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Telecom
Sector
Skill
Council

# Participant Handbook

Sector
**Telecom**

Sub-Sector
**Service Provider**

Occupation
**Customer Service – Service Segment**

Reference ID: **TEL/Q0100,** Version **5.0**
NSQF Level **3**

## Call Center Executive

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> Skilling is building a better India.
> If we have to move India towards development then Skill Development should be our mission.

**Shri Narendra Modi**
Prime Minister of India

Telecom Sector Skill Council

# Certificate

## COMPLIANCE TO QUALIFICATION PACK– NATIONAL OCCUPATIONAL STANDARDS

is hereby issued by the

**TELECOM SECTOR SKILL COUNCIL**

for

## SKILLING CONTENT : PARTICIPANT HANDBOOK

Complying to National Occupational Standards of

Job Role/ Qualification Pack: "Call Center Executive" QP No. "TEL/Q0100, NSQF level 3.0"

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Authorised Signatory
(Telecom Sector Skill Council)

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The preparation of this handbook would not have been possible without the Telecom Industry's support. Industry feedback has been extremely encouraging from inception to conclusion and it is with their input that we have tried to bridge the skill gaps existing today in the industry.

This participant handbook is dedicated to the aspiring youth who desire to achieve special skills which will be a lifelong asset for their future endeavours.

## About this book

India is currently the world's second-largest telecommunications market with a subscriber base of 1.20 billion and has registered strong growth in the last decade and a half. The industry has grown over twenty times in just ten years. Telecommunication has supported the socioeconomic development of India and has played a significant role in narrowing down the rural-urban digital divide to some extent. The exponential growth witnessed by the telecom sector in the past decade has led to the development of telecom equipment manufacturing and other supporting industries.

Over the years, the telecom industry has created millions of jobs in India. The sector contributes around 6.5% to the country's GDP and has given employment to more than four million jobs, of which approximately 2.2 million direct and 1.8 million are indirect employees. The overall employment op-opportunities in the telecom sector are expected to grow by 20% in the country, implying additional jobs in the upcoming years.

This Participant handbook is designed to impart theoretical and practical skill training to students for becoming Call Center Executive in the Telecom Sector.

Telecom Call Center Executive is responsible for collecting e-waste from retailers, repair shops, and other unorganized stakeholders.

This Participant Handbook is based on Call Center Executive Qualification Pack (TEL/Q0100) and includes the following National Occupational Standards (NOSs):

1. TEL/N0101: Handle Telecom Customer Service and Sales Interactions
2. TEL/N0102: Engage Customers and Assist in Telecom Showroom Operations
3. TEL/N0115: Monitor, Review, and Improve Self-Performance
4. TEL/N2217: Maintain Workplace Efficiency and Personal Appearance
5. DGT/VSQ/N0101: Employability Skills (30 Hours)

The Key Learning Outcomes and the skills gained by the participant are defined in their respective units. Post this training, the participant will be able to manage the counter, promote, and sell the products and respond to queries on products and services.

We hope this Participant Handbook will provide sound learning support to our young friends to build an attractive career in the telecom industry.

## Symbols Used

Key Learning Outcomes | Steps | Notes | Practical | Unit Objectives

# Table of Contents



It is recommended that all trainings include the appropriate Employability skills Module. Content for the same is available here: **https://www.skillindiadigital.gov.in/content/list**

# 1. Introduction to the Telecom Sector and the Role of Call Center Executive

Unit 1.1 - Introduction to the Program

Unit 1.2 - Telecom Sector in India

Unit 1.3 - Role of a Customer Care Executive

TEL/N0101

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the significance of the telecom sector in modern communication and economic development.
2. Elucidate the key skills and technical expertise required for a Call Center Executive.
3. Describe the customer service by handling, following, and resolving walking-customer's queries, requests and complaints and proactively recommend/sell organization's products and services.
4. Describe the Call center specific concepts and methods for selling, up-selling and cross-selling.
5. Describe the process workflow in the organization.
6. Discuss the role and responsibilities of a Call Center Executive.

# UNIT 1.1: Introduction to the Program

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Discuss the agenda and importance of the program
2. List down the necessary skills on which the participants will be trained
3. Explain the ground rules to make the program effective

## 1.1.1 Program Overview

**The telecom industry**

Roles and responsibilities of a customer care executive (call centre/relationship centre)

- Customer care-specific key concepts
- Behavioural, professional, technical, and language skills required for performing the job effectively
- Techniques of shop/showroom/outlet and self-management
- Methods for selling, up-selling and cross-selling
- Managing service desk and customer management
- Ways to monitor and evaluate self-performance
- Techniques of data expertise
- Interview skills

**This Program Will Cover:**

- Communication skills
- Language Skills (Listening, Speaking, Reading and Writing Skills)
- Interpersonal Skills
- Rapport Building
- Time Management
- Customer-centricity
- Selling Skills
- Grooming Skills

## 1.1.2 Main Activities Performed by a Customer Care Executive

- Handle customer complaints
- Provide appropriate solutions and alternatives within the time limits
- Follow up to ensure resolution
- Keep records of customer interactions
- Process customer accounts and file documents
- Manage the shop/showroom/outlet
- Sell, Up-sell and Cross-sell organisation's products
- Take the extra mile to engage customers
- Monitor and analyse self-performance

### 1.1.3 Ground Rules

All the participants are expected to follow certain ground rules, which will facilitate an efficient learning environment. These rules are:

- Arrive and start on time.
- All participants are expected to participate in all phases of the workshop.
- The participants' mobile phones should be switched off or in silent mode.
- Participants must adhere to the timelines. If the break given to the participants is of 15 minutes,
- then everybody has to be in the training room within those 15 minutes.
- All the doubts should be asked to the facilitator. Trainees should not talk among themselves.
- Listen actively - respect others when they are talking.
- Learn and ask questions if you don't understand.

## Notes

# UNIT 1.2: Telecom Sector in India

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Discuss about the telecom industry and its various sub-sectors in India
2. Outline the growth of the mobile handset industry in India
3. List the top telecom product manufacturers in India
4. Identify the regularity authorities in the Telecom industry in India

## 1.2.1 Introduction to the Telecom Sector in India

India's telecom sector has grown faster than the overall economy in recent years. As of 2025, the country has over 1.2 billion subscribers, making it the second-largest telecom market in the world. Broadband users have crossed 979 million, showing rapid digital adoption.

The sector continues to generate new jobs, especially in sales, supervisory, and managerial roles, driven by 5G expansion, rising data usage, and rural market growth.

**Key Segments**

1. Network & IT Services – building infrastructure and connectivity.
2. Service Providers – offering mobile, internet, and digital services.
3. Retail & Distribution – ensuring product availability and customer engagement at the ground level.

The telecommunication sector is the backbone of India's digital economy and has revolutionized human communication by delivering high-speed voice and data services. With the rollout of 4G and 5G networks, the industry continues to drive industrial, economic, and social growth.

India is currently the second-largest telecommunications market in the world, with over 1.2 billion subscribers as of mid-2025. Broadband users have crossed 979 million, reflecting rapid internet adoption across urban and rural areas.

The telecom sector contributes significantly to India's GDP and is a major generator of employment. The rollout of 5G, cloud computing, AI, IoT, and big data analytics has created strong demand for skilled professionals. According to the Telecom Sector Skill Council (TSSC), the industry has a demand-supply gap of nearly 28%, especially in areas like 5G, mobile app development, AI/ML, and robotic process automation.

To bridge this gap, TSSC is working to train a world-class workforce and support the growth of telecom manufacturing, services, and distribution clusters.

## 1.1.2 Various Sub-Sectors of the Telecom Industry

Telecommunication is a multi-dimensional industry. It is divided into the following sub-sectors

- Telecom Infrastructure - It is a physical medium through which all the data flows. This includes telephone wires, cables, microwaves, satellites, and mobile technology such as fifth-generation (5G) mobile networks.
- Telecom Equipment - It includes a wide range of communication technologies, from transmission lines and communication satellites to radios and answering machines. Examples of telecommunications equipment include switches, routers, voice-over-internet protocol (VoIP), and smartphones.
- Telecom Services – A service provided by a telecommunications provider or a specified set of user- information transfer capabilities provided to a group of users by a telecommunications system. It includes voice, data and other hosts of services.
- Wireless Communication - It involves transferring information without a physical connection between two or more points.
- Broadband - It is wide bandwidth data transmission which transports multiple signals at a wide range of frequencies and Internet traffic types, that enables messages to be sent simultaneously and used in fast internet connections.


*Fig. 1.1.1: Telecom Sub-Sectors*

The major segments within these sub-sectors include the following:

- Wireless communications
- Communications equipment
- Processing systems and products
- Long-distance carriers
- Domestic telecom services
- Foreign telecom services
- Diversified communication services

## 1.1.3 Major Service Players in Telecom Industry

**Wireless Operators**

Market Share in 2022 (Wireless Subscribers)

As of February 2022, with ~ 1,145 million (114.5 crore) wireless subscribers (including inactive):

- Jio: 35.4 % (≈ 402.7 million users)
- Airtel: 31.5 % (≈ 358.1 million)
- Vodafone-Idea (Vi): 23.2 % (≈ 263.6 million)
- BSNL: 10.0 % (≈ 113.8 million)

These figures sum to ~ 100 % across those four players in the wireless space in that period.

The below graph shows each of these telecom giants' market share as of 2022.

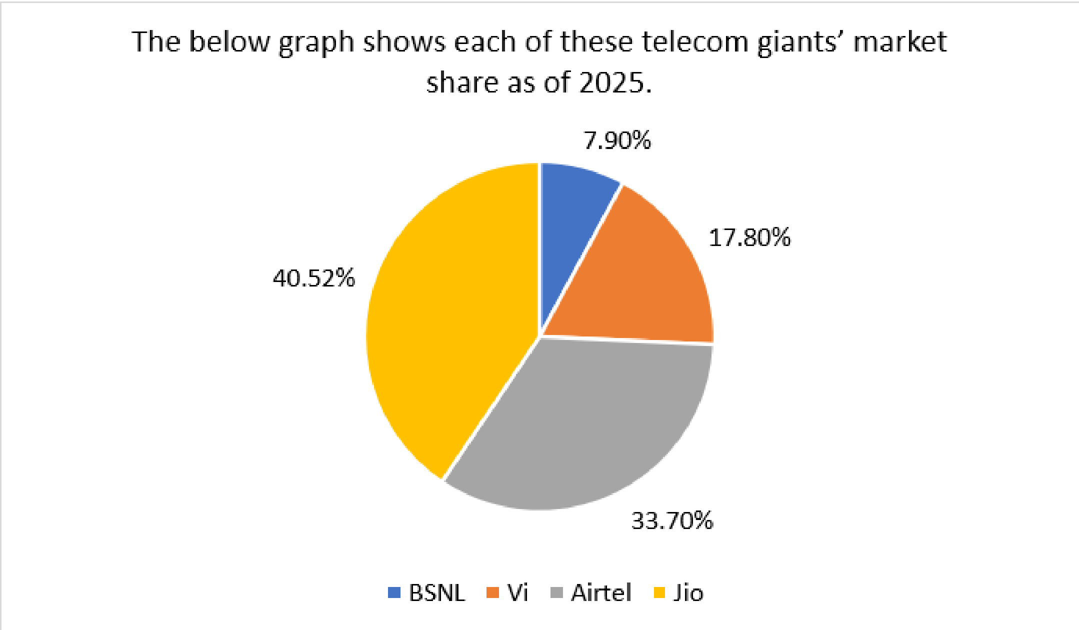


*Fig. 1.1.2: Market share of mobile telecom operators in India*
*Source: https://www.trai.gov.in/service-providers-view*

As of May 2025, there are about 3.87 crores (38.7 million) wireline subscribers in India, according to the Telecom Regulatory Authority of India (TRAI).

