takes messages").

Ask: Have you ever used a credit card at a theater (or been around someone who has)?? How could BellSouth make this a great experience for the customer??

Possible response:

- Theater must be able to process credit card orders fast and efficiently without delaying service to other customers. A product/service that allows for this would be imperative.

Ask: Have you ever called up a theater to find out a movie's starting time? Was communication with a "live" person necessary? Have you ever gotten a busy signal at a theater? What did you require?

Possible response:

Handling incoming calls with a live person is not always required; customers often call in to simply receive movie starting times. Theater requires product/service that allows for this as well as sufficient number of lines to minimize busy signals so that customers don't call a competitor theater instead.

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The Remaining BOEs (con't)

Phone System can enhance or ruin experience

Explain: A movie theater is a perfect example of how BellSouth products and services can enhance or ruin a customer's experience. Yes. . . the movie, sodas, or popcorn may all be excellent, but without having the ability to courteously and efficiently move the customer from "street to seat" it is a failed business/customer interaction.

It's with this point that we reach our next value statement.

Value Statement

Ask: Owners of businesses in this BOE tend to place the most emphasis - - or VALUE - - on the ability to ...?

Note to Learning Advisor: Evoke "speeding up transactions"; don't just state it.

Answer: SPEED UP TRANSACTIONS.

In other words, these businesses tend to value having speedy transactions over everything else we can provide them - - so, naturally, your questioning process with these types of customers should revolve around this. Without speedy transactions, the theater we spoke about would probably go out of business!!

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The Remaining BOEs (con't)

Other In/Brief Businesses

Ask: What other types of small businesses generally fall into the same operating environment (customers come to them/short-term customer relationships

Board responses

Possible responses:

- Most retail stores
  - department stores
  - grocery stores
  - drug stores
- Restaurants
  - sit down
  - fast food
- Dry cleaners
- Auto repair shops
- Quick copy print shops

Explain: Good job. That's a good list. Even though these businesses are different in certain ways, they are the same in that they have an "in office/short-term" customer relationship and will have many of the same telecommunications needs.

Note to Learning Advisor: Participants may become confused about some of these relationships due to the fact that customers often frequent the same drug stores, theaters, dry cleaners, etc., over a long period of time. For the purpose of the BOE, this is not a "long-term relationship." "Long-term" most often implies a CLIENT relationship - - those you would find at law firms, doctor's offices, or accounting firms. Exceptions to this "rule" might include exclusive retail shops or gourmet restaurants - - places where the owner doesn't rely on many different customers (high volume) because a small group of extremely valuable customers frequent the store over a long period of time (almost as if they were "clients").

If the participants come up with a type of business that could truly fall into either of 2 BOE's, that's OK. There will always be gray areas. The "BOE approach" is imply a framework to capture the nature of a business and how BellSouth products and services might fulfill a customer's required communications capability.

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The Remaining BOEs (con't)

Display OH7 BOE

Refer participants to overhead/BOE quadrant

In/Long BOE

Explain: Now, let's look at the quadrant that includes small business owners who spend most of the time in their place of business and deal with fewer customers on a more long-term basis.

Customers Come to Them/Long-Term Customer Relationships

These business owners usually have fewer customers with whom they seek to develop a long-term relationship.

For example, consider a small law firm which focuses on the needs of small and medium sized businesses. These attorneys may occasionally visit their better clients, but for the most part their clients come to them.

Use of Phone System

From a communication standpoint, what is life probably like at this law firm? In other words, what communications needs are required when dealing with their types of clients?

Board responses:

Possible responses:

- They need to be able to send and receive messages quickly
- They want to keep and develop their current clients through superior service and a high degree of responsiveness
- Clients do not like it when those serving them are interrupted by a phone call
- They need to be available and responsive when a client has a need or problem
- They need to be well organized internally to serve their clients well

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The Remaining BOEs (con't)

BOE = "Well Oiled Machine"

Explain: This type of customer's telecommunications system must allow the office to run like a well oiled machine.

It's with this point that we reach our next value statement.

Value Statement

Ask: Owners of businesses in this BOE tend to place the most emphasis - - or VALUE - - on the ability to . . .??

Note to Learning Advisor: Evoke the response "have an efficient office"; don't just state it.

Answer: HAVE AN EFFICIENT OFFICE

Explain: Because they tend to value this "efficiency" over everything else we can provide them, your questioning process with these types of customers should revolve around this value statement.

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The Remaining BOEs (con't)

Other In/Long Businesses

Ask: What other types of small businesses generally fall into the same operating environment (customers come to them/long-term customer relationships)??

Board responses

Possible responses:

- Doctors
- Dentists
- Travel agents
- Gourmet restaurants
- Exclusive retail shops

Explain: Good Job. That's a good list. Even though these businesses are different in certain ways, they are the same in that they have an "in office/long-term" customer relationship and will have many of the same telecommunications needs.

****GAME****

Explain: Now, let's have some fun with all this information!

Note to Learning Advisor: Conduct the game by referring to the "Game Directions" that is in the back of the Leader's Guide.
Exercise time: Approx. 15 minutes.

Post BOE/Value Poster on the Wall

Post the BOE/VALUE statement poster up on the wall now. Review its layout if necessary.

Explain: that this a another visual tool for quickly understanding the customer's business "world."

Check For Understanding

Learning Advisor: Check for Understanding
Key concepts: Product/value (MemoryCall); In Office/short BOE; In Office/long BOE

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Determine the BOE

Audios on determining the BOE

Explain: Now let's practice what we've learned.

Remember, determination of the BOE and the appropriate value statement comes by receiving information on two basic issues:

- whether the small business serves their customers at the customer's location or at their own location
- whether the customer relationships are long-term or short-term

Play audio #1 & #2
Handout #1

Explain: We will hear two audio examples of specialists asking questions to determine BOE. Ask participants to make notes on observation form as to the questions the specialists use. Discuss one example at a time.

Note to Learning Advisor: Participants should make notes on how well the specialist accomplished Steps 1 & 2 of the selling process. Ask participants to work in groups of two.

Ask: What is your opinions on how well the specialist did?

- What did the specialist on the audio do well? Did they stop short of discovering needed information? At what point?
- What could they have done to improve their conversations?
- On the "good call," what valuable information did we learn? Where could we have gone with follow-up questioning?

Not e to Learning Advisor:
<u>First audio example</u>: Specialist does good job with taking the lead but fails to find out the type of relationship they have with their customers. The specialist stopped short of determing BOE.
<u>Second audio example</u>: Specialist does good job on both Steps 1 & 2.

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Determine the BOE (con't)

Additional Practice on determining BOE

Note to Learning Advisor: Participants should remain in their groups of two for this exercise.
For the following two customer scenarios, have one participant from each group take on the role of the specialist; the other, customer. They should role-play the first two steps of the sales process (just like on the audio tape). After the "contact" is completed, have each "customer" critique the "specialist" based on the questions on Handout #1. Once the first debrief is completed, have each participant swap roles. Roam around the room as role-plays progress - - offering suggestions/encouragement's, etc. The contacts and debriefs should take no longer than 15 minutes total.

Customer Scenarios

Board the following customer scenarios

- N Order
  Customer Name: Mark/Martha Collins
  Business Name: Collins Dental Office
  Business Type: Dentistry
- N Order
  Customer Name: Steve/Stephanie West
  Business Name: :"Go West" Southwestern Eatery
  Business Type: Restaurant

Note to Learning Advisor: As you're listening to the role-plays, it doesn't make any difference if the "Go West" Eatery is treated as a "Have an Efficient Office" or a "Speed Up Transaction" restaurant (gourmet v. regular sit-down/fast food). All that's important is that the specialist and customer remain consistent depending on the information given by the customer.

Provide general debrief on excellent contacts you heard while roaming the room.

Ask specialists for general comments/concerns.

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Uncovering Needs

Uncovering Needs

Explain: Now let's take a step back.

You've now completed the first two phases of the sales process. First, you took the lead by asking the customer to partner with you.

Next, the BOE was determined by answers to two important issues:

- whether the small business serves their customers at the customer's location or at their own location, AND
- whether the customer relationships are long-term or short-term

As we've seen, determining BOE provides valuable insight as to what the customer values most.

Now comes one of the most important decisions you have to make on every call:

CHOOSING THE CORRECT MIX OF FOLLOW-UP QUESTIONS BASED ON THE CUSTOMER'S BOE AND COMMUNICATIONS NEEDS

Let's say you've taken the lead and have determined that a customer, such as a carpet cleaner:

- Works away from his office
- Has a short-term relationship with his customers

Which value statement for Carpet Cleaner?

Ask: When dealing with this customer, your questioning process should revolve around which value statement? In other words, what would this person VALUE most over anything else we could provide him/her??

Answer: NOT MISSING A CALL

Since you may not yet have enough information to recommend the best mix of products or services, you must follow-up with questions BASED ON this value statement and the customer's communications needs.

Think about this carpet cleaner. Let's name him Joe. Based on your initial determination of BOE, you know that he DOESN'T WANT TO MISS A CALL with his customers.

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Follow-Up Questions

Possible Follow-Up Questions?

Explain: The "Communications Needs" framework and BOE/VALUE statement poster on the wall may be a good way to think of relevant follow-up questions.

Note to Learning Advisor: This structured questioning process will be new to most participants. Remember to offer a great deal of encouragement and model the behavior. The "Communications Needs" chart and BOE/VALUE statement poster on the wall should provide a good deal of guidance on potential questions the specialist might ask.

Ask: Looking at these two visual aids, what might be some of your follow-up questions? Remember, what we're trying to do is fulfill the communication needs that Joe has based on his "world". Joe's needs might be quite simple - - or could be more complex - - which would lead to a deeper set of questions about this "world".

Remember, the Business Operating Environment concept deals with the relationship that is most important to the business owner: the customer (and not missing a call with them!). As a result, your questioning should begin with the customer relationship, and then branch out to other ones (employees/suppliers/resources) based on the size and complexity of the business (which you can usually gauge from the BOE/customer questions).

Board responses

Note to Learning Advisor: A way to frame follow-up questioning: "If time were short, what question would you ask if you could only ask one more question?" (customer-based) "If needs seem more complex?" (employee, supplier, resources-based)

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Follow-Up Questions (con't)

Customer/ Employee/ Supplier/ Resource-Based Questions

Display OH8 Possible Follow-Up Questions (when discussion begins)

Possible responses:

Customer-based Questions

- "How many phone calls would you say you average per day from customers?"
- "Do you find you're missing a lot of calls because you're not available to answer the phone?"
- "Do you seem to get a lot of business from the Yellow Pages?"
- "Do you ever communicate with employees, customers, suppliers, or small business resources with a computer?" "If so, are you missing any important calls while you're on the computer?"
- "Tell me a little about the image you'd like your business to have..."

Employee-based Questions

- "Joe, how many employees do you have?"
- "How do you currently communicate with your employees?"
- "Are you having any problems communicating with your employees?"
- "Have you ever lost a sale because an important message was never passed on to an employee?"

Supplier-based Questions

- "How do you currently communicate with your suppliers?"
- "Do your suppliers tend to call during your busy hours?"
- "Can you place orders, etc., with your supplier(s) with a computer?"

Resources-based Questions

- "How do you currently get information about new carpet cleaning techniques?" (e.g., communicates with colleagues/experts)
- "Have you worked with any small business resources like the Small Business Administration for funding or expertise?"
- "Can your business engage in on-line banking?"

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Follow-Up Questions (con't)

Financial *Consequences* Important

Note to Learning Advisor: If the responses failed to address the financial *consequences* of missed calls, etc., include the following section in your presentation.

Explain: In addition to these sorts of follow-up questions, it's often quite effective and powerful to point out the financial consequences of meeting or not meeting a communication need.

Ask: Can you thank of any questions that will force a connection between BellSouth products and services and the financial impact of buying or not buying?? Results are usually in terms of dollars and the effects on a business.

Possible Responses:

- "What is the average dollar amount of an order you receive by telephone?" OR
- "If you were to miss a call because of a busy signal or the fact that a customer couldn't get through to you, would there be a possibility that the customer might call a competitor instead?"
  OR
- "Did you lose any business in the past year due to telecommunications problems?"
  OR
- "Have you ever lost a customer because s/he got tired of waiting for you to return a call?"
  OR
- 'Based on our conversation, what improvement do you want to make in the way you/your employees communicate with customers?" (this closes the deal)

Customers will often recognize the value of knowing this information and the possible effect on their business. You may have to help them estimate the effects on their business - - and they will probably be quite impressed/surprised at these types of questions.

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Follow-Up Questions (con't)

Review important questions for Joe

Explain: Based on Joe's answers to your first few follow-up questions, you may determine that Joe's needs are very "simple" and that no further questioning is necessary (or Joe has no time to speak at this moment). With practice, your determination of the simple vs. complex issue will come very early in a call.

Review: Let's review the information we said we needed and the questions we asked Joe.

Ask: What information was most important for us to know?

Ask: What were the strongest questions we asked?

Note to Learning Advisor: Remind participants of the effectiveness/efficiency issue. Access is an issue so let's focus on the most important information and the strongest questions that will get us the information we need.

Optional Exercise

Depending on how much time you have left at this point, you may want to "Uncover Potential Needs" with additional customer(s). "Joe" was a carpet cleaner, if you have time, evoke potential customer-based, employee-based, supplier-based, and resources-based questions from the participants for one or more of these customers (remember financial consequences!!).

- **Melanie, a business consultant (Get Right Call).**
- **Doc, a pharmacist (Speed Up Transactions).**
  Julie, the owner of an exclusive retail shop (Efficient Office).

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Confirming Need

Confirming Need

Explain: This is an extremely important step: Confirming Customer Need

After we have gathered information using questioning, it is important to confirm the customer's needs before attempting to recommend a product/service.

Let's talk about what we mean by a "confirmed" customer need:

Confirmed Customer Need:
The customer has indicated a willingness to improve, change or create a condition that will be important for business success and you know BellSouth has the product/service to do it.

Ask: Why do you feel that confirming a need is important to customers?

Possible responses:

- it makes sure that we are clear as to the customers' point of view
- it reassures customers that we understand and are focusing on their needs
- it helps the customer focus on what is most important for them to succeed in their business

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Putting It All Together

Put It All Together

Explain: Now let's put it all together!!

Throughout this training class, we've talked about the fact that you will sometimes have to recommend a package of products and services based on a simple need and at other times a complex one. A "simple need" may include a customer who has very limited interaction with employees, suppliers, or small business resources, while a "complex need" would be just that - - more complex.

Let's listen to an example of a specialist using Steps 1, 2 & 3 of the sales process with two different types of customers - - one with a complex set of communication needs, the other with more simple. Please fill out this handout (Handout 2) as you listen to the tapes about a customer named "Tom McCloskey." Please be prepared to discuss these two segments of tape once they're completed.

Play Audio Example #3 & #4
Handout #2

Play audio #3 and #4
Complete Handout #2

Debrief

Debrief simple v. complex needs based on handout and consultative sales process . . .

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Role-Plays Based on BOE

Final Activity Outfit VIP's during break	Note to Learning Advisor: During a break, "outfit:" your "Traveling Customers" with their props (e.g., electrician paraphernalia). When the time comes, introduce these VIPs with great fanfare!!
Prepare teams	Explain: At this point, you will break up into team areas for a final activity. In this activity,. you will role-play "taking the lead," "determining BOE," and "determining need" with businesses from each of the four BOEs. These activities will be facilitated by 4 customer VIPs we've invited to join us today. Let's give them a hand!!
VIPs enter	VIPs enter
Students go to separate team areas	**Note to Learning Advisor: Please ask all class participants to break up into team areas at this point. Distribute Handout #3 to the Traveling VIPs to facilitate this final activity. Activity: 45 minutes**

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Role-Plays Based on BOE (con't)

Students rejoin

Note to Learning Advisor: At the completion of this activity, ask all participants to return to the main training area. The following section should be completed as a large group.

Ask: We've heard some outstanding customer contacts today.

When we've discovered the true nature of a customer's needs, how have the Customer, the Company and the individual Specialist benefited??

Customer Answers:

- Feel that we are trying to understand their needs
- Feel good about the relationship
- Feel that they will get a good and honest recommendation for a solution

Specialist Answers:

- Is efficient and effective in use of time and energy
- Feels more productive, less stressed
- Has the positive feelings that go with helping someone solve a problem
- Consultative relationship with customer will lead to increased individual revenue

BellSouth Answers:

- Is positioned as a partner to small business customers
- Is developing an effective team of specialists
- Will get good information about customers' needs for future products and services

Will be ready to out-service and sell the competition

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Review/Summary

Review/ Summary

Explain: Today in this lesson we have focused on asking questions to understand our customers. We have learned to use the market segmentation tool of BOE as a short-cut to understand our customers' businesses. We have also learned to conceptualize the customer's "world" along this BOE as well as his/her overall communications needs. These needs may include the ability to communicate with employees, suppliers, and small business resources in addition to the customer unit.

We have learned to ask questions to understand the impact to the customer's businesses (consequences) of making decisions to use or not use BellSouth's products and services.

As you work with customers to help them succeed in their businesses, you will have to make a judgment call about how much time you should spend with each of them.

That decision depends on their required communications needs and on their openness to doing business with you.

The new set of skills you've learned today will require a good deal of practice over the coming weeks.

Self-Assessment Guide

Provide participant with the Self Assessment Guide

Explain: Use this self-assessment guide with at least three customers. Note that the form includes Steps 1-3 in the sales process.

Explain: Let participants know that:

- We are working on this together.
- You expect them to try applying these new skills at every opportunity.
- There will be awkward times and mistakes.
- Everyone is committed to helping them succeed.

THANK YOU

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Game on Course Content

Preparation

Spread the 5 pieces of construction paper on the floor in a snakelike shape. Break the audience into 3 teams. Request 1 volunteer from each team to act as a "game piece" at the front of the room.

Questions are read to 1 of the 3 individual specialists who is given 30 seconds to confer with his/her team before answering. Correct answers allow specialist to "walk" 1 space on the game board. Incorrect answers force the specialist to move back 1 space. If a specialist/team has not made it onto the game board yet and still answers a question incorrectly, don't take away one of their turns (this should be fun!).

If you're not sure if a team's response is correct, ask the room to judge it. Be as humorous in your delivery as you want to be!!

The specialist/team who gets to the last piece of the "snake" wins. If you run out of questions and no one has won yet, make up some additional questions yourself, or simply proclaim the "leader" as the winner.