The below graph shows the market share of fixed-line telecom operators in India as of May 2025.

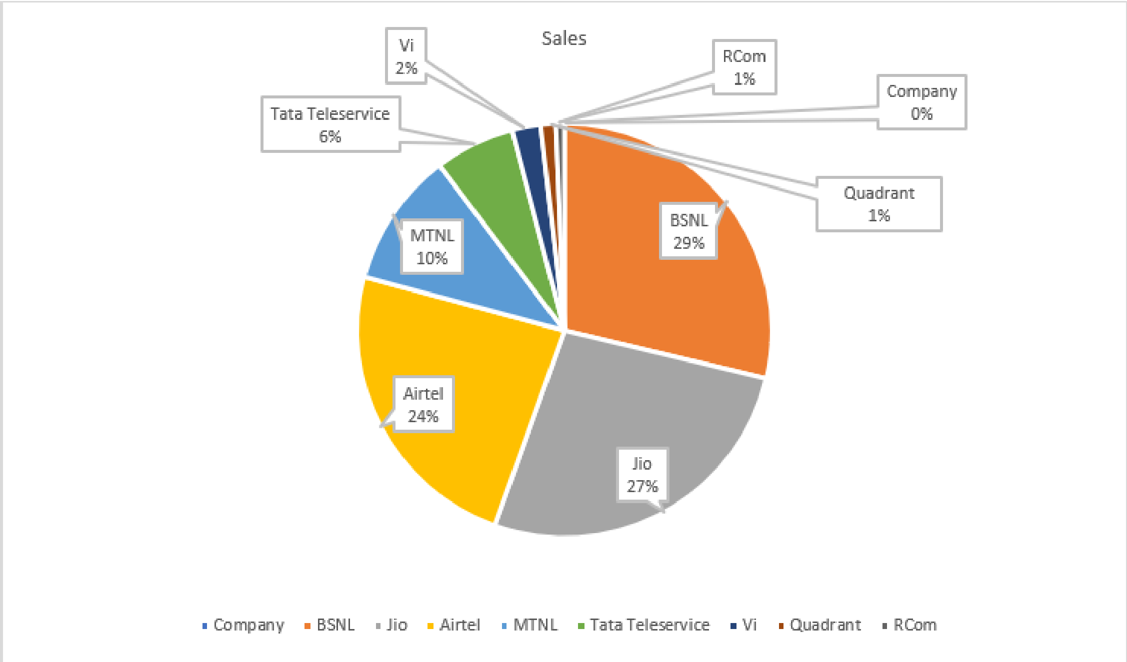


*Fig. 1.1.3: Market share of Fixed Line telecom operators in India*
*Source: https://www.trai.gov.in/service-providers-view*

**Internet service providers (ISPs)**

- An Internet Service Provider (ISP) is a company that provides individuals and organizations access to the internet and other related services. Below is the list of major ISPs in India (wired & wireless)

| | | | | |
|---|---|---|---|---|
| **Reliance Jio** | **Airtel** | **ACT Fibernet** | **Hathway** | **Vi** |
| **BSNL** | **Intech online private limited** | **Alliance Broadband** | **APSFL** | **Asianet Broadband** |
| **DEN Networks** | **Kerala Vision** | **Mu▯ Internet** | **RailTel Corporation of India** | **Sify** |
| **Spectranet** | **Tata Communications** | **Tata Play** | **S Net** | **GAILTEL** |
| **Tulip Telecom** | **ERNET** | **National Knowledge Network (for educational institutions only)** | **PowerGrid** | **CtrlS Datacenters Ltd** |

*Fig. 1.1.4: Major Internet Service Providers in India*

## 1.1.5 Regulatory Authorities in the Telecom Industry in India

Multiple regulatory authorities control the telecom sector in India. They are:

**TRAI - Telephone Regulatory Authority of India**

The Telecom Regulatory Authority of India, established in February 1997, regulates telecom services in India. Its scope includes fixing/revising tariffs for telecom services. The mission of TRAI is to create the environment needed for the growth of telecommunication at a pace that will empower India to play a major role in the emerging global information society.

One of the main objectives of TRAI is to provide a fair and transparent policy that facilitates fair competition. In January 2000, the Telecom Disputes Settlement and Appellate Tribunal (TDSAT) was set up to settle any dispute between a licensor and a licensee, between two or more service providers, between a service provider and a group of consumers, and to hear and dispose of appeals against any direction, decision or order of TRAI.

**TRAI Regulation on Call Centre**

1. 121 - General information number - Chargeable Call
2. 198 - Consumer care number - Toll-Free Number
3. Service Request - a request made pertaining to the account for:
    - Change in plan
    - Activation/deactivation of VAS/ supplementary service/special pack
    - Activation of service provided by the operator
    - Shifting/disconnection of service/billing details

**COAI - Cellular Operators Association of India**

The COAI was set up in 1995 as a registered non-governmental and non-profit society. COAI is the official voice for the cellular industry in India, and it interacts on its behalf with the licensor, telecom industry associations, man agreement spectrum agency and policy makers. The core members of COAI are private cellular operators such as Reliance Jio Infocom Limited, Idea Cellular Ltd., Bharti Airtel Ltd., Aircel Ltd., Videocon Telecom, Telenor (India) Communications Private Ltd., and Vodafone India Ltd., operating across the whole country.

**TDSAT - Telecom Disputes Settlement and Appellate Tribunal**

It is a special body set up exclusively to judge any dispute between the DoT and a licensee, between two or more service providers, or between a service provider and a group of consumers. An appeal against TDSAT shall be filed before the Supreme Court of India within ninety days.

The Department of Telecommunications, abbreviated to DoT, is a department of the Ministry of Communications of the executive branch of the GOI.

The DoT promotes standardization, research and development, private investment and international cooperation in matters relating to telecommunication services. It acts as a licensing body, formulates and enforces policies, allocates and administers resources such as spectrum and number, and coordinates matters in relation to telecommunication services in India.

## Notes

# UNIT 1.3: Role of a Customer Care Executive

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Analyse and obtain knowledge about the job of a Customer Care Executive
2. Identify the departments in a Call Center / Relationship Center
3. List the personal attributes of a Customer Care Executive
4. Illustrate the hierarchy & career path of a CCE in the organization

## 1.3.1 Key Concepts

- Call Centre: A company's direct contact centre that handles services such as customer support,bemergency response, telephone answering service, and outbound telemarketing is known as a call centre. A call centre handles a considerable volume of calls simultaneously, screens calls, forwards calls to someone qualified to handle them and eventually logs them.
- Help Desk: In a business enterprise, a help desk is a place where a customer can call to get help with a query, request or complaint. Generally, a help desk refers to an expert (CCE) with apt knowledge and computer applications, which help him answer the queries that come in.
- Relationship Centre: A Relationship Centre is generally a retail outlet/shop/showroom started by a telecom company which displays a range of products and offers services beneficial to customers. Customer care executives at these types of centres play a very important role in attending to the customers face-to-face. They manage the store as well as sell, up-sell and cross-sell the company's products and services.
- Service Centre: Every company has a CRM department, and a service centre is a part of that. Its main role is to work with customers for their immediate benefit through its contact centre, help desk and call management system.
- Service Desk: The service desk is a single point of contact between a company and its employees, customers and business partners. The main purpose of a service desk is to ensure that customers always receive appropriate assistance timely, and the service desk is one of the main options for customer support.

**Key Stakeholders**

The key stakeholders for the given job role are:

- Customer - The person who buys/avails our products/services.
- Store Manager (RC) - The person who is ultimately responsible for the day-to-day operations of a store.
- Supervisors/Team Leaders - The persons who lead the team and coordinate the overall work.
- Customer Care Executive - The one who provides customer service support to the company by interacting with customers face-to-face.

## 1.3.2 Customer Care Executive

A customer care executive belongs to an organisation or service centre and is responsible for managing customers' needs and replies and working on their satisfaction. Moreover, they are a link between the company and the customer.

CCE use their skills and experience to ensure that a company delivers the highest standards of service to customers and, based on it, create a positive perception of themselves as well as the company. A CCE is the most critical contact point for the customers to build a long-lasting relationship or loss of relation.

*Fig: 1.3.1: Customer Care Executive at Call Center*

## 1.3.3 Roles and Responsibilities of Customer Care Executive

Customer Care Executives work as a bridge between the customer and the organisation. They try to meet the customer's needs within the ambit of management policies. CCE should listen, understand, analyse a problem, come up with the best solution, make the customer feel that he has selected the right product or service from the company, and solve their problems and assist them.

| In a call centre | In a relationship centre |
|---|---|
| • Handle many inbound and outbound calls to<br>• customers.<br>• Identify the needs of customers, resolve issues, and provide solutions.<br>• Upsell related products wherever possible.<br>• Maintain cordial customer relations.<br>• Meet personal targets and work towards meeting team goals.<br>• Maintain records of the conversations with<br>• the customer and analyse the data.<br>• Write and submit timely reports on performance, targets, and customer queries. | • Provide customer service by handling, following up on, and resolving walk-in customers' queries, requests and complaints<br>• Manage the store/Relationship center<br>• Proactively recommend/sell organisation's products and services<br>• Monitor and analyse self-performance |

Table 1.3.1: Responsibilities of a CCE

**Approach to an Effective CCE**

An effective Customer Care Executive understands that his role is critical to the success of the organisation, so it is important that his approach is correct. The best approach for a Customer Care Executiveto work with customers is caring, as a customer who feels cared for is a customer for life.