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Game on Course Content

Game Questions

1. Name the steps for taking the lead? *(Acknowledge customer's request & assure that you can help; invite customer to partner; ask transition question)*

2. Why are we "reinventing" the way we approach sales? *(Today, on every call, we don't get a complete picture of how our customers "do" business. We need a efficient and effective way of capturing our customer's communications needs and how our products/services may fill those needs)*

3. Name the "typical" 1st day through 6 month "N Order" buying pattern? *(Day 1: 1FB, Touch-Tone, Call Waiting. Month 3: MemoryCall. Month 6: Caller ID).*

4. Today, what percentage of new small businesses fail? *(75%)*

5. What's the relationship between the "communication needs" framework up on the wall and the Needs Analysis Guide (NAG)? *(The framework is only a slight adaptation to the NAG. It's a way to visually think about the customer's world - - or the ways in which the customer must manage the incoming customer call, the outgoing calls to suppliers and small business resources, and calls that go across to employees.)*

6. What are the two basic answers you need to get to determine BOE? *(Out/In Office; Long-term/Short-term relationship)*

7. The "communication needs" framework covers all the important relationships the small business owner must manage. Why does BOE deal with just one? *(The customer unit is usually the most important unit to the business owner, so that's why the BOE centers around that relationship. It gives us a very quick and efficient way of gaining a picture of how a customer "does business" day to day)*

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Game on Course Content (con't)

Game Questions

8. John Smith, a customer, spends most of his time out of his office and has many brief customer relationships. Based on this BOE, what VALUE statement would you use to establish the superiority of our products/services? *(Not Missing A Call)*

9. I didn't tell you what line of work John Smith was in. Give me an example of what he might do? (*Possible answers: trade contractor; service/repair tech; mover/courier; food delivery)*

10. Jane Brown, a customer, spends most of her time out of her office and has deep, long-term relationships with customers. Based on this BOE, what VALUE statement would you use to establish the superiority of our products/services? *(Getting the Right Call)*

11. I didn't tell you what line of work Jane Brown was in. Give me an example of what she might do? *(Possible answers: building contractor; engineer; consultant; architect; interior designer)*

12. Imagine that you sell lawn care products for a living. A customer comes in and explains that he's looking for a new lawnmower because his just broke down. He seems annoyed that this took place, since the mower was only 2 years old. You sell a different make and model than the mower that broke down. How could you use this information in a sales presentation dialogue (what does he find very "valuable")? *(Possible answer: " . . . the mechanical reliability of the mowers I sell is superior in the following ways . . . ")*

13. Imagine that you sell drugs/ medicinals to doctor's offices (pharmaceutical sales). During the course of a conversation with a doctor, he mentions that the health care industry is practically broken. He's so busy filling out forms, it seems, that he barely has time for his patients. How might you use this information in a sales presentation dialogue (what does he find very "valuable")? *(Possible answer: " . . . my company has taken the following steps to ease the ordering/recordkeeping process for our customers . . . ")*

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Game on Course Content (con't)

Game Questions

14. Imagine that you're a computer consultant and a potential client expresses her displeasure at some work another consultant just completed. Even though the quality of the other consultant's work was fine, it took the consultant too long to complete the project. How might you use this information in a sales presentation dialogue (what does the potential client find very "valuable")? *(Possible answer: ". . . based on what you've told me so far, I will be able to dedicate the appropriate number of resources to meet your deadline . . .")*

15. Can the same BellSouth product satisfy the communication need of different BOEs? Give an example of a product that might do this and in what way. I'll give your group a full minute to come up with an answer . . . *(Yes, Gauge appropriateness of product)*

16. Based on a travel agent's BOE and its related value statement, how might you recommend a 2nd data line? I'll give your group a full minute to come up with an answer . . . *(Possible answer: " . . . In an effort to run your business as efficiently as possible, a 2nd line would be beneficial in the following ways . . .)*

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NEEDS ANALYSIS GUIDE JOB AID

GENERAL	• **Tell me about your business:** ♦ Products/Services; ♦ Locations; ♦ Who Customers) • **How do you attract new business?** • **What geographic area does your business cover?** • **What distinguishes you from your competition** • **How many employees will be using the telephone?**	**OUTGOING**	• **Tell me about your outgoing calls:** ♦ Who ♦ What ♦ When ♦ Where • **What difficulties do you experience when making outgoing calls?** • **What type of communications equipment will you be using (phone equipment, PC, Fax, Pager, Cellular)? Problems when in use?**
INCOMING	• **Tell me about incoming calls:** • Who • What • When • Where • **How do you handle calls when not available?** (Busy condition, after hours, out of office, not available) • **What is the value of one missed sell/call?** • **What problems are you currently experiencing with incoming calls?**	**ACROSS**	• **How do you communicate within your office?** • **How do you transfer calls within your office?** • **How do you share information among different locations?** • **How many internal memos do you generate per month?** • **What difficulties are you currently experiencing with your internal communications?**

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You Can... Discover Customer Needs
Final Activity: Role Plays Based on BOEs (Handout #3)

VIPs: You have great leeway on how you can "play" these customers. Just remember to remain consistent & to keep the BOE's "value statement" in mind!!

Role #1: *Electrician* (possible name: Ed's / Ellen's Electrical) (Don't Miss A Call)

- You are a "one man show" and work mostly out of your truck
- You do have a small office from which you'd like to receive messages while on the road
- You're just starting out and trying to build a reputation, so responding to customers is important

Role #2: *Consultant* (possible name: Cathy's / Connor's Consulting Service) (Get the Right Call)

- You are an advertising consultant who does business at the client location.
- You work with a few very large companies to help them write commercials and print ads.
- You do have an office with 4 employees (graphic artists, technical writers, etc.), but you spend most of your time with clients and need to be accessible to other clients trying to reach you.

Role #3: *Fast-food Manager* (possible name: Ben's / Betty's Burgers) (Speed Up Transactions)

- You are a fast food manager at a Burger King franchise with about 15 employees.
- Most of your calls are from suppliers , the district office and employees, but your primary concern is serving the customers in your restaurant. You have just begin accepting credit cards and are concerned about being able to conduct business with all of the phone usage.

Role #4: *Travel Agent* (possible name: Ted's / Tina's Travel) (Have an Efficient Office)

- You are a travel agent specializing in cruises.
- There are 6 other travel agents in your company and you deal with several long-term clients that receive very special service from you.

You Can... Discover Customer Needs Follow-Up Team Meetings: Role Plays Based on BOEs

Team Manager: Over the coming week or two, conduct 4 separate team meetings to reinforce the consultative sales process. Ask your specialists to complete the first 3 steps of the sales process (Take Lead / Determine BOE / Discover Needs) with 1 business per team meeting. You may want to choose businesses in the following manner:

Randomly flip through a copy of the BellSouth Yellow Pages, and choose a business with an advertisement that will give a sufficient amount of data to construct a role play (e.g., address / phone # / type of business / any other interesting info).

Designate one team member as the business owner & one as the specialist. Have the rest of the group observe and take notes on the customer contact as it progresses. Assume it's a "C Order."

After each role play, discuss the strong points and weak points of the customer contact with the group & recommend ways in which the contact might have been improved. Make sure that the dialogue would have produced enough information for a product package recommendation.

You Can... Discover Customer Needs

Exercise on Determining BOE

Audio Example #1

Specialist:	This is Les Thomas with BellSouth. How can I help you today?
Customer:	Hi, this is Brenda Williams and I'm moving my business to a new location. Could you help me with moving my telephone service?
Specialist:	I'll be happy to help you with that, Ms. Williams. What is the current phone number for your business, and what will your new address be?
Customer:	(904) 788-3128. The new address will be 2112 Glenwood Drive, Daytona Beach, FL 32119.
Specialist:	Thank you. By the end of this call, I'll be able to tell you when your service will be up and running in your new location.
Specialist:	I've talked to a lot of customers who move their businesses to a new location. Would you mind telling me a little bit more about your business so that I'll be able to make sure you have the best phone system for your needs at your new location?
Customer:	Okay, but I'm pretty happy right now.
Specialist:	Ms. Williams, I see that your business is named "Brenda's Buds." Are you in the plant business?
Customer:	Yup. Business has been good so we're moving to a new location.

Specialist: Congratulations! I see that you currently have two business lines, touch-tone, MemoryCall, and Call Waiting. Are you happy with the way your phone system is currently working for you?

Customer: It's working just fine. I'd like to keep everything I currently have.

Specialist: Great. I'll move all of it over to your new address. Please hold one second and I'll get a date for you for the new phone service.

Customer: Okay, I'll hold....

You Can... Discover Customer Needs

Exercise on Determining BOE

Audio Example #2

Specialist: This is Les Thomas with BellSouth. How can I help you today?

Customer: Hi, this is Brenda Williams and I'm moving my business to a new location. Could you help me with moving my telephone service?

Specialist: I'll be happy to help you with that, Ms. Williams. What is the current phone number for your business, and what will your new address be?

Customer: (904) 788-3128. The new address will be 2112 Glenwood Drive, Daytona Beach, FL 32119.

Specialist: Thank you. By the end of this call, I'll be able to tell you when your service will be up and running in your new location.

Specialist: I've talked to a lot of customers who move their businesses to a new location. Would you mind telling me a little bit more about your business so that I'll be able to make sure you have the best phone system for your needs at your new location?

Customer: Okay. But I'm pretty happy right now.

Specialist: Ms. Williams, I see that your business is named "Brenda's Buds." Are you in the plant business?

Customer: Yup. Business has been good so we're moving to a new location.

Specialist: Congratulations! Do you run the type of plant business where people come to your property to pick up what they'd like to add to their backyards or gardens, or do you travel to the customer?

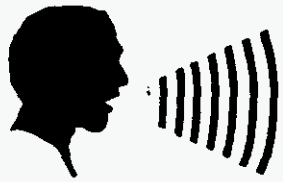
Customer: I have my own greenhouse & customers come to me. Occasionally I might deliver, but mostly I serve customers at the greenhouse.

Specialist: It sounds like a great business! I try to get my hands dirty in my yard when I can. I've been to a couple of greenhouses myself, and the ones where I go to seem to be crawling with people. Do you have many different customers, or do you service a few "high end" customers?

Customer: I have many different customers. I don't know many people in my line of business who could make it with just a few customers.

Specialist: Great. Thank you. I see that you currently have two business lines, touch-tone, Call Waiting, and MemoryCall. Can I ask you just a couple of more short questions to get an idea of how your business is expanding? I want to make sure that your phone service will allow you to have fast, efficient transactions with your customers while you're growing.

Customer: Okay....



You Can... Discover Customer Needs

Audio Example #3
(Simple Need)

Specialist: Good afternoon, this is Julie Parker with BellSouth. How may I help you?

Customer: Hi, my name's Tom McCloskey. I saw your add on TV for Caller ID, & I think I'd like to sign up for it.

Specialist: I'll be happy to help you with that, Mr. McCloskey. What's the phone number for your business??

Customer: It's 813-681-2814.

Specialist: Thank you. You're the owner of Tommy's High Tech Tunes on Industrial Blvd. in Tampa?

Customer: Yep, that's right.

Specialist: We've received a lot of calls in response to our Caller ID ads. Would you mind if I asked you a few questions about your business before I place the order? I'd like to make sure that I understand how you plan to use Caller ID in your business.

Customer: OK, I've got a minute.

Specialist: Are you in the radio business of some sort? Tommy's High Tech Tunes is a cute business name!

Customer: (Laughs) Well, it's not exactly the "radio" business. I sell & install car stereos.

Specialist: Oh, I understand. I've heard about some businesses that install car stereos at people's homes. Do you do that, or do people drive to Industrial Blvd. to have the installation done there?

Customer: Customers come to me. I have an air conditioned bay to drive the cars in to.

Specialist: Great. Do you have many different customers, or just a few who come to you often??

Customer: Well, the technology doesn't change *too* often, so I count on having a lot of different customers. That's the only way I stay in business.

Specialist: So I guess you receive calls while you're speaking to customers & installing stereos?

Customer: Yea. It sometimes gets really busy because I'm the only one here to answer the phones & do everything else.

Specialist: I see on your record that you also have MemoryCall which captures calls when you don't answer the phone. Are you interested in Caller ID so you'll know when to pick up & when to let it go to MemoryCall?

Customer: You got it. I'm getting calls all the time from people I know & sometimes it gets to be a pain. I don't want to miss a customer call, but sometimes I don't have time for my wife!! (laughs)

Specialist: I know what you mean... sometimes I'm glad my husband can't reach me here!! Would you mind if I asked you a couple of additional questions? I feel like I'm getting a pretty good idea of how you do business day-to-day.

Customer: OK.

Specialist: What kind of stereos do you install? Are they the really expensive kinds - - the kinds that my son keeps bugging me to buy him??

Customer: (Laughs) Yea, I install the good stuff that lasts a long time and sounds right. Mostly Blaupunkt, a German car stereo.

Specialist: How much do those stereos typically cost, if you don't mind my asking?

Customer: They range from $400 to over $1000.

Specialist: Wow. It sounds like each customer is worth quite a bit!

Customer: Yea, I definitely only get customers who really care about their music.

Specialist: How do you communicate with the suppliers of your products? Do you have to call Germany to order parts?

Customer: No. There's an authorized reseller in the U.S. who I call to order parts from. They're based in Chicago.

Specialist: Can you order parts from them by computer or just by phone?

Customer: All I do is call there & they express deliver everything.

Specialist: Fantastic. One last thing... how do you find out about new stereo products? Is it mostly from other people in the business, or can you find out in magazines and other places like the Internet?

Customer: All of the above, but I mostly find out from friends of mine. We all belong to an enthusiast's club that meets once a month. Mostly, we just try to impress each other out in the parking lot with our stereos, but we sometimes talk about new products!!

Specialist: Boy, we've covered a lot of ground! It sounds like your major concern is for you to be available to customers in your shop, while being able to identify when a customer is calling in, since every call could be worth from $400 to over $1000. Caller ID is one product that would help you do that and much more. There are other options available as well to help you maximize your ability to receive incoming calls, make outgoing calls and serve the customers in your shop. May I explain them to you?

You Can... Discover Customer Needs

Audio Example #4
(Complex Need)

Specialist: Good afternoon, this is Julie Parker with BellSouth. How may I help you?

Customer: Hi, my name's Tom McCloskey. I saw your special on TV for an additional business line, & I think I'd like to sign up for it.

Specialist: I'll be happy to help you with that, Mr. McCloskey. What's the phone number for your business??

Customer: It's 813-681-2814.

Specialist: Thank you. You're the owner of Tommy's High Tech Tunes on Industrial Blvd. in Tampa?

Customer: Yep, that's right.

Specialist: We've received a lot of calls on our "Additional Business Line" ads. Would you mind if I asked you a few questions about your business before I place the order? I'd like to make sure that I understand how you plan to use the additional line in your business.

Customer: OK, I've got a minute.

Specialist: Are you in the radio business of some sort? Tommy's High Tech Tunes is a cute business name!

Customer: (Laughs) Well, it's not exactly the "radio" business. We sell & install car stereos.

Specialist: Oh, I understand. I've heard about some businesses that install car stereos at people's homes. Do you do that, or do people drive to Industrial Blvd. to have the installation done there?

Customer: Customers come to us. We have an air conditioned bay to drive the cars in to.

Specialist: Great. Do you have many different customers, or just a few who come to you often??

Customer: Well, the technology doesn't change *too* often, so I count on having a lot of different customers. That's the only way I stay in business.

Specialist: Since I heard you say "we" a couple of times, it sounds like you have some employees. How many people work for you?

Customer: I have three installers, plus myself.

Specialist: So there's no one there who's job it is to answer the phones?

Customer: No, not yet at least.

Specialist: So you have to be able to receive every customer call - - even when you're installing stereos?

Customer: Yea. It sometimes gets really busy because we also have to handle customers in the shop.

Specialist: What is your main reason for wanting an additional line? Is your business picking up?

Customer: Business is pretty good, but mostly it's because of our fax machine. We've been using the same line for everything up to now.

Specialist: Do you take credit cards?

Customer: Yea, we take Visa & Mastercard.

Specialist: Are you running your phone, fax, & credit card processor off the same line?

Customer: It sounds crazy, but yea. I just added two of my employees in the past month, & it's getting hard to juggle everything.

Specialist: I see. Sounds like that could get pretty hairy during your busy times. What was your main reason for purchasing the fax machine?

Customer: Well, sometimes customers want quotes faxed to them, but mostly it's for ordering new stereo systems & supplies.

Specialist: Do your suppliers require that you fax in your orders to them?

Customer: Well, they don't require it, but it's really convenient versus calling in orders.

Specialist: I understand. Is it possible for you to place your orders with suppliers by computer?

Customer: It is with our main supplier, but we're not set up for that yet.

Specialist: OK. Would you mind if I asked you a couple of additional questions? I feel like I'm getting a pretty good idea of how you do business day-to-day.

Customer: OK.

Specialist: Do your employees travel on the road at all, or do they stay at Industrial Blvd all day?

Customer: Well, about once or twice a day we deliver systems to local car dealerships - - places like Jaguar & Porsche. But most of the time the installers are in the shop.

Specialist: But there's a chance that you might have to get through to an installer when they're on the road?

Customer: Yea, occasionally. Tampa is pretty stretched out, so they might be gone awhile.

Specialist: Just out of curiosity, what kind of stereos do you install? Are they the really expensive kinds - - the kinds that my son keeps bugging me to buy him??

Customer: (Laughs) Yea, we install the good stuff that lasts a long time and sounds right. Mostly Blaupunkt, a German car stereo.

Specialist: How much do those stereos typically cost, if you don't mind my asking?

Customer: They range from $400 to over $1000.

Specialist: Wow. It sounds like each customer is worth quite a bit!

Customer: Yea, we definitely only get customers who really care about their music.

Specialist: Fantastic. One last thing... how do you find out about new stereo products? Is it mostly from other people in the business, or can you find out in magazines and other places like the Internet?

Customer: All of the above, but I mostly find out from friends of mine here in Tampa. We all belong to an enthusiast's club that meets once a month. Mostly, we just try to impress each other out in the parking lot with our stereos, but we sometimes talk about new products!

Specialist: Boy, we've covered a lot of ground in a little time. Thanks again. It sounds like your major concern is for you to speed up your transactions, since you have to juggle phone calls, fax orders, & credit card orders. Plus, there's the issue of being able to communicate with your employees when they're on the road. An Additional Line is one product that would help you to speed up your transactions, but there are others options available as well. May I explain them to you?

you can. . .

Present Your Solution!

Business Application Specialist Continuation Training

[FINAL DRAFT COPY - APRIL 26, 1996]

- Mod 2 linkage
- Dale Carnegie
- Audio Scripts (Handout LH-4 Skills listed)

BELL*SOUTH* Small Business Services

FINAL DRAFT [redacted]

You Can...Present Your Solution

Time	Process	Content
10 Mins.	Introduction and Welcome Use Flip Chart #1-"Module III, You Can Present Your Solution"	Welcome Specialists to the third module of the You Can Help Our Customer's Succeed Specialists' Skills Training program - You Can Present Your Solution.
	Use Flip Chart #2 - "Steps in a Successful Sale"	Focus Specialists on the five steps in a successful sale. Emphasize step 4 - Present the Solution and step 5 - Close the Sale as the focus for today's training.
	Transition to audio samples	Today's module will wrap up the Specialists' Skills Training program. To begin today's session let's hear two audio examples of the sales process. **[Note to coaches: The audio samples serve as an attention-getter by allowing Specialists to recognize when the solution presentation method is used and not used and the associated outcomes of each call.]** **ATTENTION-GETTER DIRECTIONS** 1. Announce to Specialists that two audio samples of calls will be played and that Specialists should listen to both calls. Nothing else is required. 2. Play audio samples #1 and #2. Sample #2 will immediately follow #1. 3. After Sample #2 is finished stop the audiotape. 4. Transition to debrief.

Ask and discuss

What is the difference in the two calls?
Responses should include:

- *The first call took longer. Specialist recommended services throughout the call rather than all at once. Specialist received objections throughout call.*
- *The second call was somewhat shorter. Specialist presented the solution which included all products and services together. Specialist received less objections. Specialist stated value customer will receive.*

Ask and discuss

Which call is more efficient and effective, and why?
Responses should include:

- *The second call is better. The Specialist asked questions, determined needs and then presented a total solution that addressed customer's needs.*
- *The second call was a little shorter and received fewer objections -- resulting in a more efficient call.*
- *Specialist received more sales revenue credit than sample #1 -- resulting in a more effective call.*

Ask and discuss

Given the audio samples we just heard, what would the value be to both customers and Specialists of learning a new way of making recommendations?
Responses should include:

- *It is easier for customers to understand and it is quicker to present.*
- *To increase our **effectiveness** of helping customers. Allowing customer to see the real value that they get when purchasing our products and services.*
- *To increase our **efficiency** of handling calls. The new recommendation process should reduce the number of objections we handle which gets us to closing the sale faster.*

	Emphasize	Being more effective and efficient will allow BellSouth Small Business to compete in the competitive telecommunication marketplace. This is another reason why we are learning a new process of making solution presentations.
	Review Module III topics	Today's program is broken out into the following topics: • Reviewing Taking the Lead and Discovering Needs • Discussing and participating in activities on presenting solutions to the customer. • Discussing handling price objections. • Discussing closing the sale. • Practicing the entire sales process.
10 Mins.	Transition to Module I & II Review	Before we learn how to make solution presentations let's spend a few minutes reviewing skills we learned in Modules I and II of the You Can Series.

The Review will take much longer . . .

[Note to coaches: As a preparation point before this training session begins, determine which one of your Specialists would be the least hesitant in volunteering for the next roleplay - one that would also perform well at taking the lead and discovering customer needs. Ask Specialist a day or two before the scheduled training of his/her permission while emphasizing that the purpose is for the class to learn and not to embarrass the Specialist.]

Ask — <Volunteer's name> would you volunteer and roleplay being a Specialist for us?

Emphasize — Emphasize that the roleplay should only take a few minutes, the volunteer will not be embarrassed.

ROLEPLAY DEMONSTRATION DIRECTIONS:

1. Tell volunteer that he/she will be role-playing the Specialist through the uncovering needs step and to use his/her skills already learned from Modules I & II.
2. You are to roleplay the customer using the following facts:
   - You are Mr. or Ms. Miller, the owner of a hair salon with 4 full-time employees.
   - You inquire about adding another line to receive more calls so that you can book more appointments. The salon is expanding and hiring more cosmetologists. You can also ad-lib on additional problems/needs if necessary.
3. Allow volunteer to ask you questions and lead you through the process.
4. Stop the call when volunteer has uncovered your needs.
5. Show appreciation to volunteer by leading a round of applause.
6. Transition to first part debrief.

Ask and discuss

What steps did <volunteer's name> use in order to take the lead during the call?

Possible responses may include:

- *Built rapport with customer.*
- *Acknowledged customer's request and assured he/she could help.*
- *Invited the customer to partner by asking permission to get more information.*

Ask and discuss

What statements did <volunteer's name> use to ask permission to partner with the customer?

Possible responses may include:

- *Used his/her experience to position as a consultant/expert.*
- *Asked a transition question.*

  Possible examples include:

  -Sounds like you are undergoing some changes. I may be able to help you in other areas of your business in regards to your telephone service. May I ask you a couple of questions to ensure that you are getting the most valuable service available to you?

  -Mr. Customer, I have assisted many owners like yourself, may I ask you a couple of questions to ensure that we are meeting your needs as your telecommunications provider?

  -We offer our Small Business customers a number of ways to help increase revenues and decrease expenses. May I ask you a few questions about your business so that I can do a quick analysis of your account to see if we can better serve you?

[Note to coaches: If Specialist had difficulty in taking the lead or discovering needs and/or the answers to questions were not the suggested responses indicated above then consider asking the following question and coach Specialists through to the suggested responses included above.]

Ask and discuss	What could have <volunteer's name> done to improve taking the lead? • *See responses for above three questions.*
Ask and discuss	Why do we take the lead in calls? *Responses should include:* • *Taking the lead sets the stage for customers to receive expert help in gaining solutions for specific needs.* • *Fulfills customer expectations that we offer a consultative service.* • *Specialists gain control of conversation.* • *In taking the lead, Specialist has positioned him/herself as a partner with the customer.* • *Specialist can be more effective and efficient.*
Transition to second part debrief	Let's now focus on the second part of the call - the discovering needs process that <volunteer's name> performed.
Ask and discuss	You learned in Module II that there are two questions that we can ask to determine the customer's business operating environment (BOE). What are the two questions that were (or should have been) asked in our roleplay to determine the hair salon's BOE? *Responses should include:* • *Where do you serve your customers?* • *Do you tend to have long or short term customer relationships?*
Ask and discuss	In our roleplay the customer was the owner of a hair salon. What do you think is the most important core need for the hair salon? *Responses should include:* • *The ability to have an efficient office.* • *The ability to get calls for appointments.*

[Note to coaches: Consider asking the following question while referring Specialists back to what was taught in Module II.

- **Owners of hair salons tend to place the most emphasis – or value – on what communication capability?]**

Ask and discuss

What are the benefits in determining a customer's BOE? Why is it important for you to determine the customer's BOE?

Responses should include:

- *Allows Specialist to understand customer's business so that they can quickly identify specific needs of customer.*
- *Helps build Specialist confidence in partnering with customer by understanding where customer serves their customers and their customer's relationships.*
- *Demonstrates to customer that BellSouth is a customer-focused company.*

Ask and discuss

What did <volunteer's name> do to discover the hair salon's needs?

Responses should include:

- *Asked questions to determine business operating environment (BOE) and complexity of needs.*
- *Asked appropriate follow-up questions based on the BOE and customer's core need.*
- *Uncovered potential needs by identifying needs and then confirming needs.*
- *Acknowledged that BellSouth can provide solutions.*

[Note to coaches: While reviewing the following goals with Specialists, record goals on flipchart and consider posting in the room for future reference.]

Mins.	Transition to Module III goals	For the next four hours we will build on what we have learned from Modules I and II and perform the following: • Practice skills learned in Module I and II. • Explain tasks associated with solution presentation. • Recognize importance of linking recommendation to the value the customer receives. • Link recommendation to customer's needs. • Make effective solution presentations. • Handle customer price objections. • Close the sale using effective statements. • Practice the entire sales process.
10 Mins.	Use Flip Chart #2- "Steps in a Successful Sale"	Focus Specialists on step 4 - Present the Solution.
	Transition to solution presentation basics	Let's spend a few minutes talking about the basics of solution presentation. First, I will replay the audio sample where the Specialist correctly presented the solution to the customer. Your task is to closely listen to the steps taken in presenting the recommended products and services to the customer. Feel free to record any notes as necessary.
	Play audio sample #3	**[Note to coaches: This is just the solution presentation excerpt taken directly from the "good" sample that was played in Module III Introduction.]**
	Transition to asking question about the solution presentation process	How did the Specialist on the audiotape set-up the solution presentation? **[Note to coaches: The bolded phrases below are the actual steps in the solution presentation process. Write the specific step on the top of the board or flipchart and then record Specialist responses below.]**

	Board responses on flipchart	*Responses should include:* ***Set-up the presentation** by:* *- Confirming customer's needs.* *- Stating transition statements based on customer's needs and what products/services will be recommended.* *- Stating consequences*
	Ask and discuss	What were the key components to the actual presentation of products and services?
	Board responses on flipchart	*Responses should include:* ***Present products/services** by:* *- Presenting the products, features and associated value for the customer*
	Ask and discuss	How was the additional cost and installation date handled?
	Board responses on flipchart	*Responses should include:* ***Present investment and installation date** by:* *- Present the monthly additional investment for the customer and the date that the products and services can be installed.*
	Use Flip Chart #3 "Solution Presentation Steps"	Review the three steps with Specialists.
	Emphasize	The solution presentation process, as listed on this flip chart, may vary given certain call dynamics.
10 Mins.	Transition to asking questions to define solution presentation and benefits	Given what we just heard, how would you define solution presentation?

	Board responses	*Responses should include:* • *Process of analyzing customer needs and communicating the recommended products/services that add value to the customer's business.*
	Ask and discuss	What are the benefits of doing solution presentations like the one you just heard? *Responses should include:* • *Focuses on all customer's needs and is presented as a total solution before the customer has a chance to object.* • *Helps reduce most objections because presentation is based on customer's buying motives/needs and presents the consequences of not satisfying need(s).* • *Is more efficient as it results in a faster time to close the sale.* • *Allow products/services to be customized to solve customer's needs.* • *Increases overall sales revenue.*
Mins.	Transition to the next topic	Now that you have an overall picture of what solution presentation is and what the benefits are to our customers and BellSouth, let's analyze solution presentation and the required steps. First, let's discuss when placing a customer on hold is appropriate and how this can be of benefit to you when presenting the solution. This will be discussed next.
	Ask and discuss	When would placing a customer on hold assist you? *Responses should include:* • *When customer's needs are complex and a moment to reflect and put the presentation together is required without interruption.*
	Emphasize	If you feel that it is necessary to place a customer on hold, make sure you: • Request customer's permission AND, • Give the customer the reason why you are placing him/her on hold

	Ask and discuss	Who will share with us a statement of how they have placed a customer on hold? *Possible responses may include:* • *"Mr. Customer, would you mind waiting for just a moment why I put together a proposal given your needs?"* • *"Mr. Customer, may I place you on hold why I double check with our installation department?"* • *"Ms. Customer, may I leave the line for just a moment why I double check the exact charges for cellular service in your area?"*
	Ask, discuss and emphasize	When wouldn't placing a customer on hold be of any benefit to you, the customer or BellSouth? *Suggested responses include:* • *Customer's needs are simple and do not require Specialist any additional silent time.* • *Customer is in a hurry and can't wait.* • *Customer doesn't want to be placed on hold.*
Mins.	Transition to next topic	We have discussed the appropriateness of placing customer on hold in order to prepare for the presentation, now let's transition to the specific steps of the solution presentation process.
	Ask	Who can recall the first step in the solution presentation process? *Answer:* • ***Set-up the presentation** by:* *- Confirming customer's needs* *- Stating transition statements based on customer's needs and what products and services will be recommended* *- Stating consequences*

Ask and discuss

You have had a chance to hear a good example of presenting solutions to customers. Why is it important to set-up the presentation?
Responses should include:

- *So that customer knows that we have a tailored solution based on their specific, individualized needs.*
- *When we mention consequences it allows customer to really think about what could happen if the recommendation is not accepted.*

[Note to coaches: Lead discussion to the responses listed below. The suggested responses below are taken from the actual good audio sample played earlier.]

Ask and discuss

In the audio sample how did the Specialist confirm needs in the presentation set-up?
Responses should include:

- *Confirm needs: "You told me that you need more ways that your customers can get in contact with you, either by phone or fax so that you can be accessible."*

Ask and discuss

In the audio sample, what transition statement did the Specialist use in the presentation set-up?
Responses should include:

- *Transition statement: "Ms. Smith, based on the information you provided me I have put together a total solution to your problem and can review it with you now."*

Ask and discuss

In the audio sample, how did the Specialist handle consequences of not purchasing the products and services?
Responses should include:

- *State consequence: "I understand how important it is for you to receive calls, so that customer's don't get a busy signal when they call you..."*

Mins.	Use Flip Chart #3 to transition to Step 2	Solution Presentation Process. Review the first step with the Specialist and then focus on step 2: **Present products/services**
	Discuss	The next step in the solution presentation process is to present the recommended products and services.
	Emphasize	Before we discuss this next step let's recall the fundamental rule why people buy anything these days: • People purchase based on the value to be received in the product or service offered. The same is true about our Small Business Customer. • Small Business Customers purchase products and services as an investment in their business based on the value received. **[Note to coaches: Remind Specialists also that Small Business customers need our help and our expertise which is why they purchase our products and services. This was one of the learning points from Take the Lead.]**
5 Mins.	Transition to discussing value	In order to provide value to our customers, let's talk about what value is.
	Ask and discuss	Recall when you recently purchased a product/service that you were not familiar with - such as a VCR, lawn care service or computer. Think back on that time and consider why you made the purchase. Why did you make the purchase? *Responses should include:* • *The product or service provided me value - was of high quality.* • *The store clerk was very helpful and knowledgeable. This assistance allowed me to make the right decision.* • *The price was what I expected for the item.*

[Note to coaches: Consider asking the following question if Specialists are not responding to the above question:

- **Why did you purchase the item - was it based on price, service, product quality?]**

Ask

Who will share with us of a positive experience of purchasing a product/service that you were not familiar with?

[Note to coaches:

- **You may want to have an example to tell Specialists before they share their experiences.**
- **Ask volunteer the following question(s) in order to determine why Specialist purchased the product or service. The goal is to allow Specialists to see similarities in their buying experiences with that of a Small Business customer and to stimulate critical thinking.]**

- How did the product provide value to you?
- What role did quality play in your decision to purchase the item?
- If you were unfamiliar with the product/service did you seek help from a store clerk or expert?
- If yes, was the clerk helpful, and knowledgeable?
- If no, how could a knowledgeable store clerk have made the experience better?
- How did the store clerk or expert ask how you were going to use the product/service?
- How did the store clerk or expert present the product/service that was tailored to your specific needs and motives?
- How did the store clerk or expert show or describe how you would use the product/service so that you will be successful using it in future?
- Overall how pleased were you with the service from the expert and the product?

	Ask and discuss	Given your experiences in making purchases, what does value mean to you? *Responses should include:* • *The end result, or outcome that I receive from the product.* • *Receiving more than the amount of money I invested in the product.* • *Having a quality product that was tailored to my needs and that I feel comfortable with.*
	Coach point with group	There really isn't any difference in the way you feel towards value and service than the way our Small Business customers feel towards value and service.
	Ask	What do you think our Small Business customers' desires are towards value? *Responses should include:* • *They want us as the Specialist/consultant/expert to understand their business and determine their telecommunication needs for them.* • *They want us to present the products/services that are tailored to them and that will allow them to achieve higher success.*
5 Mins.	Transition to next topic	BellSouth Small Business customers feel the same way towards value. One of your responsibilities is to show the value that the customer will receive in purchasing our products and services.
	Ask and discuss	Given how we just defined value why is it best to express values to Small Business customers? *Responses should include:* • *Customer makes purchase decisions based on benefits to the customer, the business, and the customer's customer.* • *Can reduce objections later: Value is presented to customer in solution presentation phase. Most questions or objections will be addressed first, before customer has a chance.* • *Customer will compare value received relative to the investment.*

- *Our success depends on selling based on value customer receives in products not just what the features are of the products/services.*

10 Mins. Transition to next topic

Let's now spend some time seeing how the BOE can assist us in communicating the value Small Business customers receive when purchasing our products and services.

Ask and discuss

First, what are some of the benefits of determining a customer's BOE?

Suggested responses include:

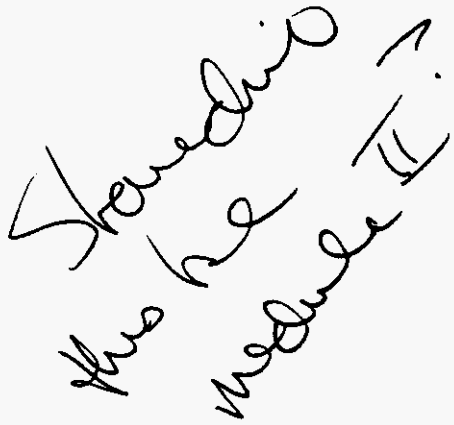
- *Helps Specialist understand how the customer does business from day-to-day.*
- *Helps Specialist organize a customer by where they do business and customer relationships.*
- *Is a valuable framework to determine overall business needs of customer.*
- *Helps you to understand the complexity of the customer's needs.*

Emphasize

That categorizing our customer's small businesses using the BOE can allow you to determine their core need and tailor your presentation to show the value the customer will receive from the products/services. This allows us to become more efficient and effective during our contact with the customer.

Transition to exercise

We are now going to participate in an exercise that will allow you to identify which products/services would solve typical small business needs for each of the core need represented in the BOE framework.



EXERCISE DIRECTIONS:

Distribute Handout III-1 to Specialists.

1. Pair up Specialists.
2. Explain exercise directions:
   - In your pairs, identify the products/services that could solve the typical needs of the small business customer for each core need provided.
3. Stop exercise after 5 minutes to allow for review and debrief.
4. Transition to reviewing Specialists' responses.

Review Specialists' responses and debrief exercise	Ask 2-3 pairs to share what products/services they identified for each core need.
Ask and discuss	Were there any products/services that solved more than one core need? *Answer:* • *Yes*
	What were some of the products/services that you listed more than once? *Responses should include:* • *MemoryCall Answering Service* • *Call Waiting* • *Additional Lines*
Ask and discuss	As you can see, many of our products/services can solve more than one core need. So, what is different? *Responses should include:* • *Customers purchase our products and services for different reasons.* • *The value the customer will receive from a product or service will be different depending on specific needs of their business and the complexity of their business.*

Transition to exercise	We are now going to participate in an exercise that will allow you to determine possible needs given a customer's BOE and a certain BellSouth product. This will allow you to determine what will provide value to the customer.
Explain	That you will lead the exercise by asking Specialists questions. Specialists are then to spend a few seconds reflecting on the question first and then write the customer's needs down on paper.
Ask and discuss	Let's say you determined that the core need for a real estate firm was 'Getting the Right Calls'. We already know that Memory Call could be of value to businesses that operate in this manner. What value does the firm have in purchasing Memory Call? *Suggested response includes:* • *Firm places a great deal of importance on receiving calls from key important customers.*
Ask and discuss:	Let's contrast the real estate firm with a retail dress shop. Because retail dress shops operate differently than real estate firms, they have a different core need. Typically, retail dress shops have a core need of 'Speeding Up Their Transactions'. MemoryCall can also provide benefits to our customers who operate in this environment. What could the need or value be for purchasing MemoryCall? *Suggested response includes:* • *Since the dress shop probably deals with many short-term customers, they must project an efficient and attentive environment within the store. Therefore, MemoryCall allows them to receive calls when assisting current customers.* • *Advertising their operating hours.*

Debrief by asking and discussing

MemoryCall came up in both instances. Although the product is the same, what would you do differently in presenting the MemoryCall solution in the above examples?