**A CCE must follow the CARING approach as given below:**

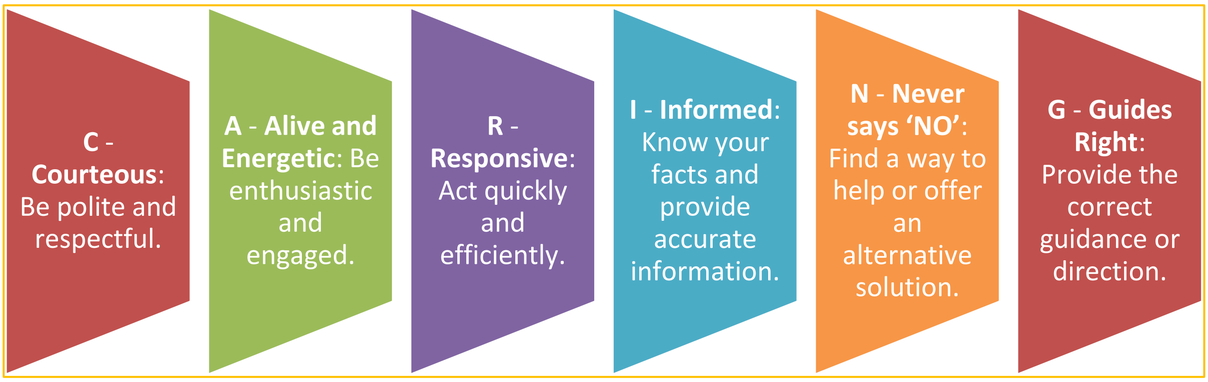


*Fig. 1.3.2: Caring approach*

## 1.3.4 Departments in Telecom Call Centre/Relationship Centre

*Fig. 1.3.3: Customer Care Executive*

**Departments in a Call Center/Relationship Center**


*Fig. 1.3.4: Departments in a Call Center / Relationship Center*

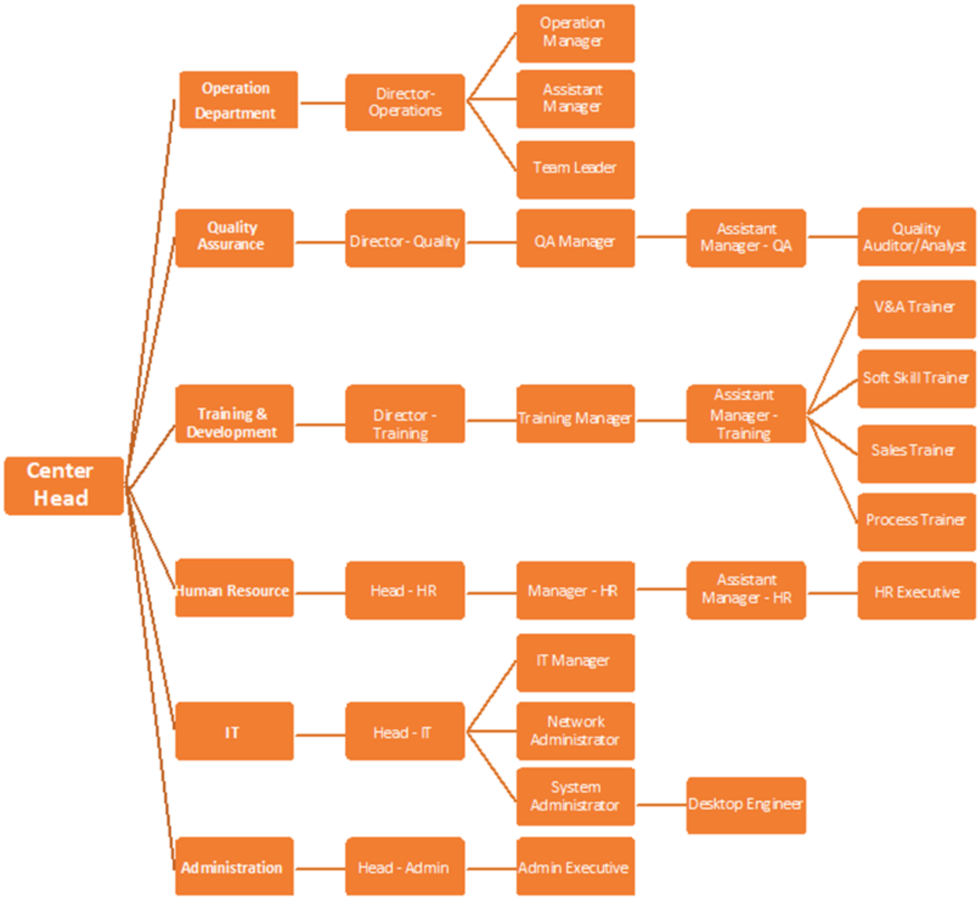


*Fig. 1.3.5: Department-wise Hierarchy*

## 1.3.5 Personal Attributes of a CCE

- Good communication skills with clear diction
- Ability to construct simple and rational sentences
- Good problem-solving skills
- Strong customer service focus
- Strong selling & listening skills
- Ability to work under pressure

## 1.3.6 Career Growth Path of a CCE

- Good communication skills with clear diction
- Ability to construct simple and rational sentences
- Good problem-solving skills
- Strong customer service focus
- Strong selling & listening skills
- Ability to work under pressure

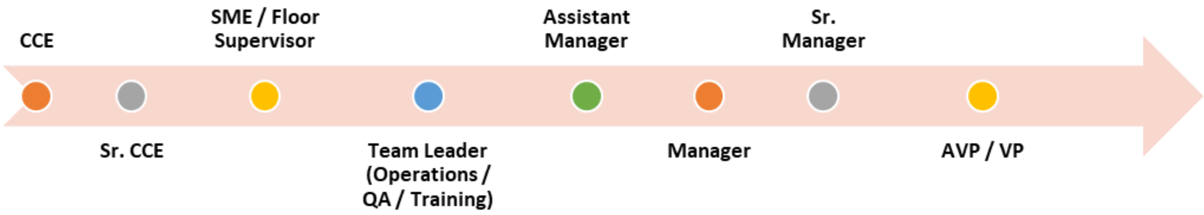


*Fig.1.3.6: Career Growth Path of a CCE*

## Exercise

**Short Questions:**

1. List the personal attributes of a Customer Care Executive.
2. Explain the challenges faced by the telecom industry.
3. Elaborate about the regulatory authorities in the telecom industry.
4. Provide an overview of the telecom industry in India.
5. Explain the role of a Customer Care Executive.

**Multiple Choice Questions:**

1. Some of the main activities performed by a Customer Care Executive are _________.
   a) Keeping records of customer interactions
   b) Processing customer accounts and filing documents
   c) Managing the shop/showroom/outlet
   d) All of the above
2. The Telecom industry in India is the ______ largest globally.
   a) 2nd
   b) 3rd
   c) 4th
   d) 5th
3. The major players in wireless communication in India are – Jio, Airtel, ________ and BSNL.
   a) Vi
   b) Wi
   c) Ci
   d) Ai
4. ISP stands for _________.
   a) Internet Service Provider
   b) International Service Provider
   c) Internet Service Protocol
   d) None of the above
5. The most common reasons for churning of customers are _________.
   a) Poor performance
   b) Poor customer service
   c) Poor rate plans
   d) All of the above

## Notes

# 2. Managing Customer Interactions and Query Resolution

Unit 2.1 - Customer Service Procedures and Communication
Unit 2.2 - Logging, Documentation, and CRM Usage
Unit 2.3 - Resolution, Prioritization, and Escalation

TEL/N0101

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the standard procedures for handling customer service and sales processes.
2. Describe how to collect and log customer queries, requests, and complaints using CRM tools and prescribed formats.
3. Demonstrate how to collect and log customer queries, requests, or complaints using the prescribed format in a CRM tool.
4. Discuss methods to assess customer details and history using CRM tools for providing accurate responses.
5. Explain how to categorize customer interactions and initiate appropriate resolution processes.
6. Demonstrate the process of providing immediate solutions and informing customers about estimated resolution times.
7. Describe techniques for addressing customer queries, requests, and complaints promptly and efficiently.
8. Elucidate the process of prioritizing customer interactions based on urgency.
9. Show how to document customer interactions accurately in the CRM system.
10. Explain the importance of providing immediate solutions where possible and informing customers about estimated resolution times.
11. Discuss escalation procedures and how to seek guidance for unresolved queries.
12. Show how to follow escalation procedures for unresolved queries and communicate them effectively to supervisors.
13. Demonstrate the process of coordinating with relevant departments to ensure timely resolution of customer concerns.
14. Enlist methods for coordinating with other departments to ensure timely resolution of customer concerns.
15. Explain the importance of documenting customer interactions and resolutions in the CRM system.
16. Show how to categorize customer interactions and initiate appropriate resolution processes.
17. Demonstrate professional communication skills while addressing customer queries courteously via phone and in person.
18. Show how to prioritize customer queries and complaints based on urgency and organizational guidelines.

# UNIT 2.1: Customer Service Procedures and Communication

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the standard procedures for handling customer service and sales processes.
2. Describe techniques for addressing customer queries, requests, and complaints promptly and efficiently.
3. Demonstrate professional communication skills while addressing customer queries courteously via phone and in person.

## 2.1.1 Standard Procedures for Handling Customer Service and Sales Processes

Call centres must implement some standards and procedures to enhance the effectiveness of the services provided to the customers. Implementing these standards and procedures will ensure the growth of loyalty among customers, allowing an organization to form a strong customer base. Some standards that must be implemented are:

- Availability
- Generosity
- Firmness
- Efficiency
- Receptivity
- Capability

The procedures that can be incorporated to enhance the services are:

- Clarify the objective
- Obtain input
- clear writing
- Ease of access
- Reinstating the methods

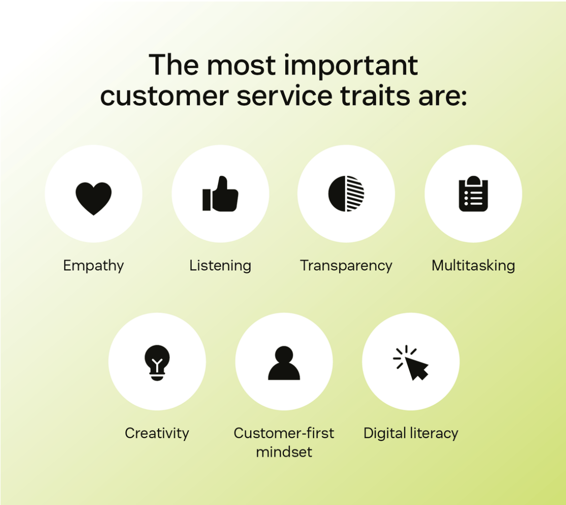


*Fig. 2.1.1 Customer service traits*

**Concept of Customer Service**

The customer is the king. Customers can either be Consumer customers or Business customers. Increasing the customer base is the ultimate goal of every business since; the "more the customers, the more likely to be the business profitability."

Excellent customer service is an organisation's ability to exceed the customer's expectations each time and every time. It's all about attitude and skills.

- Attend to customers (Greet, introduce products, understand needs, give the information asked for like guarantee, features, advantages, discounts, etc.)
- Give product choices and information (offer different products available, give information like guarantee, comparative features, advantages, discounts, etc.)

- Offer the best solutions to the customer (help make the best choice keeping all interests in mind to ensure that a sale can be closed as well as ensure that the customer's need is fulfilled)
- Handle customer queries, requests or complaints (such as renewal of subscription, queries on
- new plans, complaints about network troubles or overbilling, troubleshoot and resolve customer's product/service-related issues)
- Clear doubts or queries, if any, about price, quality, features, and handle objections)

**Importance of Customer Service**

- The objective of any organization is to fulfil a customer's needs; hence customer satisfaction plays a vital role in any business.
- Customers help in meeting business objectives.
- Customers are a source of revenue generation for the business.

**Characteristics of Excellent Customer Service**

Not all customer service qualities are obvious, and it's a place many organizations fall short in. Customers who are attentive enough to reach out for assistance will always be able to spot the difference between above-and-beyond customer service and disjointed, sloppy service.

**Characteristics of excellent customer service are:**

- Respectfulness
- Active listening skills
- Empathetic behaviour
- Responsiveness
- Excellent communication skills
- Positive attitude
- Flexibility
- Patience
- Sensitivity
- Customer centricity
- Product and service expertise
- Creative problem-solving abilities

**Building Rapport with Customers**

As a customer service representative, you are responsible for helping the customer out as best as possible. Helping them out can mean a lot of things. Highlight certain features and facts to them as considered necessary, and direct them to the right department. Either way, you must help the customer as best as possible.

**Dos and Don'ts of establishing a good rapport**

| Open Ended Questions | Close Ended Questions |
|---|---|
| • Use the Customer's name<br>• Be polite<br>• Be honest<br>• Smile<br>• Give your full attention<br>• Take ownership<br>• Follow up<br>• Enjoy what you do | • Take it personally<br>• Use negative words<br>• Be sarcastic<br>• Make excuses<br>• Lie<br>• Pass the buck<br>• Get into confrontation<br>• Tighten the face |

Table 2.1.1: Dos and Don'ts of establishing a good rapport

**Attendance and Time in Office**

**Office Timings**

- CCE should reach the office on time.
- Ideally, one should be in the office at least 15 minutes before the start of the shift.
- The office duration is generally 9 hours in a call centre.