Suggested responses include:

- *While presenting the MemoryCall product refer back to* ***the specific needs*** *of the real estate firm and retail dress shop (as discussed in Module II - discovering needs).*
- *Present the* ***product benefits and the value*** *the customer will receive in purchasing MemoryCall.*

Emphasize

That it is not always the BOE that determines customer's needs or the appropriate solution. It is important for you to use the BOE as a guideline and listen to what the customer has to say. Let's explore this thought.

Ask and discuss

For example, some exclusive retail stores cater to certain specific customer types and could possibly have more than one core need - like having an efficient store and speeding up their transactions. What would you do in a case like this?

Responses should include:

- *Ask questions such as: where do you conduct the majority of your business? or, when do you find it difficult to handle your customers?*

Ask and discuss

What benefit do you and our customers receive in presenting solutions in this manner?

Responses should include:

- *Customer realizes the true value of the product/service - realizes the need in having the product/service.*
- *Greater chance that there will be fewer objections, faster closes and an increase in Specialist's sales revenue.*

[Note to coaches: Ask the following question as a lead-in to the Exercise. Acknowledge all responses to the question before transitioning to the Exercise.]

	Ask	When you make a purchase don't you like to know how that product or service will benefit you, what value you will receive rather than just knowing how the product works?
	Confirm	Our Small Business customers feel the same way towards products and services. Not only do they want to know the features; but, more importantly they want to know the value they will gain from making the purchase and how the product/service applies to their specific situation.
	Ask and discuss	What is the difference in value versus product features? *Suggested responses include:* • *Features describe how a product or service works or operates.* • *Value describes what is gained by having the product or service.* • *Value is achieved when the product/service solves customer's problem.*
10 Mins.	Transition to Exercise	Next, we will participate in an exercise that will allow you to determine values/benefits and product applications given certain products/services and associated features. **EXERCISE DIRECTIONS:** 1. Distribute Handout III-2 to Specialists. 2. Explain exercise directions: - For each product listed on the sheet list the benefits/value and possible product application that the Small Business customer would receive. 3. Stop exercise after 5 minutes to allow time for review and debrief. 4. Transition to reviewing Specialists' responses.

Debrief by asking question and reviewing answers for the three Small Business Customers in Exercise

What benefits/values and possible product applications did you come up with for each of the customers in the exercise?

Possible Answers Include:

Customer #1

- *Can create a large company image.*
- *Allows urgent calls to be handled as soon as possible, resulting in increased customer care.*

Customer #2

- *Since calls can be forwarded to a different location all calls will be received resulting in efficiency.*
- *Provides flexibility in whether owner wishes to answer calls or to have MemoryCall Answering Service pick up the call.*

Customer #3

- *Saves time in long-run by handling conducting business with more individuals.*
- *Creates an image of professionalism in the workplace.*

	Coach Specialists on the following points	• During the solution presentation phase it is critical to confirm the value the customer will receive from purchasing our products and services and how the product applies to the small business rather than just presenting the product features. • Recall how much better the call went between the example and non-example. When specialists present products and services in this manner their calls can be the same.
	Use Flip Chart #3 "Solution Presentation Process" to review steps 1 and 2	Okay, we have already discussed step one - Set-up the Presentation, and step two - Present Products/services.
5 Mins.	Transition to next topic	Let's now focus on step three of the solution presentation process - Present Investment and Installation Date.
	Ask and discuss	Why should Specialists determine the investment required and installation date? *Suggested responses include:* • *Small business customers want to know investment per month.* • *Aids in the overall package by having basic questions already answered.* • *Presenting this information aids in achieving the end result - the sale.*
	Transition to next topic	For each of the solution presentation steps just listed, let's brainstorm on how we can effectively execute each step.

BRAINSTORMING SESSION DIRECTIONS:

For each step you will:

1. Write the step on the top of easel chart.
2. Ask Specialists how to achieve each step effectively.
3. Record Specialist responses on easel chart.
4. Transition to next step.
5. Repeat steps 1 - 4.

[Note to coaches: During the brainstorm have Specialists provide you with an actual example of how to execute a step. For example, don't just have Specialist say "use a transition statement" but have Specialist actually provide an example of a transition statement. This will allow Specialists to think of actual situations and examples.]

Write on easel

Presentation Set-Up

Ask and discuss

In thinking about how you will apply the new solution presentation method back on-the-job, what are some ways to effectively set-up a solution presentation?

Record responses from class on easel.

Suggested responses include:

- *Restate whatever the issue/problem the customer is having. For example, "So that you don't miss any calls from your customer's..."*
- *Rather than state the negative consequence, consider presenting the positive consequence. For example, "So that you can receive every call from your customers..."*
- *State consequence in a matter-of-fact tone.*
- *Use transition statement. For example, "Mr. Customer, I have taken the time to put together a total solution to for your specific needs. I would be happy to review it with you now.."*

Write on easel

Present products/services

Ask and discuss

What are some ways to effectively present the products/services that are recommended?

Record responses from Specialists on easel
Responses should include:

- *Present the products/services based on the value and benefit customer will receive. Also, present the product application so the customer realizes the product potential.*
- *Present product and benefit, product and benefit rather than presenting all products together and then all benefits together. This way customer doesn't get confused as to what benefit goes with what product. For example, "Mr. Customer, I feel that Call Forwarding will allow you to receive calls at your remote location so that you do not miss a call and customer's can reach you."*
- *State product values and benefits not just product features.*
- *Refer back to notes that were taken while discovering needs in order to determine best solution for customer.*
- *Tie the solution(product/services) back to needs.*
- *Ensure that each product/service presented solves specific customer needs.*
- *Share with customer why product or service will solve need(s).*

Write on easel

Present investment and installation date

Ask and discuss

How can we effectively present the investment and installation date?
Suggested responses include:

- *Consider the following phrases for stating the cost:*
  - *"Mr. Customer, the additional monthly investment on your part is..."*
  - *"To solve your telecommunications needs so your business will grow, the additional monthly investment will be..."*
  - *"To provide you with this solution, the monthly*

investment is.., about two orders that you receive."
- *"Ms. Customer, I can provide you with these services for a minimal monthly investment of...How does this sound?"*

- *If the customer has a preference for a certain day for the installation, try to secure that day and return to customer saying, "I can arrange for our installer to be there at..." or "I would be happy to accommodate you and have our installer there on.."*

Emphasize

Specialists MUST still provide full disclosure on all optional products/services and prices. Presenting the investment and installation date DOES NOT mean forgetting to disclose. This will be discussed later.

5 Mins. Transition to next topic:

Now that we have discussed making the presentation to the customer, let's spend some time on how we can recognize buying signals from the customer.

Ask and discuss

What are customer buying signals?
Suggested response includes:

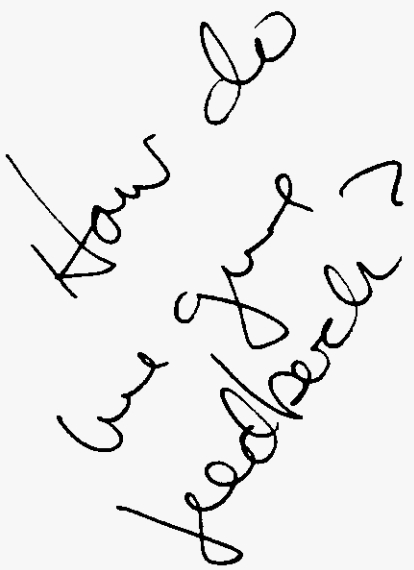
- *Something customer says and the way they say it that indicates they feel positively about the recommendation.*

Ask and discuss

What are some examples of buying signals that you have encountered?
Suggested responses include:

- *Customer says positive things about the products and services*
- *Customer asks Specialist more questions about the products/services.*
- *Customer talks about products/services as if they already have it.*
- *Customer asks how soon products/services can be provided.*
- *Customer offers more detail on current situation.*
- *Customer is silent -silence can be a buying signal.*

	Ask and discuss	You have just finished presenting your solution to the customer. What happens next? *Suggested responses include:* • *If customer displays buying signals, then close the sale.* • *If customer is somewhat hesitant, then inquire about any questions customer may have and/or offer to submit a written proposal and set up a time to review. If customer feels comfortable after having heard your answers then transition to gaining consensus and closing the sale.* • *If customer has any objections, then handle the objections confidently and appropriately, and then close the sale.*
	Emphasize	Remember! One of the goals in making solution presentations is to reduce any objections from the customer.
45 Mins.	Transition to exercise	Before we discuss pricing objections we are going to participate in an activity that will allow us to practice our solution presentation skills.
	Introduce the exercise	This exercise will allow you to practice your presentation solution skills to this point. You will be divided into small groups and will listen to audio samples of a Specialist who takes the lead of the call and uncovers needs. The audio will then be stopped for 60 seconds for you to put together your solution presentation. You will then share a few of your presentations in your teams of 2 or 3. **[Note to coaches: The time allocated for this activity is 45 minutes. This equates to approximately 15 minutes per call.]** **ACTIVITY DIRECTIONS:** 1. Divide class into groups of 2 or 3 Specialists. 2. Play audio sample #4 (immediately following audio sample #3) for the entire group. 3. Stop audiotape after Specialist on tape has uncovered needs.



4. While in teams, allow Specialists to craft s... presentation individually for 60 seconds.
5. After 60 seconds has passed have Specialists stop working.
6. Within the small teams, allow Specialists to take turns sharing what solution presentations.
7. After Specialists have presented their solution in their teams, play the rest of the audio sample and listen to audio sample of best case solution presentation.
8. Have Specialists discuss in teams any similarities or differences in what they came up with versus the audio's solution presentation.
9. Have Specialists consider the following points to during their team discussion:
   - How did Specialist tie solution back to customer's needs?
   - How did Specialist state positive or negative consequences?
   - Was the price and installation date presented?
   - Would the products and services selected solve customer's problem?
10. Repeat steps 2 - 9 for audio samples #5, and #6.

Transition to large group debrief by asking and discussing	What went well during your solution presentation?
Acknowledge	All responses from Specialists.
Ask and discuss	What do you think you could have done better?
Acknowledge	All responses from Specialists.
Confirm	That Specialists will have additional chances to practice the solution presentation process at the end of today's training session.
Ask	What questions do you have regarding solution presentations before proceeding forward?

	Transition to next topic	Although you will receive fewer objections when using the solution presentation process, you will encounter some objections. The next topic we will discuss pricing objections and the best way to handle them confidently.
10 mins.	Ask and discuss	What is probably the most common objection you get from the customer? *Response should include:* • *Price*
	Explain	Any price is too much if the customer does not fully understand the value of the products and services being recommended.
	Ask and discuss	What are some statements to use when acknowledging a price objection from a customer? *Responses should include:* • *I can understand how you might see that as a problem.* • *I understand how that experience could cause you to be cautious with trying a new service.* • *I know how you feel. Many of our other customers felt that way too, and they found that it paid off in the long run.* • *It is an investment in your business' future success.*
	Emphasize	These types of statements should be used directly following a price (or any other) objection before moving onto responding to their objection.
	Ask and discuss	Can someone share how they typically overcome the price objection?

[Note to Coach: Board the responses of three to four Specialists.]

Ask and discuss — What other strategies/responses can be used to overcome the price objection?

[Note to Coach: Board these responses, making sure the following points are raised:]

Strategy/Response	**Example**
Remind the customer of the value they are receiving	"You will not miss important business calls"
Discuss the negative consequences of not purchasing the product(s)/service(s) you are recommending	"You may be losing business without it"
Link the recommendation to the value they place on each customer	"How much is one call/customer worth to you on average?" Note: the amount stated is usually less than it takes to have the service

5 mins. Present — There are several things that need to happen in order to close the sale properly.

Ask and discuss — What needs to occur during the closing of the sale?

		Responses should include: • *Recap agreed upon products/services* • *Provide price* • *Confirm date of installation* • *Provide disclosure statement* • *Say appropriate closing statement*
	Distribute	Handout III-3 to the Specialists.
	Request	Volunteer to read the closing statements.
	Emphasize	These are just examples. Feel free to select one that you would feel comfortable using, or adapt one to fit to your style.
	Ask and discuss	Why would it be beneficial to close the sale with one of these closing statements? *Responses should include:* • *Ends the call on a high note* • *Leaves customer feeling good about the interaction* • *Leaves customer feeling that he/she made the right decision* • *Leaves a lasting positive impression on the customer*
1 Hour	Introduce the activity	This next activity will challenge you to apply all that you have learned, from Module 1: Taking the Lead, to Module 2: Discovering Customer Needs, through today's Module: You Can...Present Your Solution.
	Explain the activity purpose	To allow you to practice the skills and techniques used throughout the entire selling process.

Explain activity directions

- Divide large group into groups of three. In each group there are three roles: Specialist, Customer, and Observer.
- Distribute Handout III-4 to each group. Explain that each handout consists of three customer scenarios and three Observer Feedback Forms. Each participant is to receive one customer scenario and one Observer Feedback Form.
- Each group should decide the order of who will roleplay the Specialist, Customer and Observer.
- Explain that after each roleplay they will switch roles so each participant will have the opportunity to roleplay each position.
- The person in the Specialist role should approach this roleplay as if it were a real call from a customer. He/she will be expected to interact with the customer, drawing upon the skills and techniques learned throughout Modules 1, 2, and 3, in order to effectively and efficiently close the sale.
- The person in the Customer role should take a few moments to review Customer Scenario #1. After reviewing the scenario, he/she should proceed forward as if they were the customer. Being as realistic as possible.
- The person in the Observer role should (1) write the name of the person acting as the Specialist on the Feedback Form, (2) observe the Specialist, and (3) document on Feedback Form #1 how the Specialist performed in each of the areas.
- The roleplay should last approximately 10 minutes.

Create a flipchart with these three Observer tasks and the note.

- After the roleplay is complete, the Observer should:
  - Ask the Specialist how they confirmed needs, transitioned to the presentation, stated consequences, presented products/services and presented investment and installation date.
  - Provide feedback to the Specialist on the strengths of the interaction.
  - Discuss areas for improving Specialists' solution presentation skills and/or other ways of handling the call.

  [Note: The observations recorded on the feedback form should serve as input into this discussion].

- Feedback should take approximately 5 minutes.
- Participants should switch roles and the entire roleplay process should be repeated, using Customer Scenario #2 and Feedback Form #2.
- After the second roleplay is complete, participants should switch roles one last time and complete the entire roleplay process, using Customer Scenario #3 and Feedback Form #3.

[Note to Coach: Explain that it is important that the Observer completes the Feedback Form as comprehensively and accurately as possible. The Feedback Forms will be used to reflect upon later.]

Transition to large group debrief

Let's now come back as one large group and debrief the activity.

	Ask each triad/group	• How they confirmed needs, transitioned to the presentation, stated consequences, presented products/services and presented investment and installation date. • What was difficult in setting up the presentation? Presenting products/services? Presenting investment and installation date? • What would you do differently? **[Note to Coach: Request that the Specialists give you the Observer Feedback Forms they completed on the person they observed. Remind them to write the Specialist's name on the form.]**
10 mins.	Ask and discuss	What are the key learnings you will take back to the job? *Suggested responses:* • *The importance of linking the recommendation to the value the customer receives.* • *The importance of presenting solutions using the process discussed.* • *How to handle customer price objections* • *Presenting solutions to customers in the suggested way minimizes objections resulting in a more effective and efficient call.* • *Closing the sale using effective statements*
	Explain	During the next two weeks I (the Team Manager) will participate in two more roleplays with each of you (the Specialists). **[Note to Coach: Schedule Roleplay II with each of the Specialists within two weeks following training. Refer to the following page for Roleplay II Directions, Debrief Tips, and Roleplay II Scenario.]**

Roleplay II

Directions:

- Explain Roleplay II directions to the Specialist.
- You will play the role of customer, while the Specialist plays the role of Specialist.
- Use the script that follows to assist you in your role as customer.
- In order to make the roleplay more realistic, set the Specialist up in either a conference room with a phone or your office.
- Call the number where the Specialist is located and perform the roleplay over the phone.
- Use the Observer Feedback Form already partially completed (during Roleplay I) to record your observations of the Specialist's performance.
- Meet with the Specialist after each roleplay is complete and provide them feedback.
- Allow approximately 20 minutes total for each roleplay and debrief.

Note: Emphasize to the Specialist that this exercise is intended only as a tool for self-awareness and growth. It will not be used or serve as input into anything else.

Debrief Tips:

- Ask the Specialist how they confirmed needs, transitioned to the presentation, stated consequences, presented products/services and presented investment and installation date.
- Provide feedback to the Specialist on the strengths of the interaction.
- Discuss with the Specialist the areas for improving the presentation skills and/or other ways of handling the call.
- Walkthrough your observations with the Specialist. Be specific!
- Refer to behavior which can be changed
- Discuss any trends you see -- similarities between Roleplay I observations and your own
- Provide both constructive and positive feedback
- Allow Specialist to ask questions

Roleplay II Scenarios

Roleplay A - Customer Scenario

Customer Profile:	You are Terry Murphy and are a new business owner. You and your brother have started a tool rental shop in Baton Rouge, Louisiana. You are not knowledgeable of your telecommunication needs and are easily confused by any telecommunication jargon the Specialist uses. You are open to the Specialist's suggestions but get overwhelmed easily.
Customer's Name	Terry Murphy, Co-owner Murphy's Tool Renters
Address	812 Palmer Drive Baton Rouge, LA 34294
Phone Number	973-445-0451
Purpose of call	The purpose of your phone call is to start up your business.
Additional Information	• If asked, explain that you and your brother work in the store. • If asked, explain that you rely on a high volume of renters.
Potential Objections	Depending on how effective the Specialist was during their solution recommendation, object to either some of the products/services recommended and/or object to the price.

Roleplay B - Customer Scenario

Customer Profile:	You are Carmen Coppola, the office administrator of a newly formed law office. You are calling to establish phone service at the law office. Besides yourself, the office consists of four attorneys and two paralegals. As a result of your stressful work environment, you are somewhat impatient and challenge the recommendations made by the Specialist.
Customer's Name	Carmen Coppola, Office Administrator Dewey, Cheetum & Howe
Address	8301 Sunset Drive *Suite 800* Fort Lauderdale, FL 35691
Phone Number	407-244-0007
Purpose of call	The purpose of your phone call is to start up your business.
Additional Information	• If asked, explain that the attorneys and paralegals primarily conduct business in the office. • If asked, explain that you rely on building and maintaining strong client relationships, as most of your new clients are referrals.
Potential Objections	Depending on how effective the Specialist was during their solution recommendation, object to either some of the products/services recommended and/or object to the price.

Audio Scripts

[redacted]

you can . . .