**Call Login Hours**

- In most organizations, login time is generally 8 hours.
- Login time is the time during which an executive is logged into the system and is ready to take calls or is taking a call. Login time also includes hold and wrap-up time.

**Timing for Call (Time Zone)**

- Operation hours of a company should be in tandem with the time zone of the customers who are being serviced.
- For example, in case, theclients require us to serve the US customer base, then the call centre
- staffing should be mapped as per the US time zone.
- Holidays of the call centre staff generally depend on the geography of the customers being serviced.
- For example, in case the area of service is South India, then the list of holidays relevant to South India will be applicable.

**First Call Resolution (FCR)**


*Fig. 2.1.2 Result of first call resolution*

**Service Level Agreement**

A service-level agreement (SLA) is a contract between a service provider and its customers that document what services the provider will provide and defines the service standards the provider is obligated to meet.

**SLA involves:**

I. Answering a certain number of calls in a defined weight threshold. For example, x percent of calls need to be answered in y seconds or less.

II. Service level is the most important speed-of-service measure in a call centre. Service providers need SLAs to help them manage customer expectations and define the severity levels and circumstances under which they are not liable for outages or performance issues.

**Turnaround Time (TAT) / Response Time**

- Turnaround Time, commonly known as TAT, is the time interval from the time of submission of a process
- to the time of the completion of the process.It is mandatory to inform the TAT of the request/complaint
- to the customer.
- TAT for Complaints: Turn Around Time is the time elapsed between the complaint registered and the complaint resolved.
- TAT for Processes, Products and Services: Might vary from provider to provider. However, general requests like voice mail activation and international dialling activation take around four hours post which customers power cycle their handsets to avail benefits of the services.

**Processes**

- Sales Target: The term is used to describe an individual sales representative or sales team's expected
- performance over a given time period. The individual must understand sales targets and influence
- customers to buy products.
- Monthly Target: Monthly target is a specified amount of sales that a management sets for achieving
- or exceeding within a specified timeframe.
- Sales Process: A sales process describes an approach to selling a product or service. It includes
- seller and buyer risk management, standardized customer interaction during sales, and scalable
- revenue generation.

**A sales process consists of the following steps:**

- Approaching the customer
- Probing to identify needs
- Presenting and demonstrating products and services
- Handling objections
- Making the sale
- Building future sales

- Sales Reporting: The reporting functions manage a company's overall sales structure. Sales reporting starts with an analysis of the lowest level of data. It means building the data, giving a detailed view of sales within a defined period, and projecting it into the future. Sales reporting provides visibility into a company's sales pipeline, integrating information from sales, customer, and financial sources for a complete picture of sales performance.
- Customer Service: Customer Service is providing service to customers before, during and after a purchase. It is a series of activities designed to enhance the level of customer satisfaction – that is, the feeling that a product or service has met customer expectations.

Based on the content you provided, here is a reorganized and improved version, focusing on clarity and a logical flow. I've used headings and bullet points to make the information easier to digest.

## 2.1.2 Responding to Customer Questions

As a call center executive, you are the first point of contact for customers. Your role involves more than just answering questions—you represent the company, handle inquiries about products and services, and resolve customer issues. To do this effectively, you need to understand the different types of customer calls and how to handle them.

**Categorizing Customer Calls (QRC)**

Customer interactions can be categorized as a Query, a Request, or a Complaint. The key is to categorize the call based on the final resolution, not the customer's initial tone or what they say they're calling about. For example, a customer might call to complain that they can't make a call, but if the issue is a simple low balance, the resolution makes it a query.

**Types of Customer Interactions**

**Here's a breakdown of the three main types of interactions:**

**1. Queries**

A query is a simple question or inquiry where the customer is seeking information.

- Common Queries:
    - Balance or billing inquiries
    - Account-related questions
    - Information about new products, services, or tariffs
    - VAS (Value-Added Services) related questions

**2. Requests**

A request is when a customer asks for a product or service. This can be handled in two ways:

- Request - Open: The agent must take action and provide information, but the final action is completed by a backend team.
    - Example: A customer requests a change in their tariff plan. You inform them it will be effective in the next billing cycle and log it as an Open request because the backend team will process it later.
- Request - Self-Closed: The agent can take an online action to fulfill the request instantly.
    - Example: A customer wants to deactivate their caller tune. You deactivate it immediately using a vendor link and close the request yourself.

**3. Complaints**

A complaint is when a customer expresses dissatisfaction with a service or product. Like requests, complaints can be categorized by how they are resolved:

- Complaint - Open: The agent must log the issue, but it can only be resolved by a backend team. This is done for:
    - o Service, product, or process gaps
    - o Validated disputes
    - o Failure to receive promised benefits
- Complaint - Self-Closed: The agent can resolve the complaint directly without needing a backend team. This is possible in these scenarios:
    - o Online Waiver: You can apply a waiver within your limits (e.g., a penalty for a late payment).
    - o Planned Downtime: You are aware of a planned network outage and can inform the customer that the issue is being resolved.
    - o Known Issues: You know about a widespread problem (e.g., a recharge promotion benefit not being credited) and can provide the customer with a definite resolution time (e.g., "The benefits will be credited within one week").
    - o Known Service Disruptions: You have a communication about a known technical problem and can inform the customer when it will be fixed.

**Key Skills for Call Center Executives**

**Addressing Customer QRCs**

When a customer calls, follow these steps:

- Obtain enough information to log the request or complaint.
- Try to resolve the issue yourself through effective probing and system checks.
- Provide the customer with an estimated resolution time (TAT - Turn Around Time).
- Share the request or complaint number with the customer.
- For calls related to accounts or PUK information, verify the customer's details.

**Handling Complaints and Escalations**

When a customer complains, your professional response is crucial.

- Stay Calm: Remember the customer is upset about the problem, not you personally.
- Listen and Empathize: Listen attentively, do not interrupt, and show empathy.
- Acknowledge and Apologize: Paraphrase the issue to show you understand, then apologize for their concern.
- Focus on Resolution: Explain the steps you will take to solve the problem and thank the customer for their patience.

**Escalation Process**

Before escalating a call, try to resolve it yourself by following these steps:

- Empathize with the customer.
- Listen to their concern without interrupting.
- Review their account and any previous complaints.
- Ask probing questions to fully understand the issue.
- Take appropriate steps to fix the problem.

If the customer still insists on speaking with a manager, escalate the call without arguing. Inform the customer that you are transferring their call. If a supervisor isn't available, offer the option of a call-back within a specified time frame (e.g., two hours).

## 2.1.3 Professional Communication Skills While Addressing Customer Queries

**Communication Skills Via Phone**

**Do's**

- Answer calls within 3 rings.
- Greet the customer warmly: "Good morning, thank you for calling [Company Name], this is [Your Name]. How may I assist you?"
- Use a calm and friendly tone throughout the call.
- Take notes of the query to avoid repetition.
- Confirm before ending: "Is there anything else I can assist you with today?"

**Don'ts**

- Do not put the customer on hold for too long without updating.
- Avoid eating, drinking, or background noise during calls.
- Never argue or raise your voice.

**Communication in Person**

**Do's**

- Greet the customer with a smile and polite words.
- Maintain eye contact and attentive body posture.
- Listen carefully and show interest in their concern.
- Offer solutions or guide them to the correct desk/person if needed.
- End the conversation by thanking them: "Thank you for visiting us, have a great day!"

**Don'ts**

- Avoid distractions like mobile phone use.
- Do not ignore or make the customer wait unnecessarily.
- Avoid crossing arms, frowning, or showing irritation.

# Notes

# UNIT 2.2: Logging, Documentation, and CRM Usage

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Describe how to collect and log customer queries, requests, and complaints using CRM tools and prescribed formats.
2. Demonstrate how to collect and log customer queries, requests, or complaints using the prescribed format in a CRM tool.
3. Discuss methods to assess customer details and history using CRM tools for providing accurate responses.
4. Show how to document customer interactions accurately in the CRM system.
5. Explain the importance of documenting customer interactions and resolutions in the CRM system.

## 2.2.1 Importance of Logging Customer Enquiries

The best way to enhance the reliability of customers is to provide great service on a continuous basis. Most customers worldwide emphasize that customer service is the most important factor that decides their loyalty towards a particular brand. And in the process of providing customer service, the main component is the way to manage the inquiries made by a customer.

Effective handling of customer enquiry ensures a customer's satisfaction. When a customer comes looking for information or support, it is important to provide them with a great experience. The smoother and more effective the resolution, the more loyal a customer becomes. It is therefore very important to handle a customer's inquiries with great care. One of the most vital steps included in this is managing the queue of customer inquiries.

A customer care executive needs to understand how to handle the various kinds of demands made by customers, how to escalate things, which is provided with what kind of responsibility and what mode of approach is to be taken for what issue.

**Ways to Handle Customer Enquiries Effectively**


*Fig. 2.2.1: Ways to handle customer queries*

**1. Creating a Proper Organizational Diagram**

The first step in managing a call centre is to create a clear organizational diagram. It helps employees understand roles and responsibilities. A written description further ensures clarity. Key considerations include:

- How will escalations be handled?
- What tools/instruments are available and how will they be used?
- Should a backup team be created for VIP or high-pressure situations?
- Will a ticketing system be used to balance workload?
- Which channels, categories, and tasks are assigned to whom?

**2. Advanced Assistance for Customer Service Questions**

Customers expect quick solutions and often leave after one failed attempt. To ensure effective handling:

- Use first-come, first-serve for smaller teams.
- Categorize support by customer, channel, or task (e.g., phone requires instant response, email allows more time).
- Prioritize high-value customers and urgent cases.

**3. Cataloguing Enquiries**

After prioritization, inquiries should be categorized by type and assigned to the right team member.

Examples of categories: Online Marketplaces, IT, Marketing, Sales, Growth, Personal Assignments, Not Assigned.

**Levels of handling:**

- Level 1 – Basic queries handled by regular agents.
- Level 2 – Complex queries needing experienced agents.
- Level 3 – Critical issues requiring expert intervention.

**4. Promoting Self-Service**

Many issues are repetitive and can be solved through self-service. Preparing FAQs, step-by-step guides, or knowledge bases helps customers resolve problems independently, reducing workload and saving time.

**5. Examining the Data**

Key Performance Indicators (KPIs) must be implemented to track efficiency and service quality. Important parameters include:

- Average handling time
- Response time
- Resolution time
- Customer satisfaction (via surveys, ratings, and feedback)

Analyzing this data helps identify improvement areas and enhance overall effectiveness.

**6. Examining a Variety of Approaches**

There is no single perfect method for handling customer inquiries. Different approaches should be tested and refined using continuous customer feedback. Options include:

- First-Come, First-Serve: Simple and effective for smaller teams.
- Ticketing System: Better suited for larger teams to manage workload and priorities.

Whichever method is chosen, the entire team must be aware of the process and trained regularly to ensure consistency.

## 2.2.2 Customer Query/Request/Complaint Template

**Case ID: (Auto-generated by CRM, e.g., #CS-98765)**

**1. Customer Details**

- Customer Name:
- Customer ID/Account Number:
- Contact Information: (Phone, Email, etc.)
- Preferred Communication Method:

**2. Case Information**

- Subject/Title: (e.g., "Refund Request," "Login Issue")
- Date/Time of Submission:
- Case Status: (New, In Progress, On Hold, Resolved, Closed)
- Case Priority: (High, Medium, Low)
- Source: (Phone, Email, Live Chat, Social Media, Walk-in)
- Case Category: (Complaint, Inquiry, Billing, Technical Support, Product Feedback, etc.)
- Case Sub-category: (e.g., Shipping Delay, Password Reset, Incorrect Charge)
- Assigned Agent:

**3. Detailed Description**

- Customer's Query/Request/Complaint:
  - What exactly is the issue? Use the customer's own words where possible.
- Relevant Information:
  - Include any order numbers, product names, dates, or other specifics.
- Desired Outcome:
  - What does the customer want? (e.g., refund, replacement, update, apology).

**4. Internal Notes & Actions**

- Internal Communication:
  - o Notes for the team. This section is not visible to the customer.
- Actions Taken:
  - o List of steps taken to resolve the issue.
- Follow-Up Date/Time: (If a follow-up is required)

Using this template ensures that all key information is logged in a consistent and organized manner, making it easier to track, manage, and resolve customer issues effectively.

## 2.2.3 Using CRM Tools for Accurate Responses

To assess customer details and history using CRM tools for providing accurate responses, you should use the CRM's core functionalities to access and analyze customer data.

**1. Accessing Customer Profile**

Start by searching for the customer in the CRM using their name, email, or account number. This action takes you to their individual customer profile, which is the central hub for all their information.

- Key Information: Look for basic details like their name, contact information, and company. Check for any tags or labels that categorize them (e.g., "VIP," "New Customer," "Enterprise Account").
- Activity History: This is a crucial section. It provides a timeline of all past interactions. This includes:
  - o Communication logs: Past emails, phone call notes, and chat transcripts. Reviewing these helps you understand previous conversations and avoid asking repetitive questions.
  - o Case or Ticket History: See all the past support tickets they've submitted, their status (open or closed), and the resolution provided. This is vital for understanding recurring issues.
  - o Purchase History: Check which products or services they've bought, when they purchased them, and the value of their orders. This helps in tailoring your response with relevant product knowledge.

**2. Using Data and Analytics**

Many CRMs have built-in analytical tools that provide a broader view of a customer's engagement.

- Customer Health Score: Some CRMs use a scoring system to indicate a customer's engagement and satisfaction level. A low score might signal a need for more attentive service.
- Customer Segmentation: Customers can be grouped by characteristics like purchase behavior, location, or industry. Understanding which segment a customer belongs to allows for a more personalized and relevant response. By systematically using these methods, you can gain a comprehensive understanding of a customer's history and provide a quick, accurate, and personalized response that shows you value their time and business.

**3. Updating the Profile**

After assessing the information, it's essential to update the customer's profile to maintain data accuracy.

- Log the current interaction: Record the details of your conversation, including the customer's query and your response, in a new note or case.
- Update information: If the customer provides new contact details or updates their preferences, be sure to change them in their profile.
- Add Tags: Add new tags to reflect their current situation (e.g., "Billing Issue," "Product Inquiry"). This makes it easier for future team members to quickly understand the context.

By systematically using these methods, you can gain a comprehensive understanding of a customer's history and provide a quick, accurate, and personalized response that shows you value their time and business.

# Notes

# UNIT 2.3: Resolution, Prioritization, and Escalation

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain how to categorize customer interactions and initiate appropriate resolution processes.
2. Show how to categorize customer interactions and initiate appropriate resolution processes.
3. Explain the importance of providing immediate solutions where possible and informing customers about estimated resolution times.
4. Demonstrate the process of providing immediate solutions and informing customers about estimated resolution times.
5. Elucidate the process of prioritizing customer interactions based on urgency.
6. Show how to prioritize customer queries and complaints based on urgency and organizational guidelines.
7. Discuss escalation procedures and how to seek guidance for unresolved queries.
8. Show how to follow escalation procedures for unresolved queries and communicate them effectively to supervisors.
9. Demonstrate the process of coordinating with relevant departments to ensure timely resolution of customer concerns.
10. Enlist methods for coordinating with other departments to ensure timely resolution of customer concerns.

## 2.3.1 Customer Relationship

**Customer Relationship Management (CRM)**

A customer relationship refers to the association that exists between an organisation and its customers. These relationships can be built and strengthened through the products or services offered. In the telecom industry, customer relationships are particularly important, as companies typically engage in long-term associations with their customers.

The process of maintaining and nurturing these relationships is known as Customer Relationship Management (CRM). CRM enables organisations to better understand customer needs and address them efficiently, effectively, and accurately. Since customer information extends far beyond what can be stored in human memory, organisations rely on CRM tools and applications to record, track, and manage customer data.

**Advantages of CRM**

- Maintain a History: CRM systems help record customers' past purchases, interactions, and requests. This historical data allows companies to anticipate needs, improve satisfaction, and increase profitability.
- Customer Categorisation: CRM enables segmentation of customers based on the value they bring to the business. This insight helps organisations tailor services and benefits to different customer groups.
- Improves Customer Loyalty: By fostering positive relationships, companies strengthen customer loyalty, leading to repeat business and long-term profitability.

- Encourages Word-of-Mouth Promotion & Enhances Reputation: Satisfied customers often share their positive experiences with others. This word-of-mouth advertising enhances the company's reputation and attracts new customers.


*Fig. 2.3.1 Benefits of CRM*

**Customer Categorization**

In today's world, telecom companies serve millions of customers, making it challenging to offer every individual the most suitable products and services. To address this, companies have adopted customer categorisation. By classifying customers based on specific criteria—broadly divided into landline users and cell phone users—telecom providers can better understand customer needs and design customised products and services that match those requirements.

**Importance of Categorising Customers**

With the wide range of products and services offered by telecom companies today, it becomes nearly impossible to provide customised solutions without categorising customers. Categorisation helps organisations understand customer needs more precisely, enabling them to offer relevant services and solutions. This not only enhances customer satisfaction but also leads to increased profitability for the company.

### Types of Categorisation

Customers can be categorised based on various criteria such as:

- Geographical location
- Spending patterns
- Usage behaviour
- Services utilised
- Type of service
- Value-added services (VAS)

For our purposes, we will focus on two key criteria: type of service and usage.

### Types of Services

Telecom services are broadly divided into two categories:

- Landline
- Mobile

### Landline Services

Landline services refer to telephone connections that are installed at a specific location, such as a home or an office. These services can be further classified into:

- Home Landline
- Office Landline (Corporate)
- Hotline Services

### Home Landline

A home landline is a standard telephone connection installed in a residence. It can be either wired or wireless.

- Traditional wired landlines are now offered by a limited number of service providers, such as Bharat Sanchar Nigam Limited (BSNL) and Mahanagar Telephone Nigam Limited (MTNL).
- Wireless landlines are provided by most leading telecom companies like Tata Teleservices, Reliance Communications, Bharti Airtel, Vodafone India, and Idea Cellular.

*Fig 2.3.2 Landline Phone*

### Office Landline (Corporate Customers)

Office landline customers, also known as corporate customers, have specialised requirements. Typically , they need a single main phone number — either a 10-digit mobile number or an 8-digit landline number — that connects to multiple extensions.

- These extensions, ranging from 4-digit to 7-digit numbers, allow calls to be routed within the organisation's internal network.
- This setup helps companies manage multiple departments or employees efficiently under one central contact number.


*Fig 2.3.3  Landline phone at office*

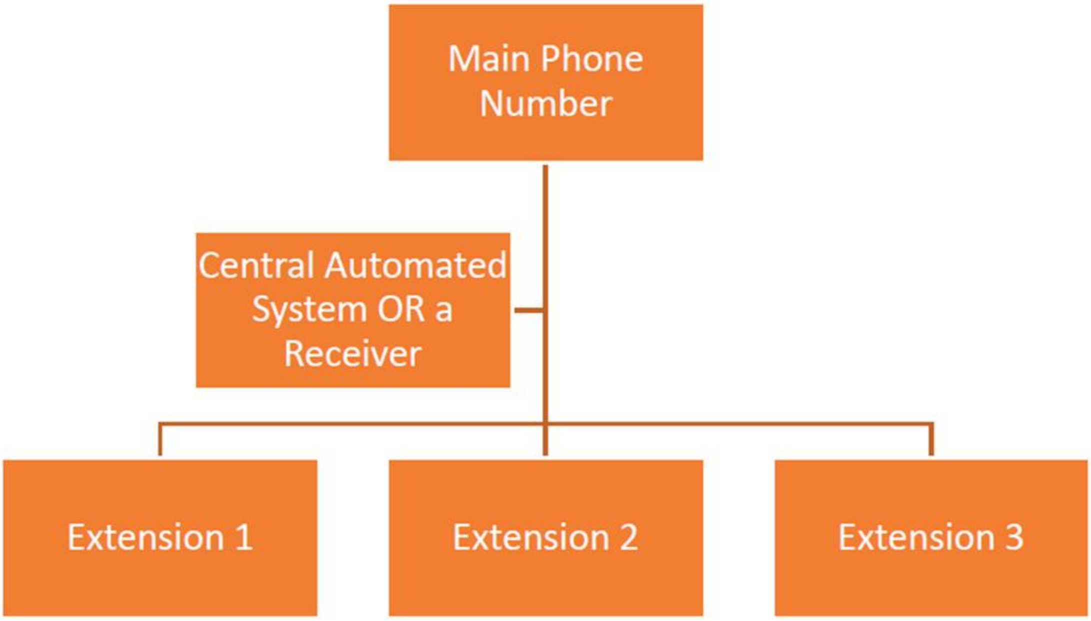


*Fig 2.3.4  Extension-wise call transfer*

**Hotline –** A hotline is a more advanced model of an office phone connection, primarily used in the Customer Service industry, followed by Sales. Compared to a standard office number, a hotline number has a more complex structure. It can be either a regular 8-digit number or a 10-digit number, such as the 1800-series number.

The main hotline number is linked to an automated system called a VRU (Voice Response Unit), which provides recorded options for the caller. Based on the customer’s selection, the system automatically transfers the call to a sub-number, routing it to the extension that has been free the longest.

**Example:**

If you call ABC Telecom at 1800 123 456, the VRU system answers the call and provides the following options:

- Dial 1 for Service
- Dial 2 for Sales
- Dial 3 for Complaints

Each department has a sub-number under the main hotline number (1800 123 456). Depending on your choice, the call is transferred to the corresponding department and then automatically routed to the extension of the staff member who has been available the longest.

## 2.3.2 How to Categorize Customer Interactions

A customer care executive must be skilled in classifying customer interactions to ensure that each issue is handled efficiently and correctly. Categorizing a customer query is the first and most critical step in the resolution process. It allows you to prioritize issues, route them to the right team, and apply the correct standard operating procedure.

Customer interactions can be categorized based on several key factors. Think of this as a triage process, similar to what a medical professional would do in an emergency room.

**1. By Issue Type:**

This is the most common method. You classify the interaction based on the nature of the problem.

- Technical Support: Issues related to a product or service not working as intended (e.g., a software bug, a malfunctioning device).
- Billing & Payments: Questions or disputes about invoices, charges, refunds, or payment methods.
- Shipping & Logistics: Queries about delivery status, lost packages, or damaged goods.
- Product Inquiry: Questions about product features, specifications, or availability.
- Complaint: Customer expressing dissatisfaction with a product, service, or employee.
- General Inquiry: A broad question that doesn't fit into the other categories.