PRESENT YOUR SOLUTION

BELL*SOUTH* Small Business Services

Audio Sample #1

Specialist:	Hi! This is Ann Shore with BellSouth. How may I help you?
Customer:	This is Sally Smith with Forever Green Florist. I wanted to ask about adding another line - I think I am missing calls.
Specialist:	I would recommend another line as well, sounds as if you do get calls. An additional line costs $54.40 per month and can be installed this Thursday.
Customer:	Is it $54.40 more than my regular line? Seems kind of high.
Specialist:	That is correct, it is in addition to your regular line charge. It will allow you to get more calls though.
Customer:	Okay then, but do I need to purchase another phone?
Specialist:	Does your existing phone have the capability of having two lines?
Customer:	Yes, but I never use the line two button.
Specialist:	Then no, you don't need to purchase additional equipment, your existing phone will work fine. Ms. Smith, Can I get your current telephone number?
Customer:	Sure, its 490-222-7676.
Specialist:	Thanks for waiting. I have added your line effective this Friday. The number for your new line is 490-222-7001.
Customer:	Now, do I have to give out both telephone numbers to my customers?
Specialist:	That brings me to my next recommendation, with our hunting service you only have to give out your original existing number. How hunting service works is if one line is busy it will automatically roll to the second line. This too can be added to your line on Thursday.
Customer:	Now, do I have to purchase any additional equipment to use Hunting Service?
Specialist:	No you don't. It works with your existing business phone you already have.
Customer:	That sounds great. Is there an additional cost?

Specialist:	Yes, hunting runs $25.30 per month per line. For a total of $50.60 per month.
Customer:	That seems kind of high for the service. What sort of additional benefits do I get for having this service?
Specialist:	If you don't purchase hunting service then you will have to give out both telephone numbers.
Customer:	Oh! That's okay. I would rather do that then spend an additional $50 dollars a month!
Specialist:	Ms. Smith, can you tell me more about your small business?
Customer:	Well, I am in the floral business and I sell an array of flowers and plants. I have always had a green thumb all my life! I am thinking about breaking into silk flower arrangements as well. I am going to explore a fax service whereby my customers can fax me orders.
Specialist:	Great! Sounds like you are doing well. You know, the fax service would require an additional line. This allows you to have a dedicated line that would receive your incoming faxes. Our installer can also install this for you on Friday. The investment for the fax line per month is $54.40.
Customer:	Another 54.40!!!? Don't you guys have anything like the more I purchase the more I save?
Specialist:	Yes, that is correct; however, that price I quoted you reflects that. Ms. Shore, you can always cancel the fax line at a later date if it doesn't work out.
Customer:	Yes, that is true. Okay go ahead and add the fax line. You know, I have another question regarding the two lines I will have - what happens if both telephone lines are busy?
Specialist:	You would probably be interested in BellSouth's MemoryCall Answering Service.
Customer:	Is that like voicemail boxes?
Specialist:	Yes, MemoryCall Service is an enhanced answering and voice messaging system that answers busy or unattended lines. Calls are forwarded directly to MemoryCall Service which provides a means of recording, storing and retrieving important messages. All you do is call a separate number to retrieve messages. The

	cost of this service is an additional $15.40 per month. How does this sound to you Ms. Smith?
Customer:	Sounds kind of tricky to retrieve messages that way. I am used to just pressing a button on my answering machine.
Specialist:	It really is simple. The instructions are easy to follow and you can check messages from anywhere.
Customer:	Well, okay. So, I will have to pay an additional $15.40 for MemoryCall huh? Wow! With all these services it is going to really add up. How much does all this come to anyway?
Specialist:	An additional cost of $174.80 per month to have all these services.
Customer:	Boy that is a lot!! Seems kind of high for what I will be getting in return.
Specialist:	Well Ms. Shore, you will be able to receive additional calls and serve your customers which outweighs the cost per month, don't you think?
Customer:	Yes, you're right. Okay go ahead and add the services. Now, when did you say these services can be activated?
Specialist:	We can have a technician at your location this Thursday afternoon and, MemoryCall can be added by the close of business tomorrow.
Customer:	Okay.
Specialist:	Ms. Smith, let me take a minute to give you a breakdown of the costs and explain a little more about the products and services you have purchased.

Audio Sample #2

Specialist:	Hi! This is Ann Shore with BellSouth. How may I help you?
Customer:	This is Sally Smith with Forever Green Florist. I wanted to ask about adding another line - I think I am missing calls.
Specialist:	I would be glad to help you with this. Can I get your current telephone number so that I can pull up your record?
Customer:	It's 490-222-7676
Specialist:	Thanks for waiting. I would be glad to add an additional line but first may I ask you a few questions to get familiar with your floral business?
Customer:	Sure, I have never had anyone ask me anything before.
Specialist:	How do you serve your customers. Do they usually come to your shop?
Customer:	Most customers call their orders in; however, some do stop in and purchase flowers and plants. Probably 90% call their orders in to me. I am considering adding another line so customer can fax orders.
Specialist:	Sounds like a great idea. Ms. Smith, do you typically have long or short term customer relationships?
Customer:	Currently my customer base is 100 and growing! So I have a lot of repeat business and long-standing customers. I also have my share of 'one-timers' as well.
Specialist:	Sounds like you are doing a super job.
Customer:	Thanks. My orders are increasing. I currently have three full-time employees and may have to expand it to four. I have been receiving anywhere from 20-25 orders a day at an average of $35 - 40 dollars per order!!
Specialist:	Super! Ms. Smith I can help you with all your telecommunication needs so you can be even more successful and grow your business. Ms. Smith, you mentioned that you might be missing valuable orders from your customers.
Customer:	Yes! I have had customers tell me that they have got a busy signal when calling. I want to be accessible to my customers.

Specialist: You told me that you need more ways that your customers can get in contact with you - either by phone or fax - so that you can be accessible and receive orders. Is that correct?

Customer: Yes. I can't grow my business if I don't handle more calls.

Specialist: Ms. Smith, based on the information you provided to me I have put together a total solution to your problem and can review it now with you.

Customer: Great!

Specialist: I understand how important it is for customers to reach you, so that customer's don't get a busy signal I am recommending another two lines. One for the call overflow and another for your dedicated fax service. This will provide customers access to you - phoning and faxing - so that you can receive orders and expand your business. I have also included Hunting service so that if your first line is busy the incoming call is automatically sent to the next line. With hunting service you can handle more calls this way which is important to the growth of your business. Lastly, I recommend MemoryCall Service which will allow customers access to you by leaving messages and orders in case both lines are busy. This will ensure that you get every call. So that your customers can access you, the additional monthly investment on your part is $174.80 and I can have your complete order installed this Friday. How does this sound?

Customer: Explain the hunting service again. How much is this service costing me?

Specialist: Sure, you mentioned to me earlier that some of your customers are having trouble accessing you. BellSouth's Hunting service allows you to handle more calls so you can grow your business. How it works is if your first line is busy the call will automatically roll to your second line. Your monthly investment is $25.30 per month per line for a total of $50.60 per month. It is a popular service among our Small Business customers and I recommend to you as well.

Customer: Seems like a lot for the service.

Specialist: I see where you are coming from. Some of my customers felt that way too, and they found that it paid off in the long run. Ms. Smith, Hunting service will allow you to handle more calls which I know is important for growing your business. The cost per month is almost one of your orders, and just think of the

	additional number of orders you will receive by having Hunting service. I highly recommend it to you.
Customer:	Okay, great! Is it okay if the installer comes out Friday morning though?
Specialist:	Yes, I will be happy to arrange that for you. Ms. Smith I know that this solution will solve your telecommunication needs and allow you to be even more successful in your floral business.
Customer:	Yes, I am excited. I am glad I called this morning.
Specialist:	Great. Let me take a moment to give you a breakdown of the products and services you have purchased and the costs associated with each product.

Audio Sample #3

Specialist:	Ms. Smith, you told me that you need more ways that your customers can get in contact with you - either by phone or fax - so that you can be accessible and receive orders. Is that correct?
Customer:	Yes. I can't grow my business if I don't handle more calls.
Specialist:	Ms. Smith, based on the information you provided to me I have put together a total solution to your problem and can review it now with you.
Customer:	Great!
Specialist:	I understand how important it is for customers to reach you, so that customer's don't get a busy signal I am recommending another 2 lines. One for the call overflow and another for your dedicated fax service. This will provide customers access to you - phoning and faxing - so that you can receive orders and expand your business. I have also included Hunting service so that if your first line is busy the incoming call is automatically sent to the next line. With hunting service you can handle more calls this way which is important to the growth of your business. Lastly, I recommend MemoryCall Service which will allow customers access to you by leaving messages and orders in case both lines are busy. This will ensure that you get every call. So that your customers can access you, the additional monthly investment on your part is $174.80 and I can have your complete order installed this Friday. How does this sound?
Customer:	Explain the hunting service again. How much is this service costing me?
Specialist:	Sure, you mentioned to me earlier that some of your customers are having trouble accessing you. BellSouth's Hunting service allows you to handle more calls so you can grow your business. How it works is if your first line is busy the call will automatically roll to your second line. Your monthly investment is $25.30 per month per line for a total of $50.60 per month. It is a popular service among our Small Business customers and I recommend to you as well.
Customer:	Seems like a lot for the service.
Specialist:	I see where you are coming from. Some of my customers felt that way too, and they found that it paid off in the long run. Ms. Smith, Hunting service will allow you to handle more calls which

	I know is important for growing your business. The cost per month is almost one of your orders, and just think of the additional number of orders you will receive for having Hunting service. I highly recommend it to you.
Customer:	Okay, great! Is it okay if the installer comes out Friday morning though?
Specialist:	Yes, I will be happy to arrange that for you. Ms. Smith I know that this solution will solve your telecommunication needs and allow you to be even more successful in your floral business.
Customer:	Yes, I am excited. I am glad I called this morning.
Specialist:	Great. Let me take a moment to give you a breakdown of the products and services you have purchased and the costs associated with each product.

Audio Sample #5

Specialist:	Good afternoon, this is Jeff Bowen with BellSouth. How may I help you today?
Customer:	Yes, this is Mark Johnson and I am starting a new business and would like new service.
Specialist:	Congratulations! What type of business are you starting?
Customer:	House painting and pressure washing of houses and concrete.
Specialist:	Sounds like you will be busy, everyone always needs painting done. Mr. Johnson before we determine exactly what your needs are may I ask you a few questions?
Customer:	Please do!
Specialist:	I take it you will be serving your customers away from your office?
Customer:	That is correct. All business is conducted at customer's homes. The office will handle incoming calls, schedule appointments, receive mail and provide a place for my 3 employees to meet.
Specialist:	Mr. Johnson, would you classify your customer base as short-term first-time customers or, long-term relationship customers?
Customer:	Both really. I am expecting half to be short-term customers and 50% to be long-term customers like other small businesses.
Specialist:	How do your customers reach you?
Customer:	For the first 6 months or so I expect all of my jobs to come over the telephone. I also have a pager number that I give out.
Specialist:	Great. Mr. Johnson, I have helped many customers such as yourself that are just starting up a new business. Typically, small businesses such as yours need to make sure that you don't miss any calls from existing or potential customers.
Customer:	Yes, that is very important to be accessible to employees and customers.

— PAUSE TAPE HERE —

Specialist:	Based on your needs Mr. Johnson I have put together a solution that fits your needs of starting up your business and would be glad to review it with you at this time.
Customer:	Okay.
Specialist:	So that you don't run into trouble with having your customers access you I am first recommending 2 business lines. This will allow you to receive calls from customers. In addition, I suggest adding BellSouth's MemoryCall Plus Answering Service which will allow customers to leave you messages after hours. In addition, your employees can page you when a message is urgent without having to dial another number. That way, employees can always access you as well. The amount per month for these services is $105.70 and can be installed this Thursday. How does this sound to you?
Customer:	Seems kind of high.
Specialist:	I understand you are starting a new business and that you need to control expenses. Can I ask you what the average amount of a service order is?
Customer:	It can range between $75 - $125 per job.
Specialist:	The monthly cost of having these telecommunication services is roughly one job! Don't you think by having your these services you will be able to receive additional calls -- more than if you had just one line?
Customer:	Yes, that is a good point. I hadn't thought of it like that. Sure, sign me up!
Specialist:	I'm sure you will be pleased with your decision. I have enjoyed helping you succeed in your start-up. Let me take a minute to provide you with a breakdown of the products and services you have purchased and their associated costs.

Audio Sample #6

Specialist:	Good morning. This is Doreen Smith with BellSouth. How may I help you today?
Customer:	Yes, this is Marco Cantini with Roma's Italian Eatery. I wanted to see about adding a fax line for customer's to fax their lunch orders to me. You know, it is real popular these days to fax your lunch orders ahead of time.
Specialist:	Yes! Faxing sure has reinvented the way we do business. Mr. Cantini, can you give me your telephone number so that I may pull up your account?
Customer:	Sure, it is 301-443-7928.
Specialist:	Thanks for waiting. I'd be happy to help you with adding the fax line in. Before I do so, may I ask you a few questions to ensure all your telecommunication needs are currently being met?
Customer:	Okay. But I only have a few minutes!
Specialist:	Certainly. Given that you own a restaurant, your customers visit you, correct?
Customer:	Yes. We don't have delivery service as of yet.
Specialist:	Mr. Cantini, how would you classify your customer relationships -- longer or short term?
Customer:	Definitely shorter term. We are mainly an Italian sub shop.
Specialist:	Are you having any difficulties with customer's reaching you?
Customer:	Well, not really; however, sometimes my customers that come into the shop have to wait until I am finished on the phone -- which is kind of tricky.
	— PAUSE TAPE HERE —
Specialist:	I see. Mr. Cantini, I have assisted many restaurants like yours improve their business by allowing owners to get calls and be efficient. Given your situation and specific concerns, I have a solution and would like to review it at this time.
Customer:	all right.

Specialist: Your solution consists of an additional line that will be dedicated to your incoming fax orders. This will allow you to provide an additional service for your customers. In addition I recommend MemoryCall Answering Service which allows customers to leave you messages when you are tied up with a walk-in customer. This will ensure that all your calls are received either in person or with MemoryCall. Lastly I recommend Call Waiting which notifies you of another incoming call when you are on the phone with a customer or supplier. You then have the option of answering the new incoming call or allowing MemoryCall to handle the call. This last option is very popular with small businesses, such as yours, and allows you the freedom and flexibility that is required in running a fast-paced business. Mr. Cantini, the total monthly cost for you to have these services is $61.70 and our technician can install the new line next Tuesday. How does this sound to you?

Customer. Yea. I have heard of voicemail before, is that what that MemoryCall is all about? My daughter thinks I should get that as well.

Specialist: Yes, that is correct.

Customer: Okay. Now, will I get directions on how to use the MemoryCall and Call Waiting?

Specialist: Yes sir. In fact, let me give you a number to call if you have any difficulties with MemoryCall, it is 800-356-3093. Mr. Cantini I am glad these products and services will help you succeed in your business. Let me take a minute to give you a breakdown of the products and services you have purchased and their associated costs.

Audio Sample #4

Specialist:	Good afternoon, this is Diane with BellSouth. How may I help you today?
Customer:	This is Amy Parker, office manager with Dean & Pennington Law Offices. We are opening a satellite office just south of Fort Lauderdale and would like to establish new service.
Specialist:	Great. I'd be happy to assist you with that need. Ms. Parker can I get the address of where you would like new service added?
Customer:	Sure it is 23905 South Tamiami Trail, Suite 400, Fort Lauderdale, FL 32584.
Specialist:	Thanks for waiting Ms. Parker. I would be happy to add another line. However, before I determine what your telecommunication needs are for that location may I ask you a few questions?
Customer:	Sure, I have a few minutes.
Specialist:	Your attorneys will probably be serving the majority of their clients at the new Dean & Pennington law office correct?
Customer:	Yes, that is correct.
Specialist:	And, your relationship with your clients tend to be primarily long term?
Customer:	That's also correct. We have served many families and individuals more than once.
Specialist:	About how many employees will be at the new location?
Customer:	We will have 3 attorneys, 1 law clerk and 2 secretaries.
Specialist:	You probably have a need to have an efficient office, correct?
Customer:	Yes, the attorney's and staff are already requesting that we get them enough lines with voicemail!
	— PAUSE TAPE HERE —
Specialist:	Yes, I agree. Ms. Parker, I have helped many attorney offices establish new service. Given your circumstances I have a plan that will accommodate the attorneys and staff in the new location

in order to have an efficient office. May I review the plan with you now?

Customer: Sure.

Specialist: I am recommending 4 lines to accommodate incoming and outgoing calls, as well as faxes. This should allow enough capacity to handle all your needs. Additional lines can always be added. The lines will have Hunting Service so that if the first line is busy it will roll to the second. This is a handy service so that your clients have one number into the office. In addition, I highly recommend MemoryCall Answering Service Extension Mailbox so that callers can leave messages for a specific employee. This sends a nice image to your clients and allows your employees to maximize their work time, if needed. Lastly, a popular choice among law firms is Three-Way Calling so that the attorneys can add other clients or individuals on the line and complete necessary work as quickly as possible. The cost to have these products and services is $300.40, and can be installed next Monday. How does this sound?

Customer: Fine; however, can you bill the monthly amount with our main office bill?

Specialist: Sure that is not a problem. So, you would like the monthly billing address to be the 47th Street address?

Customer: Yes. Is there anyway the service can get installed on Friday? Our painters will be finished on Thursday and I was hoping to get the office finished this week?

Specialist: Sure. Would you prefer the morning or afternoon?

Customer: Morning would be great.

Specialist: I have set that up for you Ms. Parker. I have enjoyed serving you today and know that you will be pleased with my recommendation. Let me take a minute to give you a breakdown of the products and services you have purchased and their associated costs.

Handout Materials

[redacted]

you can . . .

PRESENT YOUR SOLUTION

BELL*SOUTH* Small Business Services

Handout III-1

Directions: Identify the products/services that could solve the typical needs of the small business customer for each core need provided.

Quadrant With Core Need	Typical Specific Needs	BellSouth Product/Service That Could Meet Need
GET THE RIGHT CALL Go to customers Many/short term	• Can't afford to miss a call • Need to respond immediately	
DON'T MISS A CALL Go to customers Few/long term	• Each contact must be handled right • Can't afford to miss an important long-term customer's call	
SPEED UP YOUR TRANSACTIONS Customers come to them Many/short term	• Credit card/check transactions do not delay sales • Not interrupted when with customer • Can't afford to miss a call needing information	
HAVE AN EFFICIENT OFFICE Customers come to them Few/long term	• Not be interrupted when with customer • Call must be handled efficiently	

Handout III-2

Directions: Determine possible benefits, values and product applications given the possible solution.

Customer 1: Ann from Efficient Office Supply
Possible Solution: MemoryCall Answering Service Plus

Product Features	Benefits, Values & Applications
Gives callers a way to leave messages. Includes 90 minutes of use per month for each mailbox. Customers page you when the message is urgent, without dialing another number. Callers have the option of being transferred to a secretary or operator.	

Customer 2: Bill from Harold's Car Parts
Possible Solution: Call Forwarding Variable

Product Features	Benefits, Values & Applications
When you want to get calls personally during normal office hours, but want MemoryCall Answering Service to take calls when you are out of the office. Can be used to forward calls to your home or any other location.	

Customer 2: Sandy Brenner from Quck Tax Preparation
Possible Solution: Three-Way Calling

Product Features	Benefits, Values & Solution
Add a third person in another location onto the existing call, even long distance. Simple operation by using Call Conferencing or Flash button or depressing hook switch.	