**2. By Urgency or Priority:**

This determines how quickly the issue needs to be addressed.

- High Priority: An issue that is severely impacting the customer or business. Examples include a complete service outage for a business client or a safety-related complaint.
- Medium Priority: An issue that is causing inconvenience but is not critical, like a billing error.
- Low Priority: General questions or feedback that can be addressed when time permits.

**3. By Customer Segment:**

Some issues are categorized based on who the customer is.

- VIP/Key Accounts: Issues from high-value customers might be escalated automatically to a dedicated team.
- New Customers: Queries from new users might be handled with extra care to ensure a positive first experience.

**How to Initiate Appropriate Resolution Processes**

Once an interaction is categorized, you can initiate the correct resolution process. This process is often governed by predefined workflows and standard operating procedures (SOPs).

1. Log the Interaction: The first step is to create a new case or ticket in the CRM. The case should be accurately tagged with the categories you identified (e.g., "Billing," "High Priority," "VIP").
2. Apply a Standard Procedure: For common issues, there will be a documented procedure to follow.
   - Example: Billing Error. The procedure might be:
     - Verify the customer's account and billing history.
     - Cross-reference the charges with the service agreement.
     - If an error is found, process a credit or refund.
     - Send a confirmation email to the customer.
3. Route and Escalate: If the issue is complex or falls outside of your expertise, you must escalate it to the appropriate internal team.
   - Escalation Path: Use the categories to determine the correct team. A "technical support" query might be routed to the IT department, while a "legal" issue would go to the legal team. The CRM system often has rules to automate this routing process.
4. Communicate with the Customer: Throughout the process, keep the customer informed. Provide them with a case number, an estimated resolution time, and updates on the progress.
5. Document the Resolution: Once the issue is resolved, document the final solution in the case notes. This ensures that you have a complete record for future reference and for improving internal processes.

## 2.3.3 The Importance of Immediate Solutions and Timely Updates

In a telecom call centre, providing immediate solutions wherever possible and keeping customers informed of estimated resolution times are critical for building trust and enhancing customer satisfaction. Immediate solutions help resolve simple queries or requests quickly, leaving the customer feeling valued and supported. For more complex issues that require backend intervention, providing an accurate estimated resolution time ensures transparency, manages customer expectations, and reduces frustration. The following scenarios illustrate the difference between actions that can be resolved instantly and those that require planned follow-up, along with sample dialogues demonstrating professional communication.

**Examples of Immediate Solutions vs. Estimated Resolution Times**

| Scenario (Customer Query) | Type of Resolution | Action Taken by Agent | Time Taken | Sample Dialogue |
|---|---|---|---|---|
| 1. Customer forgot online account password | Immediate Solution | Reset password on the spot | 2 minutes | "I can reset your password right now. Please follow the steps I am sharing." |
| 2. Customer asks for current prepaid balance | Immediate Solution | Check in system and inform balance | 1 minute | "Your current balance is ₹153. You have 2 GB data remaining." |
| 3. Customer wants to activate caller tune | Immediate Solution | Activate service immediately | 3 minutes | "Your caller tune has been activated. It will reflect in the next 10 minutes." |
| 4. Customer reports weak network in home area | Estimated Resolution | Register complaint, forward to technical team | 24 hours | "Our technical team will check your area network. It may take up to 24 hours." |
| 5. Customer requests new SIM replacement | Estimated Resolution | Process request, courier SIM to customer | 2–3 working days | "Your SIM will be delivered within 3 days. Here is your reference number." |
| 6. Customer asks for refund of wrong recharge | Estimated Resolution | Raise refund request to billing team | 48 hours | "I have raised your refund request. The amount will be credited within 48 hours." |
| 7. Customer requests address change | Estimated Resolution | Update needs verification, send request to backend | 72 hours | "Your address change request will be completed in 3 days. You'll receive an SMS." |

## 2.3.4 Prioritizing Customer Interactions Based on Urgency

In a call centre, not all customer queries and complaints are equally urgent. Some issues, such as a lost SIM or a network outage, require immediate attention, while others, like requests for new offers or address changes, can be handled within a longer timeframe. Prioritizing customer interactions helps ensure that critical problems are resolved first, customer satisfaction is maintained, and organizational guidelines or Service Level Agreements (SLAs) are followed. The process involves listening carefully to the customer, identifying the urgency level of the issue, checking organizational guidelines, and then taking action accordingly. Critical issues are either resolved immediately or escalated to higher teams, whereas less urgent matters are addressed within the defined resolution time. Communicating clearly with the customer about expected resolution times is also an essential part of prioritization, as it builds trust and manages expectations effectively.

**Examples of Prioritizing Customer Queries and Complaints**

| Customer Query/Complaint | Urgency Level | Action by Agent (as per guidelines) | Resolution Timeline |
|---|---|---|---|
| Customer reports SIM lost | Critical | Block SIM immediately to prevent misuse, initiate replacement | Within 15 minutes |
| Customer complains network outage | Critical | Raise to technical team immediately, provide reference number | Within 1 hour |
| Customer requests wrong recharge refund | High | Register complaint, escalate to billing team | Within 48 hours |
| Customer reports slow internet speed | High | Troubleshoot, raise ticket if issue persists | 24–48 hours |
| Customer requests activation of caller tune | Medium | Process directly through system | Within 10 minutes |
| Customer asks about latest recharge offers | Low | Provide information politely | Immediately on call/chat |
| Customer requests address change | Low/Medium | Register request, inform customer about verification process | 72 hours |

## 2.3.5 Escalation Procedures and Seeking Guidance

In a call centre, not every customer query or complaint can be resolved immediately by the agent. Some issues may require special permissions, technical expertise, or higher-level intervention. In such cases, it is important to follow the escalation procedure defined by the organization. Escalation ensures that unresolved queries are handled efficiently, prevents delays in service, and maintains customer satisfaction.

The process of escalation involves identifying the unresolved issue, checking the organizational guidelines to determine the appropriate level of escalation, and then communicating the issue clearly to the supervisor or concerned team. While escalating, it is important to provide all relevant details such as the customer's query, actions already taken, reference numbers, and any deadlines. This helps supervisors understand the situation quickly and take appropriate action. Additionally, keeping the customer informed about the escalation and expected resolution time is essential to maintain transparency and trust.

Following escalation procedures also allows agents to seek guidance for issues they are not trained or authorized to handle, ensuring that problems are resolved without unnecessary delays or errors.

**How to Follow Escalation Procedures**

| Step | Action | Example/Dialogue |
|---|---|---|
| 1. Identify unresolved query | Determine if the issue cannot be solved at your level | “The customer’s SIM is blocked due to a system error that I cannot override.” |
| 2. Check escalation guidelines | Refer to SOPs or organizational instructions for escalation | “According to SOP, SIM-related technical errors should be escalated to the Technical Team Lead.” |
| 3. Communicate to supervisor/team | Provide complete details of the issue and actions already taken | “I have received a complaint from Mr. Sharma (Ref #12345). His SIM is blocked, and I attempted a reset, but it requires technical intervention. Please advise.” |
| 4. Record escalation | Note down the reference number or log in CRM | Enter escalation in CRM or ticketing system for tracking |
| 5. Inform the customer | Politely explain the escalation and provide estimated resolution time | “I have escalated your issue to our Technical Team. You will receive a resolution within 24 hours, and here is your reference number to track it.” |
| 6. Follow up | Track the progress and update the customer once resolved | “Your SIM issue has been resolved. Thank you for your patience.” |

## 2.3.6 Coordinating with Relevant Departments for Timely Resolution

As a Telecom Customer Care Executive, you often encounter customer queries or complaints that cannot be resolved independently. Some issues may require input from technical teams, billing departments, network teams, or other specialized units. Coordinating effectively with the relevant departments ensures that customer concerns are resolved quickly and accurately, maintaining service quality and customer satisfaction.

The process involves identifying the department responsible for the issue, communicating the details clearly, tracking the progress, and keeping the customer informed about the status and expected resolution time. Proper coordination avoids delays, prevents miscommunication, and ensures the organization meets its Service Level Agreements (SLAs).

For effective coordination, it is important to follow organizational guidelines, use the available communication channels (like CRM systems, emails, internal chat, or calls), and maintain records of all actions taken. This also helps in following up with departments and providing timely updates to customers.

**Methods for Coordinating with Other Departments**

| Method | Description / Example |
|---|---|
| Internal CRM/Ticketing System | Raise tickets or log issues in the system with all customer details. Track status and follow up regularly.<br>Example: Logging a network outage complaint in the technical ticketing system. |
| Email Communication | Send detailed emails to relevant departments with all necessary information and attachments.<br>Example: Emailing the billing team about a wrong recharge or refund request. |
| Phone or Internal Calls | Directly contact the concerned department or team lead to explain urgent issues.<br>Example: Calling the technical team for a critical SIM-block issue. |
| Internal Chat / Messaging Tools | Use approved messaging platforms to quickly share information and updates.<br>Example: Sending a chat message to the network team for real-time updates on service outages. |
| Escalation to Supervisor / Team Lead | If the issue is complex or urgent, escalate to supervisor for faster coordination.<br>Example: Escalating a pending customer complaint that requires cross-department approval. |
| Follow-up and Tracking | Continuously monitor the status of the request or complaint and provide updates to the customer.<br>Example: Checking the CRM ticket daily until the technical issue is resolved and informing the customer. |

## Notes

GOVERNMENT OF INDIA
MINISTRY OF SKILL DEVELOPMENT & ENTREPRENEURSHIP

# 3. Handling Inbound & Outbound Calls for Service and Sales

Telecom Sector Skill Council

Unit 3.1 - Professional Call Handling and Service Quality

Unit 3.2 - Customer Data Management and Sales Opportunities

Unit 3.3 - Documentation and Inter-Department Coordination

TEL/N0101

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the importance of following standard calling scripts and tele calling guidelines to maintain service quality and compliance.
2. Demonstrate how to handle inbound and outbound calls professionally using standard calling scripts and tele calling guidelines.
3. Describe professional techniques for handling inbound and outbound calls effectively while addressing customer needs.
4. Demonstrate how to handle inbound and outbound calls professionally using standard calling scripts and tele calling guidelines.
5. Discuss key call handling metrics such as Average Call Handling Time (ACHT), Average Hold Time (AHT), and Turnaround Time (TAT) to enhance efficiency.
6. Show how to manage call handling time efficiently while adhering to ACHT, AHT, and TAT guidelines.
7. Elucidate the process of collecting and verifying customer data for service and sales interactions.
8. Demonstrate the process of collecting and verifying customer data during service and sales interactions.
9. Explain methods to identify potential sales opportunities by analyzing customer usage patterns and preferences.
10. Show how to identify potential sales opportunities by analyzing customer usage patterns and preferences.
11. Describe how to present telecom products and services by explaining Features, Advantages, and Benefits (FABs) to customers.
12. Demonstrate how to present telecom products and services using the Features, Advantages, and Benefits (FAB) approach.
13. Discuss techniques for offering customized solutions to customers based on their needs and preferences.
14. Show how to offer customized solutions to customers based on their needs.
15. Explain best practices for documenting customer feedback, inquiries, and complaints accurately in CRM systems.
16. Demonstrate proper documentation of customer feedback, inquiries, and complaints in CRM systems.
17. Enlist coordination methods with sales and marketing teams for effective lead management and follow-ups.
18. Show how to coordinate with sales and marketing teams for lead management and follow-ups.

# UNIT 3.1: Professional Call Handling and Service Quality

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the importance of following standard calling scripts and tele-calling guidelines to maintain service quality and compliance.
2. Demonstrate how to handle inbound and outbound calls professionally using standard calling scripts and tele-calling guidelines.
3. Describe professional techniques for handling inbound and outbound calls effectively while addressing customer needs.
4. Discuss key call handling metrics such as Average Call Handling Time (ACHT), Average Hold Time (AHT), and Turnaround Time (TAT) to enhance efficiency.
5. Show how to manage call handling time efficiently while adhering to ACHT, AHT, and TAT guidelines.

## 3.1.1 Importance of Following Standard Calling Scripts and Tele-Calling Guidelines

In a call centre, maintaining service quality and compliance is essential for ensuring a consistent customer experience and protecting the organization from errors or regulatory issues. Standard calling scripts and tele-calling guidelines provide a structured approach for handling both inbound and outbound calls.

- Communicate accurate information consistently.
- Maintain professional tone and politeness throughout the conversation.
- Cover all required points, including verification, solutions, and compliance statements.
- Reduce errors, misunderstandings, or omissions that could affect customer satisfaction or legal compliance.
- Improve efficiency by guiding the conversation in a logical sequence.

Guidelines also help agents manage calls professionally, including greetings, call handling etiquette, verification processes, escalation procedures, and closing the call politely. This standardization ensures uniform service quality across all agents and interactions.

**Handling Inbound and Outbound Calls Professionally**

**Inbound Calls**

1. Greeting: Answer the call promptly and politely.
   - **Example:** “Good morning! Thank you for calling XYZ Telecom. My name is Priya. How may I assist you today?”
2. Verification: Confirm customer details as per company policy.
3. Identify the Query/Issue: Listen carefully and ask clarifying questions.

4. **Provide Solution or Information:** Use the script to give accurate details or guide the customer.
5. **Escalation if Needed:** Follow the escalation procedure for unresolved issues.
6. **Closure:** Confirm resolution and thank the customer.
   - Example: "I'm glad I could help. Your issue has been resolved. Thank you for calling XYZ Telecom. Have a great day!"

**Outbound Calls**

1. Introduction: Introduce yourself and the purpose of the call clearly.
   - **Example:** "Hello, this is Rahul from XYZ Telecom. I am calling to inform you about your new recharge plan options."
2. Verify Customer Details: Ensure you are speaking to the correct person.
3. Provide Information or Offer Services: Follow the approved script for promotions, surveys, or reminders.
4. Handle Objections or Questions: Respond politely using the guidelines.
5. Closure: Confirm next steps, thank the customer, and end the call professionally.
   - **Example:** "Thank you for your time. If you choose the plan, you will receive confirmation shortly. Have a nice day!"

## 3.1.2 Professional techniques for handling inbound and outbound calls effectively while addressing customer needs

Professional techniques for handling both inbound and outbound calls are essential for a positive customer experience. While both require excellent communication, the approach for each type of call is slightly different.

**Inbound Call Techniques**

Inbound calls are initiated by the customer, meaning they are reaching out with a specific need, question, or problem. The focus here is on listening and understanding.

- **Prompt and Positive Greeting:** Answer the call within two to three rings with a friendly and professional greeting. State your name and the company name. For example, "Hello, this is Alex from Acme Inc. How can I help you today?"
- **Active Listening:** Let the customer fully explain their reason for calling without interruption. Use verbal cues like "I see," or "Go on," to show you're engaged. This prevents you from making assumptions and ensures you address their actual need.
- **Empathize and Acknowledge:** Show empathy by acknowledging their situation, especially if they are upset or frustrated. This builds rapport and de-escalates tension. Use phrases like, "I understand your frustration with this issue," or "I'm sorry to hear that happened."
- **Confirm Understanding:** Before providing a solution, rephrase the customer's problem to confirm you've understood it correctly. For instance, "Just to be clear, you're looking for an update on your order status, is that right?"

- **Offer Solutions and Take Action:** Based on your understanding, provide clear, concise solutions. If you need to put them on hold, ask for their permission first and provide a time estimate. Once the issue is resolved, confirm the customer is satisfied before ending the call.

**Outbound Call Techniques**

Outbound calls are initiated by you, the representative, often for purposes like follow-ups, sales, or information gathering. The focus is on being prepared and respectful of the customer's time.

- **Be Prepared:** Before making the call, have all relevant customer information and the purpose of your call ready. Know exactly what you need to discuss to make the conversation efficient.
- **Clear Introduction:** Begin the call by introducing yourself and your company. Immediately state the purpose of your call clearly and concisely. For example, "Hello, my name is Chris with Tech Solutions. I'm calling to follow up on the support ticket you submitted last week."
- **Check for Availability:** Respect the customer's time by asking if it's a good time to talk. If they are busy, offer to call back at a more convenient time. This simple act shows consideration. "Is now a good time to speak?"
- **Maintain a Positive and Confident Tone:** Your tone should be positive and professional. Speak clearly and at a moderate pace. Sounding confident and knowledgeable makes the customer feel secure in your ability to help them.
- **Provide a Clear Call to Action:** Conclude the call by summarizing what was discussed and stating the next steps. For example, "I've sent you the instructions via email. Please let me know if you have any questions. Have a great day!"

## 3.1.3 Common Call Centre Metrics and adherence to the guidelines

1. **Average Call Handle Time (ACHT) / Average Handling Time (AHT)**
    - **Definition:** The average duration of a customer interaction, including Talk Time, Hold Time, and After-Call Work (Wrap Time).
    - **Formula:**

$$\text{Average Handling Time (AHT)} = \frac{(\text{Total Talk Time} + \text{Total Hold Time} + \text{Total Wrap Time})}{\text{Number of Calls Handled}}$$

- **Important Note:** Reducing ACHT must never compromise call quality or customer service. The goal is to find the right balance—efficient handling + quality engagement.

In a call centre, efficiently managing call handling time is crucial to meet Average Call Handling Time (ACHT/AHT) and Turnaround Time (TAT) guidelines, while still providing quality service to customers. Efficient call handling ensures that more customers are assisted in less time without compromising the accuracy or quality of service.

**To manage call handling time effectively, agents should:**

1. Prepare before the call: Have all necessary tools, systems, and information ready to minimize delays during the conversation.
2. Follow standard scripts: Using approved scripts ensures that all key points are covered systematically, reducing the need for repeated explanations.
3. Listen actively and understand the issue quickly: Identify the customer's concern early to provide a solution without unnecessary back-and-forth.
4. Use hold time wisely: Only place customers on hold when necessary, and minimize hold time to maintain service efficiency.
5. Handle wrap-up (after-call work) efficiently: Complete documentation, logging, or ticket updates promptly after the call.
6. Prioritize and escalate appropriately: For complex issues that cannot be resolved immediately, escalate to the relevant department to avoid exceeding TAT while keeping the customer informed.
7. Avoid unnecessary conversation or delays: Stay professional but concise to maintain efficiency.

By following these practices, agents can meet ACHT/AHT targets, reduce customer wait times, and ensure that TAT for complaints or requests is maintained within SLA limits.

| Step | Action | Impact on ACHT/AHT/TAT |
|---|---|---|
| 1. Preparation | Gather customer details, account info, and system access | Reduces talk time and hold time |
| 2. Use script | Follow approved call flow | Ensures no steps are missed; saves time |
| 3. Active listening | Quickly understand the query | Minimizes back-and-forth and call duration |
| 4. Efficient hold | Place on hold only when required | Reduces Average Hold Time (AHLDT) |
| 5. Prompt wrap-up | Log issue or update CRM immediately | Keeps TAT within SLA |
| 6. Escalation if needed | Forward unresolved issues to correct department | Avoids delays and ensures timely resolution |
| 7. Clear closure | Confirm resolution with customer | Prevents repeat calls, improving overall efficiency |

## Notes

# UNIT 3.2: Customer Data Management and Sales Opportunities

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Elucidate the process of collecting and verifying customer data for service and sales interactions.
2. Demonstrate the process of collecting and verifying customer data during service and sales interactions.
3. Explain methods to identify potential sales opportunities by analyzing customer usage patterns and preferences.
4. Show how to identify potential sales opportunities by analyzing customer usage patterns and preferences.
5. Describe how to present telecom products and services by explaining Features, Advantages, and Benefits (FABs) to customers.
6. Demonstrate how to present telecom products and services using the Features, Advantages, and Benefits (FAB) approach.
7. Discuss techniques for offering customized solutions to customers based on their needs and preferences.
8. Show how to offer customized solutions to customers based on their needs.

## 3.2.1 Collecting and Verifying Customer Data for Service and Sales Interactions

In service and sales interactions, accurate customer data is critical for providing personalized solutions, building trust, and ensuring compliance with company policies and legal requirements. The process of collecting and verifying customer data involves systematic steps to ensure the information is reliable and complete.

**1. Collecting Customer Data**

Customer data can be collected during interactions using various methods:

- **Direct questioning:** Politely ask customers for their details such as name, contact information, address, and preferences.
- **Using forms or digital platforms:** Collect information through CRM forms, web portals, or mobile applications.
- **Observing behavior:** Track customer interactions, purchase history, and feedback patterns to gain insights.
- **Third-party sources:** Obtain additional data from authorized data brokers, ensuring compliance with data privacy regulations.

**2. Verifying Customer Data**

Once data is collected, it must be verified for accuracy and completeness:

- **Cross-check information:** Compare the provided data with existing records in CRM systems or official documents.

- **Confirm with the customer:** Politely confirm details such as phone numbers, addresses, and email IDs during the interaction.
- **Validate authenticity:** Ensure sensitive information like payment or identification details is legitimate and secure.

## 3.2.2 Identifying Potential Sales Opportunities through Customer Usage Patterns and Preferences

Understanding customer behavior is key to uncovering potential sales opportunities. By analyzing usage patterns and preferences, businesses can identify products or services that are likely to interest individual customers, enabling personalized recommendations and improved sales performance.

**1. Methods to Identify Sales Opportunities**

a) Analyzing Purchase History:

- Review what products or services the customer has previously bought.
- Identify trends such as frequently purchased items or seasonal buying patterns.
- Example: A customer frequently buying prepaid recharge packs may be interested in premium data plans.

b) Monitoring Service Usage Patterns:

- Track how customers use existing products or services.
- Look for underutilized services or features that can be upgraded.
- Example: A customer using basic internet services could be offered a higher-speed plan based on usage patterns.

c) Collecting Customer Feedback and Preferences:

- Use surveys, ratings, or direct feedback to understand customer interests.
- Identify areas where customers express a desire for additional services or improvements.

d) Segmenting Customers:

- Group customers based on demographics, purchase behavior, and preferences.
- Tailor marketing campaigns and recommendations to each segment for higher conversion.

e) Leveraging CRM and Analytics Tools:

- Use CRM software to analyze historical interactions, complaints, and inquiries.
- Predict potential needs or upsell/cross-sell opportunities based on patterns detected.

**2. Identifying Sales Opportunities**

- Collect Data: Pull customer information from CRM, including past purchases, service usage, and feedback.
- Analyze Patterns: Examine frequency, timing, and type of usage to detect trends.
- Identify Gaps or Needs: Spot products or services the customer has not yet availed but may benefit from.

- Make Recommendations: Suggest relevant products or services tailored to the customer's usage and preferences.
- Follow-Up: Track the effectiveness of recommendations and refine strategies based on customer response.