Handout III-3

Closing Statements

- I know this solution will solve your telecommunications needs and allow you to be even more successful in your business.

- I believe that our telecommunications products and services combined with the services you provide to your customers will help ensure your business' future success. Thank you - it was my pleasure to assist you.

- I am certain that you will soon see the value of proceeding forward with these products and services. Good luck to your continued success.

- It was a pleasure serving you today. Good luck with your business. Please call me at XXX-XXXX if you have any further needs.

- You have made an excellent choice in the products and services purchased. I'm sure you will be successful.

Handout III-4
Roleplay I Scenarios and Feedback Forms

Customer Scenario #1

Customer Profile:	You are Mrs. Williamson and are a new business owner. You have little to no knowledge of your business needs. You change your mind often and expect the Specialist to make recommendations. You become frustrated and slightly irritable midway through due to your lack of knowledge.
Customer's Name	Denise Williamson, Insurance Agent and Partner Insurance Associates
Address	1350 Waterford Way Jackson, Mississippi 60174
Phone Number	993-674-1090
Purpose of call	The purpose of your phone call is to start up your business.
Additional Information	• If asked, explain that you and your other four work colleagues do business primarily out of the office and go to your clients. • If asked, explain that you rely on long-term, repeat customers and client relations is of utmost importance to you.
Potential Objections	Depending on how effective the Specialist was during their solution recommendation, object to either some of the products/services recommended and/or object to the price.

Customer Scenario #2

Customer Profile:	You are Bonnie O'Toole and have currently moved from Arizona. You are an experienced business owner; however, you are not always knowledgeable of what you need. Consequently, you will often ask the Specialist's opinion. You are setting up a new business in Dunwoody, Georgia. You have a very friendly demeanor and tend to chatter a great deal, often changing the subject to personal matters while answering the Specialist's questions.
Customer's Name	Bonnie O'Toole, Owner Play Time Day Care Center
Address	1200 East Grand Avenue Dunwoody, Georgia 30350
Phone Number	770-654-3340
Purpose of call	The purpose of your phone call is to start up your business.
Additional Information	• If asked, explain that you and your two assistants work in the office. • If asked, explain that you rely on long-term, repeat customers.
Potential Objections	Depending on how effective the Specialist was during their solution recommendation, object to either some of the products/services recommended and/or object to the price.

Customer Scenario #3

Customer Profile:	You are Pat Seager and have lived in the area for several years. You are an experienced business owner, although it has been quite some time since you've had to establish service. You become distracted during the conversation, and ask the Specialist to "hold" for short periods of time as you help customers and often ask for questions to be repeated. You are a bit impatient and want the conversation to end as quickly as possible.
Customer's Name	Pat Seager, Store Manager Everything For A Dollar
Address	1108 Glendale Ave. Fort Lauderdale, Florida 31231
Phone Number	813-445-0937
Purpose of call	The purpose of your phone call is to start up your business.
Additional Information	• If asked, explain that you, the store owner and your two assistants work in the store. • If asked, explain that you rely on a high volume of sales.
Potential Objections	Depending on how effective the Specialist was during their solution recommendation, object to either some of the products/services recommended and/or object to the price.

Observer Feedback Form #1

Specialist Name: _____

TAKE THE LEAD

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
Acknowledged customer's request and assured that they could help			
Invited the customer to partner: • asked permission to get information • used their experience to position themselves as an expert			
Asked a transition question			

DISCOVER CUSTOMER NEEDS

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
To be developed-- consistent with Module 2 revisions			

PRESENT YOUR SOLUTION

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
Set up the solution presentation by: • confirming needs • transitioning based on needs and products to be recommended • explaining the consequences of using/not using what will be recommended			
Link recommendation to the value the customer receives			
Handle customer price objections			
Close the sale using an effective statement			

Observer Feedback Form #2

Specialist Name: _____

TAKE THE LEAD

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
Acknowledged customer's request and assured that they could help			
Invited the customer to partner: • asked permission to get information • used their experience to position themselves as an expert			
Asked a transition question			

DISCOVER CUSTOMER NEEDS

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
To be developed-- consistent with Module 2 revisions			

PRESENT YOUR SOLUTION

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
Set up the solution presentation by: • confirming needs • transitioning based on needs and products to be recommended • explaining the consequences of using/not using what will be recommended			
Link recommendation to the value the customer receives			
Handle customer price objections			
Close the sale using an effective statement			

Observer Feedback Form #3

Specialist Name: _____

TAKE THE LEAD

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
Acknowledged customer's request and assured that they could help			
Invited the customer to partner: • asked permission to get information • used their experience to position themselves as an expert			
Asked a transition question			

DISCOVER CUSTOMER NEEDS

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
To be developed--consistent with Module 2 revisions			

PRESENT YOUR SOLUTION

	Roleplay I Comments (During Training)	Roleplay II (A and B) Comments (After Training)	
Skill	How was this demonstrated?	How was this demonstrated?	How was this demonstrated?
Set up the solution presentation by: • confirming needs • transitioning based on needs and products to be recommended • explaining the consequences of using/not using what will be recommended			
Link recommendation to the value the customer receives			
Handle customer price objections			
Close the sale using an effective statement			

Lesson 4: Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Learning Advisor's Guide

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Introduction

Lesson Objectives

Upon completion of this lesson, the participants will be able to (**DISPLAY** Lesson 4, Package 1, Overhead 2):

- Demonstrate ability to deal with conflict, overcome objections/excuses and close a sale.

Audience

New Business Applications Specialists

Topics

Topic 1: Dealing With Conflict
Topic 2: Overcoming Objections/Excuses
Topic 3: Closing The Sale
Topic 4: Summary

Materials

- Learning Advisor's Guide
- Participant Handout

Equipment Required

- Overhead Projector with Halogen Light Bulb and Screen

Participant Materials

Participant Handout

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Introduction, Continued

Advance Preparation

- Review Learning Advisor's Guide and Participant Handout. Distribute a copy of Participant Handout to each participant.
- Setup overhead projector and screen
- Obtain listings from the Yellow Pages directory for use during role-plays

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Topic 1, Dealing With Conflict

Viewing Conflict Differently

SAY: You're doing great!! You've successfully completed the first three lessons which covered five of the basic Consultative Sales processes. It's time to learn how to close the sale which is the sixth Consultative Sales process **and,** is the most exciting part.

STATE: There are going to be many situations in which conflict is encountered both internally and externally. Your attitude toward it, and handling of it, can make the difference with the customer and your peers.

ASK participants what their definition of conflict is and **BOARD** their responses. **HAVE** participants identify situations when conflict arose and have them identify certain words to describe. **BOARD** the words.

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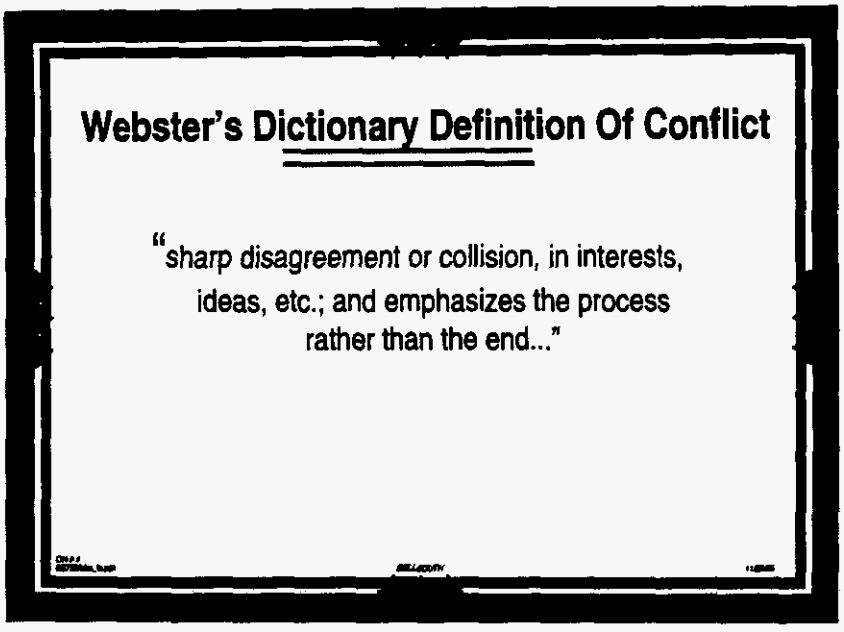
Topic 1, Dealing With Conflict, Continued

Viewing Conflict Differently (continued)

DIRECT participants' attention to Lesson 4, Package 1, Overhead 3

STATE: Webster's New World Dictionary's definition of conflict is:



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Topic 1, Dealing With Conflict, Continued

Viewing Conflict Differently (continued)

SAY: The following information will help us understand and deal with conflict.

It is **important** that when conflict is encountered:

- Do not become defensive
- Understand that it's not personal - it's business

Viewing Conflict Differently

Conflict Can Be Managed:

Conflict occurs when people's needs are not being met. Conflict is an inevitable part of life and is not always easy to deal with.

Many people avoid conflict for fear of things getting out of control.

However, it is possible to have more control over the outcomes of conflict. You can do this by considering the needs of everyone involved, and aiming for cooperation and mutual gain.

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Topic 1, Dealing With Conflict, Continued

Clues To Conflict

SAY: To resolve a conflict, you must first recognize that it exists. Like any good detective story the clues to conflict are there for you to discover. Conflict clues include: crisis, discomfort, specific incidents, misunderstanding, and tension.

Crisis:

A crisis is an obvious indication that you are in conflict and usually occurs when a situation is left unresolved too long. During a crisis people become overwhelmed by their feelings. Extreme actions are contemplated and sometimes carried out.

Discomfort:

Discomfort is a subtle clue. It is the intuitive feeling that something is wrong, even though you can't exactly identify what it is.

Specific Incidents:

Specific incidents are minor events that leave you feeling upset or irritated. Incidents usually mean that one party is annoyed and the other unaware that there is a problem.

Misunderstandings:

Misunderstandings occur when people make false assumptions about a situation, usually because of unclear communication. In a misunderstanding people have different views of a situation and see the problem in a distorted way.

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Topic 1, Dealing With Conflict, Continued

Clues To Conflict (continued)

Tension:

Tension distorts the way people see each other and often follows a misunderstanding or incident. When tension occurs communication becomes weighed down with negative attitudes and fixed opinions.

Look For The Clues:

Being aware of the early signs of conflict is a crucial skill. It can prevent people from damaging relationships by saying hurtful things that are not easily forgotten.

ASK participants' to take just a moment to think back to a time when they encountered conflict - it could be a business or personal situation. **ASK** participants' to write the conflict situation on a piece of paper and to list the ways they felt they benefited or changed as a result of the conflict. **ALLOW** at least 15 minutes for completion .

SAY: Think about the situation that you wrote down. Did you have a clue that there was a conflict? **ASK** if a participant has a situation that they could share with the class.

SAY: The purpose of this exercise was to get you to think about conflict and its effects.

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Topic 1, Dealing With Conflict, Continued

Choosing Your Approach

SAY: Let's look at some ways that we can approach conflict.

Approaches To Conflict:

Most people use the same approach to conflict no matter what the occasion. If your response to conflict is inappropriate, it can prevent you from handling the situation effectively.

But just like choosing the appropriate clothes to wear for different situations, you can choose an appropriate approach to conflict.

There are a number of approaches to conflict:

- **Withdrawal** - Withdrawal involves walking away from a difficult situation. It's wise to withdraw from a conflict if it is none of your business.

- **Suppression** - Suppression is refusing to acknowledge conflict. There may be times when it is preferable to do this. For example, if you believe someone is not yet ready to hear what you have to say.

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Topic 1, Dealing With Conflict, Continued

Choosing Your Approach (continued)

- **Win/Lose** - Win/lose is a power struggle where one party wins at the expense of the other. This approach is necessary when people need protection from violent or rash behavior.

- **Compromise** - Compromise uses negotiation skills and aims to divide things as fairly as possible. The danger of compromise is that you sometimes bypass more creative solutions that better meet needs.

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Topic 1, Dealing With Conflict, Continued

Win/Win Approach To Conflict

SAY: However, there is one approach to conflict that is suitable for most occasions - the Win/Win approach.

- **Win/Win: The Best Approach** -

- It takes the needs of all parties into account

- It's about cooperation and becoming partners in resolution rather than opponents

- It's concerned with finding solutions that are fair to everybody concerned

- It's about you and me rather than about you or me

- **Everyone Can Win** - It is commonly believed that if there's a winner there must be a loser. But in many cases everyone can win something.

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Topic 1, Dealing With Conflict, Continued

Win/Win Approach To Conflict (continued)

Steps To Win - When problems confront us we look for instant solutions - sometimes far too quickly. The win/win approach requires us to find out what's involved first before settling on a final solution.

The steps of the win/win approach are:

1. Find out what each party needs and why they need it
2. Look for creative solutions that meet as many needs as possible
3. *Cooperate* - work as partners rather than opponents - because when both people win, both are committed to the solution

Start With A Win/Win Attitude - Starting with a win/win approach increases your chances of creating a win/win outcome.

DIVIDE participants into teams and **PROVIDE** them with a copy of Lesson 4, Exercise 1. **INSTRUCT** participants to use what they've learned so far and write a win/win solution for the situation provided. **TELL** the participants to select one of their team members to present their solution to the class. **ALLOW** participants 15 minutes to complete.

Upon completion of the exercise, have each team present their solution for the situation given. **CONTINUE** until all team win/win situations have been covered. Draw upon your knowledge to ensure that the Consultative Sales process steps have been included in the resolutions. **ALLOW** at least 20 minutes for completion.

ASK: What questions do you have about the exercise that we've just completed?

ANSWER questions drawing upon your own knowledge

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Topic 1, Dealing With Conflict, Continued

Response To Conflict

Review:

Creative Response To Conflict:

The creative response to conflict is a process of developing a win/win attitude. This response asks you to consciously direct the conflict to the positive, extract the best from each situation, and look for what can be gained from the situation.

The RAFT Response:

The RAFT creative response to conflict has four steps:

1. **Respond** rather than react to a situation
2. **Accept** the situation for exactly what it is - no more and no less
3. **Find** something **positive** to learn from the situation
4. **Transform** your conflict into an opportunity

React:

If you react directly from your feelings you'll often make a difficult situation worse. To react is to behave impulsively and lose control. When we react we usually believe that someone else is the cause of our behavior. Reacting doesn't get us very far in the conflict resolution process.

Choose To Respond:

At first it seems that the easiest path is to react, but that usually leads nowhere. If you choose to respond, it may take a little longer to stop and prepare your thoughts, but in the end you are more likely to arrive at a win/win outcome.

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Topic 1, Dealing With Conflict, Continued

Response To Conflict (continued)

What Does 'To Respond' Mean?

To respond means to behave thoughtfully. When you respond you feel in command of a situation rather than swept away by it.

One way of responding is to move quickly into a win/win approach.

By responding you set the tone of conversation.

Accept The Situation:

To change a situation don't start by focusing on an ideal, start by accepting the situation for what it is, and then think of what you would like to change.

To Accept is the second step in the RAFT creative response to conflict.

Find The Learning Experience:

The creative response to conflict finds a way to see each conflict as a positive learning experience.

To find is the third step in the RAFT creative response.

Thomas Edison failed over 10,000 times before producing a working light bulb. When asked how he could persist he replied: ***"I did not fail 9,999 times. I succeeded 9,999 times in learning how not to make a light bulb."***

Learning involves choosing to see things as an interesting experiment. This makes it much easier to admit when you make a mistake.

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Topic 1, Dealing With Conflict, Continued

Response To Conflict (continued)

Winning And Learning:

Mistakes are an important part of the learning process. Life doesn't have to be about winning or losing - it can be about winning and learning.

The Reticular Activating System:

You can program your brain to change your behavior. The Reticular Activating System (RAS) is an area of the brain responsible for selecting what you notice and what you don't. If your attention is constantly drawn to mistakes and problems you end up programming your RAS to notice only the down side of things.

Have A Positive Attitude:

Our attitude and behavior influence the way other people see us. We can start to transform conflicts into opportunities by approaching them in a positive way. When we do this other people are usually more willing to deal with the conflict, which in turn makes the whole resolution process easier.

Envisage A Positive Outcome:

Instead of thinking about the likely outcome of a particular event, visualize what you would like it to be. Turn this visualization into affirmations. Positive affirmations are a useful tool for resolving conflict.

But remember, just as positive self-talk can affect the outcome of a conflict, so can negative affirmations. Negative affirmations pop up in chance remarks and statements of hopelessness and helplessness and distance us from a win/win approach.

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Topic 1, Dealing With Conflict, Continued

Communicating Effectively

SAY: You've already been taught in previous lessons how to effectively communicate with the customer through active listening, and how to establish rapport and credibility. Let's now take a look at how we can be assertive in an appropriate way.

Fight And Flight:

The two typical human reactions to conflict are fight and flight.

Fight - A fight reaction is an aggressive approach. People who use this approach attack first and ask questions later. A fight reaction is usually followed by hostility, anger, self-righteousness, guilt, and relationship breakdown.

Flight - In contrast, flight is a passive approach. In a flight reaction, people stifle their own rights and needs. The payoff of a flight reaction is that it avoids an unpleasant situation. But the consequences of flight include anxiety, disappointment, resentment, and anger because your needs are not being met.

Appropriate Assertiveness:

During conflict, appropriate assertiveness is about stating your case without arousing the defenses of the other person. This response is likely to generate a positive outcome.

Assertive statements let you make a clean, clear statement about the conflict without leveling shame or blame.

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Topic 1, Dealing With Conflict, Continued

Communicating Effectively (continued)

Assertive Statements:

1. Stating the issue objectively
2. Stating how you feel about it, without blaming the other person or being insulting
3. Stating what you'd like
4. Getting the other person's agreement

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Topic 1, Dealing With Conflict, Continued

Communicating Effectively (continued)

DIVIDE participants into equal teams. Using Lesson 4, Exercises 2-5 assign each team a scenario. **ASK** participants to brainstorm and come up with a proposal that will solve their customer's needs/concerns. **REMIND** participants to use their knowledge of products and services and the customer's operating environment in development of their solution. Have each team present their solution to the class and explain how their proposed solution will meet/exceed their customers needs/expectations.

PURPOSE: To allow participants the opportunity to practice all of the Consultative Sales skills learned in this course.

SAY: This completes our review of "Dealing With Conflict" which better prepares us to address the customer's objections and/or excuses and close the sale which is our last Consultative Sales process.

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Topic 2, Overcoming Objections/Excuses

How To Overcome Objections/ Excuses

SAY: Let's take a look at clarifying the objection or excuse. Think back to what you've just been taught about "Dealing With Conflict" as we continue with our training.

How To Overcome Objections:

Your customer may raise objections/excuses during your presentation and/or immediately after you try to close the sale. It is best to address an objection/excuse when the customer raises it. Even if you haven't finished your recommendation, go ahead and address the objection/excuse so that your customer isn't thinking about it instead.

Don't be surprised if your customer has more than one objection/excuse. Just handle each objection/excuse one at a time. Be confident and remember that you are just helping the customer to understand how your recommendation will help them. It is your job, as their "business consultant," to show that your recommendation is the right solution!

EXERCISE: **ASK** participants to define "Overcoming Objections"

BOARD their responses

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Topic 2, Overcoming Objections/Excuses, Continued

How To Overcome Objections/ Excuses (continued)

DISPLAY Lesson 4, Package 2, Overhead 2 and **DISCUSS**:

There are six basic steps to overcoming objections/excuses. They are:

- Clarify the objection/excuse
- Mirror + paraphrase
- Re-paint the picture
- Answer the objection/excuse
- Confirm that the objection/excuse was handled
- Ask for acceptance of the value proposition

STATE: If you gained agreement during the needs assessment and value proposition stage, you can re-paint using the customer's exact response

Clarifying/ Answering The Objection/ Excuse

STATE: The first step of overcoming an objection/excuse is to be sure that you understand the objection/excuse. Many objections/excuses are simply the result of a misunderstanding. Many sales people "paint themselves into a corner" by responding to what they think is the customer's objection/excuse, only to end up raising issues that the customer hadn't even considered. Be sure you know what the objection/excuse is before you address it.

Some examples of clarifying remarks are:

- If I understand you correctly, you are concerned about _____ (repeat the customer's stated concern) of Call Forwarding. What benefits do you see? What seems to be easy for you to use?
- You have told me that you are concerned about ____ of an additional line. Is that correct? What benefits do you see in an additional line?

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Topic 2, Overcoming Objections/Excuses, Continued

Clarifying/ Answering The Objection/ Excuse (continued)

Don't ever assume that you know what the objection/excuse is. Clarify to be sure.

STATE: It is important that you empathize with your customer's objection/excuse. You can show that you are not just there to sell them something, but rather you are there to help them. Empathizing is part of building your credibility as someone who is interested in helping them achieve their goals. Empathizing also shows that you were listening and really care about their issues.

The key to empathizing when the customer has misinformation is to acknowledge the customer's opinion without agreeing with it!

Let's look at some examples:

- "What benefits do you see with Call Forwarding?" Let me explain just how easy this service operates."
- "You make an interesting point. Let me share some additional information with you."

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Topic 2, Overcoming Objections/Excuses, Continued

Clarifying/ Answering The Objection/ Excuse (continued)

STATE: There are several ways that you can answer an objection/excuse. The approach you take will depend on the type of objection/excuse the customer raises.

If the customer raises an objection/excuse after you have made a close, one of the first things you want to do is get their agreement that if you overcome this objection/excuse, then they will accept your recommendation. The approach basically says, if I can overcome their objection/excuse, they will most likely buy. You get the customer's agreement first, then you overcome the objection/excuse. You only use this technique in situations where you know, up-front, that you have a good chance of overcoming the objection/excuse.

Example:

Customer:

"An additional line costs too much. I'm on a limited budget and I can't afford that much money."

NOTE: The customer has not objected to the service. Whenever possible, allow the customer to tie in their own customer worth vs. the investment. If the customer does this, they have sold themselves.

Business Applications Specialist:

"I can understand that. How do you see an additional line bringing in new business and helping to pay for itself?"

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Topic 2, Overcoming Objections/Excuses, Continued

Confirm That The Objection Was Handled

STATE: Be sure that you have removed all obstacles to your recommendation. You want your customer to be open to saying "yes." You may want to say something like:

"What other questions do you have about the service?"

Remember, just handle the questions one at a time. If you get another objection/excuse, just start again by clarifying it and following the rest of the steps.

Asking For Acceptance Of The Value Proposition

STATE: The whole reason that you are overcoming objections/excuses is so that you can answer the customer's questions and remove any barrier to them accepting your value proposition. Once you have removed those barriers, you need to ask them, again, to accept your recommendation.

Examples:

- "Now that you see the benefits of the service, let me go ahead and place an order for you."
- "I can arrange to have this service installed by next Wednesday, how does that sound?"

SAY: Let's take a look at some of the commonly heard objections/excuses and suggested ways to overcome them.

REFER participants to their Participant Handout

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Topic 2, Overcoming Objections/Excuses, Continued

Commonly Heard Objections/ Excuses (continued)

DISPLAY Lesson 4, Package 2, Overheads 3-9 one at a time. **STATE:** Here are some commonly heard objections/excuses and a response for each one. (**REVIEW** bullets one at a time keeping succeeding bullets covered up.)

ASK participants to provide common objections/excuses that they've heard

BOARD their responses

EXPECT:

- Have to check with....
- Cost too much
- Don't need it
- Don't have time
- My equipment does it
- Won't use it
- Too complicated

Let me think about it:

- What questions do you have?
- What are your thoughts?
- What can I clarify?
- What is it you're sure about?

I need to check with...

- What questions might he/she have?
- What part do you need to verify with him/her?
- What is it that you feel he/she would like?

I don't know:

- What haven't I answered?
- Tell me what appeals to you most?

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Topic 2, Overcoming Objections/Excuses, Continued

Commonly Heard *Objections/* Excuses

Maybe later, not now:

- How will it benefit you to wait?
- What benefits do you see in getting the service now? later?

It costs too much, not in the budget:

- How could some of these services save you money?
- How much does one lost customer cost you?

Sounds Too Complicated:

- What part of the service seems easy to you?
- What benefits do you foresee?
- How would it help if I called you on the day we connect the service?

My equipment does everything:

- How would you feel if we could enhance your equipment?
- Tell me what your equipment does.

USING Lesson 4, Exercises 6-9 role-play with participants to resolve the customer conflict as you present it.

SAY: This completes overcoming objections/excuses and leads us into our last Consultative Sales process - "closing the sale." However, let's first take a short break.

ALLOW participants' a 15 minute break before continuing with the next topic.

DEBRIEF the exercise through discussion and feedback from participants.

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Topic 3, Closing The Sale

Introduction

EXERCISE: ASK participants to give examples of how they would close a sale.

STATE: This is the part of the call that is critical to your success as a Business Applications Specialist. **DISPLAY** Lesson 4, Package 2, Overheads 10-11 and **DISCUSS**.

- Learn to identify and act on buying signals.
- Remember the golden rule of closing - close early and often! Use trial closes through your sales call to prepare for the final close.
- Summarize the advantages (value) your customer will receive with a yes decision.
- Use a powerful closing statement.
- ASK FOR THE ORDER! This is the most frequently skipped part of a sales call. Under no conditions should you hesitate to ask your customer to make a buying decision.
- After asking for the order...Silence! Let the customer speak next.

SAY: Now let's take a look at some additional information that will help you with the sales process.

Let's take a look at customer buying signals. These are subtle signals that the customer may give you to indicate that he/she is ready to go ahead with your recommendation.

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Topic 3, Closing The Sale, Continued

Recognizing Buying Signals (continued)

EXERCISE: ASK participants how they could recognize buying signals.

BOARD their responses

REFER participants to the topic "Recognizing Buying Signals" in their Participant Handout and **DISCUSS.**

DISPLAY Lesson 4, Package 2, Overheads 12-15 and **DISCUSS**. The following are buying signals that you should respond to by attempting a trial close.

- **Silence** - The customer's silence may be telling you that you have answered all his/her questions and he/she is ready to say "yes."
- **Installation/Due Date Questions** - Questions like "How long does it take to get installed" tells you that your customer may have made a decision to buy and is moving on to implementing that purchase.
- **Reference Of Ownership** - Comments like "I could really use that service with the job I'm starting next week." Your customer is telling you that your product will help him/her. Confirm his/her feeling by asking for the sale.
- **Yes, I'll take it.**
- **Small Details** - When your customer starts talking about small details concerning your service, he/she may be ready to say yes.

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Topic 3, Closing The Sale, Continued

Video

Show video "Problem Management"

Asking For And Closing The Sale

REFER participants to the topic "Asking For And Closing The Sale" in their Participant Handout and **DISCUSS:**

Effective Closing Statements:

STATE: Alternative Close is giving the customer a choice.

Here are several phrases that you can use in attempting to bring a customer closer to a "yes" decision. **DISPLAY** Lesson 4, Lesson 2, Overheads 16-17 and **DISCUSS**:

- How does that sound to you?
- We can have that service installed for you in just 5 days, how does that sound?
- I can write the order for you now, when would you like the service installed?
- I can process your order now and we can have your service installed by the end of the week.
- What other questions do you have that I have not answered?
- **MOST IMPORTANT** - Don't let the customer hang up without asking for a buying decision.

STATE: Do not oversell - be quiet after the customer says yes.

LEARNING ADVISOR NOTE: Remember to stress full disclosure compliance!

SAY: Now let's take a closer look at asking for and closing the sale.

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Topic 3, Closing The Sale, Continued

Asking For And Closing The Sale (continued)

ASK: Why Don't Some Sales People Like To Close?

Probably the single biggest reason that sales people don't like to close is that they fear rejection. Some sales people take the rejection personally. Other sales people don't like to close because they feel like they are being "pushy" when they ask a customer to buy.

You really haven't done your job of helping your customer meet his/her business goals and needs until you have convinced them to accept your recommendation. Let's look at some things you can do to improve the chance that your customer will say "yes" to your recommendation.

When a customer is ready to buy, the following reasons are why they're buying. **DISPLAY** Lesson 4, Package 2, Overheads 18-19 and **DISCUSS**:

- New comers to area
- Emergency buyers
- Dissatisfied customers
- Infrequent buyers
- Comparative shoppers

What makes them choose?

- Reliability
- Authorized Sales
- Service
- Completeness of line
- Illustrations or logos
- Location

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Topic 3, Closing The Sale, Continued

Asking For And Closing The Sale (continued)

EXERCISE: **ASK** participants to identify the components of a successful close

BOARD their responses

DISCUSS: Components Of A Successful Close:

You make a close when you request that your customer accept your recommendation. A successful close occurs when the customer does accept your recommendation. Closing becomes easy when the following components are present. **DISPLAY** Lesson 4, Lesson 2, Overheads 21-25 and **DISCUSS**

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Topic 3, Closing The Sale, Continued

Asking For And Closing The Sale (continued)

Preparation:

- Preparation should include a knowledge of your customer's goals and needs, and customer's customer, who and why will they choose the business. It also includes a knowledge of the services you recommend and how they will help your customer's business. You should also be prepared for possible objections/excuses and know how to overcome them.

Your Attitude:

- You must project an enthusiastic and professional mannerism. You enjoy helping your customers become more profitable.

Your Confidence:

- You must have confidence in yourself and express that through your tone of voice. You will be helping your customer improve his/her business. Don't apologize for the cost of your recommendation, as long as it meets your customer's needs.

The Customer's Confidence:

- Your customer will be ready to buy if he/she agrees that a change is needed and you present the best way to make that change.

The Customer's Authority To Commit:

- The person you are making your recommendation to must have the authority to make the decision to accept your recommendation.

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Topic 3, Closing The Sale, Continued

Integrity-Full Disclosure

LEARNING ADVISOR NOTE: DISCUSS and stress the importance of BellSouth's Full Disclosure Statements for Optional Services. (Also located in the Participant Handout.)

EXPLAIN: The following policy was put in place to ensure that all BellSouth customers are aware of exactly what services are being put on their account and how much it costs.

Since we do not require a signed agreement to place an order it is of the utmost importance that customers understand exactly what they are buying, how much it will cost, and the optional nature of the service.

Strict compliance with this policy is required.

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Topic 3, Closing The Sale, Continued

Integrity-Full Disclosure (continued)

DISPLAY Lesson 4, Package 2, Overheads 26-28 and **DISCUSS**. **All customer contact personnel MUST:**

- Clearly communicate to customers the optional nature of each optional service that is recommended or sold.
- Provide a clear description of each optional service that is recommended or sold.
- Provide the rate charged for each optional service recommended or sold.
- Make sure the customer understands that optional services are not required to obtain basic telephone service.
- Make sure the customer understands that optional services can be canceled at any time without a cancellation charge.
- (SERVICE PLANS ONLY) Advise the customer that there are exclusions which will be detailed on the first bill. Cover the exclusions if requested by the customer.

These procedures apply in addition to any requirements mandated in your state.

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Topic 3, Closing The Sale, Continued

Common Mistakes

ASK participants: "What are some common mistakes that you think a specialist makes when closing the sale with a customer?"

BOARD their responses

DIRECT participants to Lesson 4, Package 2, Overheads 29-32 and discuss:

Common Mistakes You Should Avoid!

- Not talking to the decision maker. All too often, a salesperson will talk to the first person that listens. Save yourself a lot of time and frustration! Talk to the right person

- Selling products instead of value. Spell out to your customer how your service will add value to their business. Do not sell the products, sell the value (features and benefits).

- Not asking for the sale. It's hard to believe that this happens so frequently, but it does. Do not let a customer hang up without asking for a buying decision.

- Talking too much. Make a solid presentation, handle the objections/excuses, and ask for the sale. Once you ask for the sale, remain silent and let the customer have the next word. Once the customer has agreed to buy go right into your call wrap-up. Do not continue to sell the service! Also, don't talk past the sale.

- Announcing instead of selling. Don't do a product knowledge "data dump" on your customer. Instead translate your service into value the customer will benefit from. Do not expect the customer to translate your service offering into value - that's your job!

- High pressure selling instead of Consultative Sales. This approach may have worked in the old days, but it is not a successful approach for today's customers. Using creative Consultative Sales processes/skills will ensure much better results over the long run.

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Topic 4, Summary

Completion

SAY: We are now going to practice using all of the Consultative Sales processes that you have learned in this course.

PROVIDE a copy of Lesson 4, Exercise 10, Summary to each participant. Have each participant complete the exercise as directed.

EXPLAIN:

- Each participant is to develop a specialist/customer scenario using all six basic Consultative Sales processes (including full disclosure) that have been taught in this course.
- They are to work individually and there should be no talking during the exercise.
- They are allowed to use any notes, job/training aids, etc.
- They will be expected to present their scenario to the class and explain how they incorporated each sales process.

ALLOW participants one hour to complete the exercise

ALLOW participants a break. Upon return, **TELL** participants that the next couple of hours will be spent practicing the use of the consultative sales skills and order negotiation skills that they have learned.

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Topic 4, Summary

Completion

USING listings from your local Yellow Pages directory, role-play with participants. **ASSIGN** one participant the responsibility of role-playing as the specialist, however, ask all participants to practice inputting the service order as if they too were negotiating the order with you. **TELL PARTICIPANTS - DO NOT GEN** the orders. Upon completion of each role-play, review each participant's service order input and provide feedback as appropriate. **DISCUSS** the negotiation with the class to obtain any additional input that might have assisted in the sales contact.

When this exercise has been completed....**Congratulate** the participants on their successful completion of the Consultative Sales training course.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Dealing With Conflict, Exercise 1

Situation:

As a new specialist you encounter conflict with your customer, Ms. Gish, when the system goes down and you're unable to provide her with a telephone number and due date for her new service.

What can you do to ensure that this situation is handled successfully? Write your win/win proposal in the space provided below.

What products/services will you offer that will meet her business needs.

Win/Win Proposal:

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 2, Customer Scenario

Industry: Healthcare

Situation:

The customer, Mrs. Niarchos with Eastside Medical Laboratories calls into the business office and provides the following information:

1) The nurse in the lab needs the ability to page the receptionist in the front office to obtain customer information.
2) We need the ability to fax information to doctors' offices.
3) We frequently call specific numbers i.e., emergency room hotlines.

What products/services will you offer that will meet her business needs.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 3, Customer Scenario

Industry: Retail

Situation:

Mr. Grant with G-Mart Clothing Stores calls into the business office and provides the following information.

1) It's the holiday season and shoppers will be calling to check availability of products being sold. I don't want my customers getting a busy signal.

What products/services will you offer that will meet his business needs.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 4, Customer Scenario

Industry: Legal

Mr. Rudolph with Rudolph Attorneys at Law calls the business office and provides the following information:

1) There are three attorneys in this office and we need:

   a) the ability to recognize clients calls.
   b) to log incoming calls
   c) ability to have one person take all of our messages and distribute them appropriately

What products/services will you offer that will meet his business needs.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 5, Customer Scenario

Industry: Insurance

Dennis Wardlow with Oconee Realty calls into the business office and provides the following information:

1) We want to provide a local number for our Atlanta Metro clients to call.
2) We don't want to lose any calls.

What products/services will you offer that will meet his business needs.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 6

Customer Information:

- new business
- the customer has a roommate
- they operate a small dress boutique on the lower level of their apartment
- they sometimes work from the apartment
- one of them may be in the boutique while the other one is in the apartment

Customer Objection: We can't afford it.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 7

Customer Information:

- Customer moving to a new address and is experiencing problems with the builder
- the customer is self-employed
- business is a small grocery store
- has a husband and 12 year old grandson
- majority of time is spent at the grocery store
- children are all adult living in various areas of the United States
- sometimes do paperwork at home
- 50th anniversary

Customer Objection: All the new fangled services that are out are just too complicated to understand. We just want something that's plain and simple to use.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Overcoming Objections/Excuses, Exercise 8

Customer Information:

- customer is a sales consultant
- moving to a larger house
- has a wife, 3 year old son, twin daughters (9 months)
- both husband and wife work out of the home
- Mrs. is a free lance interior decorator
- has a live in maid

Customer Objection: Before I can accept any special services, I have to discuss it with my wife. The only thing we need right now is service connected in our new home before Friday of this week.

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Topic 2, Overcoming Objections/Excuses, Exercise 9

Customer Information:

- customer is Marketing Manager at IBM
- getting married and moving from singles complex to sub-division
- will have a bedroom that ill be reserved for guests
- customer and bride to be are members in several professional organizations and entertain frequently
- travel often

Customer Objection: I don't think I need an additional line. What other ideas do you have?

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Dealing With Conflict, Addressing Objections/Excuses, And Closing The Sale

Lesson 4, Topic 4, Summary

Exercise 10

You are to develop a Specialist/Customer scenario using the six basic Consultative Sales processes that you have been taught in this course. Your customer's information follows:

FACTS:

- Customer: Chris Isanti
- New business name: Isanti Real Estate Co.
- Industry type: Real Estate
- Type of customer need: Results
- Customer is open to recommendations and will present no conflict.

NOTE: Remember to include "Integrity-Full Disclosure" in your scenario.

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FIVE BASIC STEPS TO OVERCOMING OBJECTIONS/EXCUSES JOB AID

- Clarify the objection/excuse
- Mirror + paraphrase
- Re-paint the picture
- Answer the objection/excuse
- Confirm that the objection/excuse was handled
- Ask for acceptance of the value proposition

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COMMONLY HEARD OBJECTIONS/EXCUSES JOB AID

Let me think about it: - What questions do you have? - What are your thoughts? - What can I clarify? - What is it you're sure about?	**I need to check with....** - What questions might he/she have? - What part do you need to verify with him/her? - What is it that you feel he/she would like?
I don't know: - What haven't I answered? - Tell me what appeals to you most?	**Maybe later, not now:** - How will it benefit you wait? - What benefits do you see in getting the service now? later?
It costs too much, not in the budget: - How could some of these services save you money? - How much does one lost customer cost you?	**Sounds too complicated:** - What part of the service seems easy to you? - What benefits do you foresee? - How would it help if I called you on the day we connect the service?
My equipment does everything: - How would you feel if we could enhance your equipment? - Tell me what your equipment does.	

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CLOSING THE SALE JOB AID

- **Learn to identify and act on buying signals**
- **Remember the golden rule of closing - close early and often!**
- **Use trial closes through your sales call to prepare for the final close.**
- **Summarize the advantages (value) your customer will receive with a yes decision.**
- **Use a powerful closing statement**
- **ASK FOR THE ORDER! This is the most frequently skipped part of a sales call. Under no conditions should you hesitate to ask your customer to make a buying decision.**
- **After asking for the order...Silence! Let the customer speak next.**

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RECOGNIZING BUYING SIGNALS JOB AID

- **Silence** - The customer's silence may be telling you that you have answered all his/her questions and he/she is ready to say "yes."

- **Installation/Due Date Questions** - Questions like "How long does it take to get installed" tells you that your customer may have made a decision to buy and is moving on to implementing that purchase

- **Reference Of Ownership** - Comments like "I could really use that service with the job I'm starting next week." Your customer is telling you that your product will help him/her. Confirm his/her feeling by asking for the sale

- **Yes, I'll take it**

- **Small Details** - When your customer starts talking about small details concerning your service, he/she may be ready to say yes.

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COMPONENTS OF A SUCCESSFUL CLOSE JOB AID

- **Preparation** should include a knowledge of your customer's goals and needs, and customer's customer, who and why will they choose the business. It also includes a knowledge of the services you recommend and how they will help your customer's business. You should also be prepared for possible objections/excuses and know how to overcome them.

- **Your Attitude:** You must project an enthusiastic and professional mannerism. You enjoy helping your customers become more profitable

- **Your Confidence:** You must have confidence in yourself and express that through your tone of voice. You will be helping your customer improve his/her business. Don't apologize for the cost of your recommendation, as long as it meets your customer's needs.

- **The Customer's Confidence:** Your customer will be ready to buy if he/she agrees that a change is needed and you present the best way to make that change.

- **The Customer's Authority To Commit:** The person you are making your recommendation to must have the authority to make the decision to accept your recommendation.

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Lesson 6: Q.U.A.R. Methodology: Taking Action - Lead Generation

Learning Advisor Guide

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Taking Action - Lead Generation

Overview

Purpose

Improve customer satisfaction and create loyalty by developing guidelines for creating a lead versus finalizing a sale.

Objective

To obtain leads, the Customer Support Specialist identifies customer telephone **NEEDS** through general phrases and open-ended questions without intentionally targeting or naming a product.

ADVANTAGES:

- Improves customer satisfaction
- Improves access
- Increases revenue
- Keeps customer open-minded
- Prevents oversell/ overkill/ double talk
- Increases consultative selling power by both CSS and BAS specialists

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What is a Lead?

Definition of Lead Generation

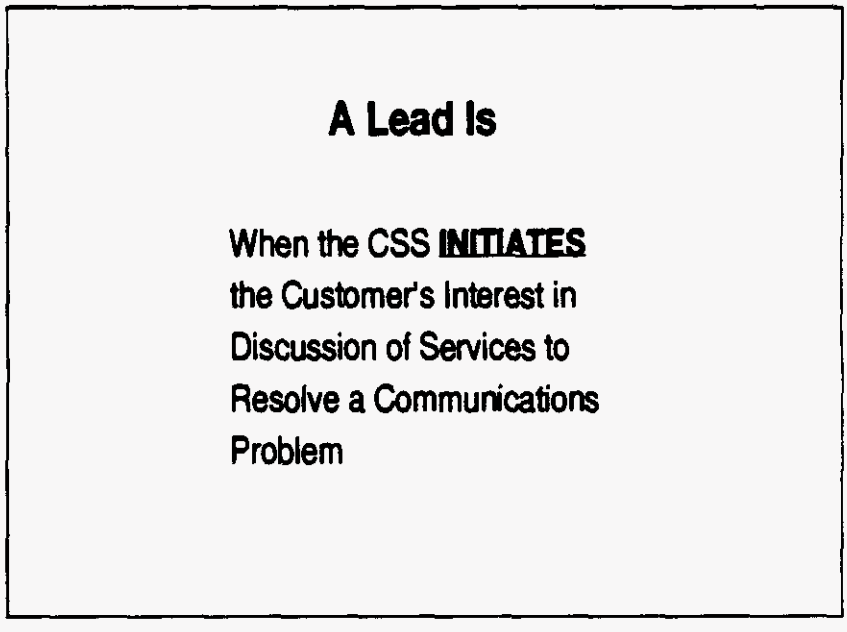
ASK participants for the definition of a lead?

LEAD the conversation to:

- A lead can solve a customer's problem
- A lead can be generated for a service or product unrelated to the original problem but uncovered during the process of problem management

EXPLAIN that, while the focus of this lesson is on generating a lead to resolve a problem, the CSS job responsibilities is to always be a Telecommunications Consultant. Remind participant's that a significant portion of the performance appraisal is based upon lead generation.

INTRODUCE slide and instruct participants to repeat text on slide in unison.



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DEMONSTRATING OWNERSHIP

STATE: Think back to a time when you might have been talking with a clerk/reservation agent and your problem was not completely resolved, or was 'pushed' on to someone else. <pause>

REQUEST a few volunteers to share their experiences.

ASK: How did this make you feel? What was your impression of the company when this happened?

NOTE. *- Provide an example of your own when you experienced this. You may also want to use the example below:*

A consumer purchased a computer directly from the manufacturer over the phone. It was shipped within 2 weeks. However, whenever the consumer tried calling the helpline they were put on hold... sometimes for as long as an hour! Often times when they finally did reach someone, they were informed that they were not the right group of people to solve their problem. The consumer got comments such as "you need to call another number, sounds like you're having a software problem, and we primarily take care of hardware problems." This happened so often that the consumer ended up returning the computer and having his credit card credit him the money. He has told this story to many individuals (bad news travels fast!), and vows to never consider using this company again.

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STATE: I'd like us to now hear a real-life call, taken from Action Line, which explains how one Shreveport Customer Support Specialist demonstrated superb ownership of a customer problem.

REFER participants to the Action Line Message in their Specialist's Guide.

REQUEST two volunteers to read the message aloud to the rest of the group:

- One volunteer should read the part of Shirley Coutee.
- The other volunteer should read the part of Glenn Kesee.

DEBRIEF by asking:

- How did Shirley demonstrate ownership in that situation?
- What were the ramifications of her actions?

Transition: We have just discussed why taking ownership is important and how to demonstrate it. We are now going to discuss how to create partnering relationships.

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ASK: What is the likely outcome if you do not partner with the customer?

Suggested responses:

- *Could be a negative experience for the customer.*
- *The image of BellSouth Small Business can be blemished.*
- *Customer may not feel we are capable of handling their requests/problems in the future.*
- *Low score on Customer Satisfaction Survey.*

ASK: What is the likely outcome if you do partner with the customer?

Suggested responses:

- *Will be a positive experience for the customer.*
- *The image created for BellSouth Small Business is that of professional, helpful and friendly.*
- *Helps BellSouth emerge as a Service Leader.*

STATE: We deal with many types of customers every day. Each customer has a 'state of mind' or a frame of reference when they call us. Psychologists have identified four basic states of mind that a customer is likely to be in when you initiate contact and partner with the customer.

PRESENT the four states of mind:

- Insistent
- Indecisive
- Angry
- Complacent

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ASK: So you have just answered a call from a customer. The customer is somewhat insulting, argumentative and intimidating to you regarding his excessive phone bill last month. How do you create a partnership with this customer - what are some strategies to building a partnership with these types of customers?

BOARD all responses.

Suggested responses:

- *Validation and acknowledgment that the customer's problem is important.*
- *Express regret as necessary.*
- *Don't get defensive - the anger is not directed at the Specialist.*
- *Demonstrate professionalism in tone of voice.*

TRANSITION to Creating a Partnership Relationship Audio tape Activity.

INTRODUCE the activity:

- Two audio tape samples of calls will be played.
- After each call Specialists will take a few minutes to reflect on the strengths and areas for growth of each call.
- Debrief will occur after both calls have been heard

***NOTE:** Audio tape Sample #1 is a non-example of creating a partnership with an angry customer. Audio tape Sample #2 is a best case example of creating a partnership with an angry customer.*

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Audio Sample 2: Good Example

Specialist: Good morning, this is Becky Tyler with BellSouth. (in a warm, friendly manner)

Customer: This is Carl Wier with Wier Tax Preparation Service. (in a short, snappy tone.

Specialist: Yes Mr. Wier, what can I do for you today? (professionally)

Customer: This is the second time I have had to call and change my billing address! I don't see why you can't get it right the first time?!!

Specialist: Oh! I understand your problem. I know how aggravating something like that can be. I can handle your request. First, can I get your phone number so I can verify the address we have on record Mr. Wier?

Customer: Yes, it is 904-894-5569.

Specialist: Okay, let's see, I have the record showing as 393 Seventh Avenue, Suite 201, Birmingham, Alabama 23392. Is that correct?

Customer: No! It is 396 Seventh Ave.

Specialist: Oh! It was a typo. Mr. Wier I have gone ahead and made the correction. Sorry for any inconvenience this may have caused you. Your next bill will be sent to 396 Seventh Ave.

Customer: All right, good. (In a better tone than earlier)

Specialist: Mr. Wier, is there anything else I can help you with today?

Customer: I can't think of anything.

Specialist: Mr. Wier, I noticed that we just transferred your service. Did the connection go smoothly?

Customer: Yes - just fine. Thanks for your help today...

Lead Generation effects loyalty

ASK: What impact does lead generation have on promoting loyalty?

LEAD discussion to:

- Questioning uncovers unrealized needs, which create value for SBC

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What is a Lead?, Continued

Lead Generation Improves Customer Satisfaction

- Improves access
- Increases revenue
- Relieves support specialist of individual sales responsibilities, allowing them to focus on support functions
- Keeps customer open-minded
- Prevents oversell/overkill/double talk
- Increases consultative selling power by CSS and BSS applications specialists

ASK: Is lead generation a form of problem management or problem resolution?

EXPECT: Problem Management, because you are passing it to another for final resolution.

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The Lead Generation Process

How Leads Are Recorded

DESCRIBE the process of receiving credit for lead generation.

EMPHASIZE that a specialist will receive one (1) lead referral credit, per customer, for **successful** sales. Remember leads that do not result in a sale on the part of a BAS do not count as leads for the CSS.

EXAMPLE:

If the CSS speaks with one (1) customer and the needs identified may apply to five (5) Customer Service Records, the specialist will receive one (1) credit.

Lead Generation Sheet

EXPLAIN the proper completion of a lead generation form.

INTRODUCE example #1 (phone # 245-1241) on overhead projector by stating that it is a good example of how to compete a form.

LEAD discussion to:

- Manner in which information is filled out
- Level of detail of information/comments
- This is a good example of a lead generation form because it is not product specific

INTRODUCE examples #2 - #4

ASK participants if each is a good or bad example of a lead sheet.

LEAD discussion to:

- Example #2, (Phone # 686-1111) Bad example - customer would have ordered the service regardless
- Example #3, (Phone # 467-0517) Bad example - CSS "boxed in" BAS to offer call forwarding when other services may be more suitable
- Example #4, (Phone # 822-7810) Good example - Possible MemoryCall, add line, Call Waiting, Hunting

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The Lead Generation Process, Continued

Examples of Problem Types Managed Through Sales Lead Process

1. **BILLING QUESTIONS**

Customer calls in about toll calls. Customer Support Specialist answers customer's questions and realizes customer may be able to use some of our services.

> *"Mr. Customer, in looking at your calling patterns, I believe we have some services that could possibly help you save money on your toll calls. I recommend a Business Applications Specialist speak with you."*

The Customer Support Specialist completes a LEAD GENERATION FORM and under the SUPPORTING COMMENTS portion states:

> **SUPPORTING COMMENTS:**
> - Customer has $50.00 of tolls to XYZ city and is interested in services that would save him money.

2. **TRANSFER OF CONTRACT**

Customer calls requesting telephone number in his name, but does not request any additional services. Talk to the customer about his needs as a new customer.

NOTE: Something is changing since the owners will change and new people are responsible. Ask questions such as:

- "Mr. Customer, How will you be using the service when it is in your name?'
- "Mr. Customer, Now that you are the new owner, what changes would you like to see in your service?"
- "Now that you have had the service for a while, what changes need to be made?"

> One a need is discovered on the T of C, you must determine at what point to prepare the lead generation form. Remember, the T of C should be finalized before the new owner may make changes to his/her services.

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The Lead Generation Process, Continued

Miscellaneous Information

EMPHASIZE that in order to ensure that participants receive credit for leads they have generated they should take 2 actions:

1. Complete a lead generation form
2. In ALL Instances, the Customer Support Specialist should note the account of a lead referral.

EMPHASIZE that when attempting to transfer to a BAS in order to complete the sale and all BAS lines are busy and the customer insists on completing the transaction;

- CSS completes the sale and issues order
- CSS does not complete a lead generation form
- CSS does not receive credit for lead, but office does receive credit for sale

LEARNING ADVISOR'S NOTE: In addition, the Business Applications Specialist should note the status of ALL pending/closed lead generations.

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What is Not a Lead!

Characteristic of What Does NOT Qualify as a Lead

LEAD conversation into a discussion of what is not a lead.

REFER to the earlier presented *bad lead generation form* examples as a point from which to launch the discussion.

VERIFY that participants have mentioned each of the following examples. If not, cover them yourself.

Examples of Not a Lead

1. Anytime the customer initiates a request to add, change or delete a specific service, it is not a lead.

   When in doubt, ask yourself:

   Did I initiate the customer's interest in discussion of services to resolve a communications problem or need?

2. **Removal of services**; transfer to the Business Application Specialists to attempt to save.

3. Orders taken by Customer Support Specialist **correcting customer records** (i.e., features in translation, but customer not being billed).

4. Orders to **separate billing**.

5. **Transfer of Contracts**
   - Should customer initiate discussion of additional services at the time of T of C, THIS IS NOT A LEAD.

6. **Intra Company** requests
   - Installer Order
   - BAPCO Order
   - Maintenance/ Repair Center calls to verify if feature is being billed

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Passing a Lead to a BAS

Examples Of Positive Statements To Obtain Permission

EXPLAIN to participants that once they have determined that the best choice of action, (resulting in problem resolution) is through lead generation, they MUST obtain permission from the customer to either forward the call to a BAS or complete a lead generation form for future callback. This can be done in many different ways. In either instance, a lead generation form must be completed.

ILLUSTRATE various transitional phrases. A positive statement may work best. After presenting one example,

ASK participants to invent their own. Some examples are listed below:

- "I would like you to speak with one of our Business Applications Specialists to determine a solution."
- "I would like you to speak with a Business Applications Specialist."
- "I recommend you speak with a Business Applications Specialist to determine what would be best for you."
- "I recommend you speak with a Business Applications Specialist to analyze your situation and find the best solution."

Once Permission Is Gained Guidelines

EMPHASIZE that only after permission is gained, you may transfer, or if the customer prefers (or access requires), a call back/commitment may be established.

Should a commitment be made, offer commitment intervals:

* **If taken today by 11:00 a.m., call by 5:00 p.m. today**
* **After 11:00 a.m. today, call by 12:00 p.m. the next business day**

STATE: These are only guidelines, your office commitment guidelines may differ. Be aware of the customer's needs in that he/she may need more/less time for the call back.

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JOB-AID

Review For Potential Needs

Customer Support Specialist should always review the following information on the customer records for clues to potential needs:

- **DIRECTORY ADVERTISING IN OTHER CITIES**
- **TOLLS TO SAME CITY**
- **SEVERAL LISTINGS/ ONE LINE**
- **TYPE OF BUSINESS, I.E., REAL ESTATE, PHYSICIAN, ETC.**
- **CUSTOMER DOES NOT SUBSCRIBE TO ANY FEATURES**
- **CHECK MEMOS**

How To Obtain Leads

Phrases to use to obtain a lead may differ with each situation, as well as, each specialist. It is very important to handle the customer's request ENTIRELY and satisfactorily before you attempt a lead generation phrase.

List Of General Phrases/ Questions

In addition to the support tool (flip chart) some additional examples are shown of general phrases and/or questions to use to identify a need and convert to a lead.

1. *You mentioned you were out of the office quite frequently. We may have some services we can offer to help you operate your business more efficiently. Let me have a Business Applications Specialist contact you.*

2. *I have heard you say during our conversation that your customers are important to you. What happens to your customers when your not available?*

3. *How many customers will have your home number?*

4. *You mentioned a concern about your competitors. We have some newer services that may prevent your customers from going to a competitor.*

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JOB-AID, Continued

List Of General Phrases/ Questions (Continued)

15. *How do you handle the calls when you are on the line?*
16. *What happens if one of your drivers on the road has a problem and is unable to get through because of a busy signal?*
17. *You mentioned you are expanding. How do you plan to handle those additional calls?*
18. *How often have your customers told you they have had trouble reaching you? Was the line busy when they called or were you unavailable?*
19. *I noticed this is a real estate/insurance office. How much of the day will your sales force be in the office?*
20. *When your customers reach a busy signal, how many will call your competitor?*
21. *Would you like to get an idea of how many of your calls you may be losing to your competitors?*
22. *Do your customers have a hard time getting through to you? Do you wonder how many calls you have missed?*
23. *Do you find your fax machine ties your line up for extended periods of time?*
24. *Do you find times when you answer the phone and the calls are for your partner (or another person) in your office?*
25. *How important is it that your clients be able to reach you without getting a busy signal?*
26. *You said you have several employees who often use the phone. With only one (1) number, I imagine it would be in use a lot, am I right?*

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Example #2

CSS LEAD FORM

❑ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 9/21/95

Account #: (504) 245-1241 Call Customer By: _____

Customer Contact Name: Liz Date: _____

Call Back Number: (504) 822-7810 Time: _____

Possible Customer Needs

❑ FNA
❑ Calls Handled When Not Available
❑ Missing Calls
■ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other $200.00 COLLECT CALLS

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Example #4

CSS LEAD FORM

❑ Call Back Required
■ On-Line Transferred

CSS Name: Jane Doe
CSS User ID: _____
Date: 3/13/95

Account #: (504) 467-0517 Call Customer By: _____
Customer
Contact Name: Larry Date: _____
Call Back
Number: _____ Time: _____

Possible Customer Needs

❑ FNA
■ Calls Handled When Not Available
❑ Missing Calls
❑ Reduce Toll Cost
❑ Better Internal Communication
❑ Increase Market
■ Other NEEDS CALL FORWARDING

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