## 3.2.3 Presenting Telecom Products and Services Using the Features, Advantages, and Benefits (FAB) Approach

Identifying the various USPs (Unique Selling Points), advantages, and benefits of a product or service is essential for creating effective sales and marketing messages. The Features, Advantages, and Benefits (FAB) technique is a proven method that helps telecom executives explain why a customer should choose a particular product or service. It connects product details with customer needs, making the sales pitch more persuasive and customer-focused.

**1. Understanding FAB Statements**

- **Features (F):**
  Specific characteristics or technica
  Example: "This plan offers unlimite
- **Advantages (A):**
  How the feature adds functional v
  Example: "You don't have to worr
- **Benefits (B):**
  The real value or outcome the customer experiences. This connects directly to customer needs and lifestyle.
  Example: "You can stay connected with family and friends anytime without worrying about costs."

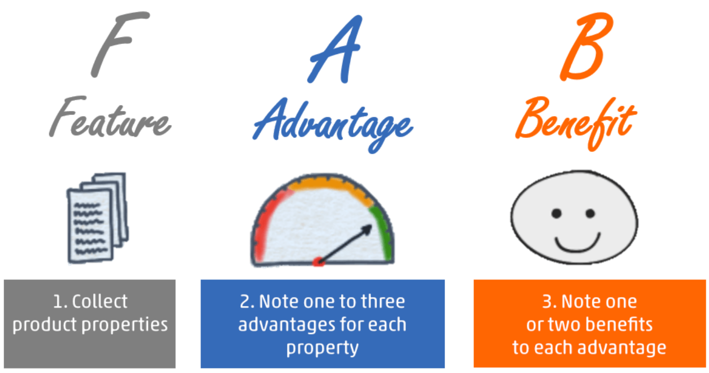


Fig. 3.2.1 FAB Statement

Together, these statements move from what the product has, to why it's useful, to how it improves the customer's life.

**2. Steps to Create FAB Statements**

- **Step 1:** List all features of the product/service.
- **Step 2:** For each feature, identify one or more advantages.
- **Step 3:** Put yourself in the customer's shoes and highlight the benefit that matters most to them.

"Some executives start with the benefit (what matters most to the customer) and then explain the advantage and feature that supports it. This works well for customers who are less technical and more focused on outcomes."

**3. Applying FAB to Telecom Products**

Example 1 – Mobile Phone with Gorilla Glass

- **Feature:** The phone comes with Gorilla Glass 3.
- **Advantage:** The screen is protected from scratches and accidental damage.
- **Benefit:** The customer enjoys peace of mind while traveling or carrying the phone with keys and coins, ensuring the screen remains clean and long-lasting.

**Example 2 – Telecom Data Plan**

- **Feature:** High-speed 4G/5G data with unlimited usage.
- **Advantage:** Seamless browsing, streaming, and downloading without interruption.
- **Benefit:** Customers can work, study, or enjoy entertainment on the go without worrying about slow speeds or data exhaustion.

**Example 3 – Broadband Connection**

- **Feature:** 24/7 customer support with quick issue resolution.
- **Advantage:** Any service disruption can be addressed immediately.
- **Benefit:** Customers save time, avoid frustration, and enjoy uninterrupted internet for work or leisure.

**4. Importance of FAB in Sales Interactions**

- Helps executives stay focused and structured during product presentations.
- Makes communication customer-centric by linking product features to actual needs.
- Builds trust by showing how the service adds real value.
- Increases conversion rates by highlighting benefits that matter most to the buyer (such as cost savings, reliability, or convenience).

## 3.2.4 Offering Customized Solutions to Customers Based on Their Needs and Preferences

Providing customized solutions helps build stronger relationships, enhances customer satisfaction, and increases loyalty. In telecom and service industries, tailoring solutions ensures that products and services align closely with a customer's lifestyle, usage habits, and expectations.

**Techniques for Offering Customized Solutions**

1. **Active Listening and Probing Questions**
   - Listen carefully to understand customer needs, challenges, and preferences.
   - Ask probing questions like: "How often do you use the internet for work or entertainment?"
   - "Do you prefer prepaid flexibility or postpaid consistency?"

2. **Customer Profiling and Segmentation**
   - Use CRM data to categorize customers based on demographics, purchase history, and usage behavior.
   - Offer solutions that match each customer's profile (e.g., students, professionals, families).

3. Usage Pattern Analysis
   - Track call frequency, data consumption, recharge cycles, or service complaints.
   - Recommend upgrades or additional services based on observed trends.
4. Highlight Relevant Features, Advantages, and Benefits (FAB)
   - Focus on features that directly address the customer's pain points.
   - Emphasize benefits that add value to their personal or professional life.
5. Personalized Communication
   - Avoid generic sales pitches. Instead, use the customer's name and refer to their specific needs.
   - Example: "Since you travel frequently, our international roaming plan may suit you better."
6. Flexibility and Options
   - Present 2–3 tailored choices so customers feel in control.
   - Example: Offer a "work-from-home" broadband package vs. a "family entertainment" package.
7. Follow-Up and Feedback
   - After offering a solution, check customer satisfaction.
   - Use feedback to refine future recommendations.

**How to Offer Customized Solutions**

**Scenario 1 – Customer Needing More Data:**

**Step 1**: Ask about their current usage: "Do you mainly use data for streaming or for work?"

**Step 2:** Identify the gap: The customer often runs out of data mid-month.

**Step 3:** Offer solution: "Based on your usage, I'd recommend upgrading to our 50GB monthly data **plan. This ensures uninterrupted streaming and video calls."**

**Scenario 2 – Family Customer Looking for Value:**

**Step 1:** Understand their need: They want affordable services for multiple family members.

**Step 2:** Identify opportunity: They recharge each number separately.

**Step 3:** Offer solution: "Instead of multiple recharges, our family pack allows 4 connections under one plan with unlimited calls and data sharing. It's more cost-effective and convenient."

**Scenario 3 – Business Customer Seeking Reliability:**

**Step 1:** Ask about work requirements: "Do you rely on video calls or remote access frequently?"

**Step 2:** Identify issue: They face downtime with basic broadband.

**Step 3:** Offer solution: "Our business-grade broadband with dedicated support ensures minimal downtime and priority issue resolution, helping your work run smoothly."

By carefully understanding customer needs and preferences, analyzing their usage behavior, and applying the FAB approach, executives can offer customized solutions that are both relevant and valuable. This not only improves customer satisfaction but also strengthens long-term business relationships.

**Role-Play Activity: Offering Customized Solutions**

| Scenario | Customer Concern | Executive Dialogue |
|---|---|---|
| 1. Data Usage Customer | “I keep running out of mobile data before the end of the month.” | - Executive: “I understand, thank you for sharing. May I ask how you mainly use your data – for work, browsing, or streaming videos?”<br>- Customer: “Mostly streaming and online classes.”<br>- Executive: “Based on that, I suggest upgrading to our 50GB monthly plan. It offers faster speeds and enough data to cover your streaming and classes without interruptions. This means you won’t need to recharge repeatedly, saving you both time and money.” |
| 2. Family Customer | “We have four family members, and I recharge each number separately. It’s expensive.” | - Executive: “I see. May I ask how much you usually spend on recharges for all four members?”<br>- Customer: “Around ₹1,200 a month.”<br>- Executive: “Instead of multiple recharges, I recommend our Family Pack plan. It allows 4 numbers under one connection, with unlimited calls and data sharing. This reduces your monthly expense and makes it easier to manage with a single recharge.” |
| 3. Business Professional | “I work from home, and internet downtime is a big problem for me.” | - Executive: “Thank you for sharing. Do you rely more on video calls, large file transfers, or both?”<br>- Customer: “Mostly video calls for meetings.”<br>- Executive: “In that case, our Business Broadband plan would be ideal. It provides higher speed and comes with priority support, so any issues are resolved quickly. This will ensure your meetings run smoothly without interruptions.” |

## Notes

# UNIT 3.3: Documentation and Inter-Department Coordination

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain best practices for documenting customer feedback, inquiries, and complaints accurately in CRM systems.
2. Demonstrate proper documentation of customer feedback, inquiries, and complaints in CRM systems.
3. Enlist coordination methods with sales and marketing teams for effective lead management and follow-ups.
4. Show how to coordinate with sales and marketing teams for lead management and follow-ups.

## 3.3.1 Customer Feedback and Its Importance

**Definition:**

Feedback is organized information collected from customers about their opinions, suggestions, and experiences regarding a product or service.

**Importance of Customer Feedback**

1. Understanding Customer Perceptions: Customer feedback helps telecom companies understandhow customers rate their products or services in comparison to competitors.

   **Example:** Customers may prefer the network coverage of ABC Telecom over XYZ Telecom. This signals XYZ Telecom to improve its coverage to meet customer expectations.
2. Identifying Strengths and Weaknesses: Feedback highlights where a company's products and services excel and where they fall short. This comparison with both customer expectations and competitor performance allows companies to take corrective measures.
3. Evaluating Customer Service: Feedback enables telecom companies to assess how effectively employees interact with and support customers.
   - Customer Satisfaction Surveys are widely used to determine whether customer issues are being resolved and queries answered satisfactorily.
   - If multiple surveys mention that certain representatives are rude or unhelpful, the company can provide training or corrective action to improve service quality.
4. Driving Continuous Improvement: By listening to customers regularly, telecom companies can refine their offerings, improve service delivery, and build long-term trust and loyalty.

## 3.3.2 Documenting Customer Feedback, Inquiries, and Complaints in CRM Systems

Accurate documentation of customer interactions is essential for maintaining service quality, resolving issues efficiently, and improving customer experience. CRM (Customer Relationship Management) systems help organize, track, and analyze these interactions systematically.

**Best Practices for Documenting Customer Feedback, Inquiries, and Complaints**

1. **Record Information Promptly:**
   - Document feedback, inquiries, or complaints immediately after the interaction to avoid missing details.
2. **Be Clear and Concise:**
   - Use simple, precise language. Avoid jargon or abbreviations that may confuse other team members.
3. **Capture Relevant Details:**
   - Include the customer's name, contact information, account number, product/service in question, and interaction date/time.
   - For complaints or inquiries, include the issue description, cause if known, and urgency level.
4. **Categorize Correctly:**
   - Tag the interaction as feedback, inquiry, or complaint.
   - Assign appropriate categories or subcategories (e.g., billing, network issue, technical support) for easier reporting and tracking.
5. **Use CRM Fields Consistently:**
   - Fill all mandatory fields in the CRM to ensure completeness.
   - Follow company standards for notes and descriptions to maintain uniformity.
6. **Document Actions Taken:**
   - Record the steps taken to resolve the issue, including follow-ups, escalations, or commitments to the customer.
7. **Maintain Professional Tone:**
   - Use neutral and factual language. Avoid personal opinions or emotional expressions.
8. **Update Status Regularly:**
   - Keep the CRM updated with the latest status, whether the issue is resolved, pending, or escalated.

**Proper Documentation in CRM Systems**

| Customer Interaction | CRM Documentation Example |
|---|---|
| Feedback | - Customer Name: Ramesh Kumar<br>- Contact: 9876543210<br>- Product: 4G Mobile Data Plan<br>- Feedback: Appreciates uninterrupted network coverage in rural areas.<br>- Date/Time: 02/10/2025, 11:30 AM<br>- Action Taken: Logged for performance recognition.<br>- Category: Feedback |

| | |
|---|---|
| Inquiry | - Customer Name: Priya Sharma<br>- Contact: 9123456780<br>- Product: Postpaid Plan<br>- Inquiry: Wants information about international roaming charges.<br>- Date/Time: 02/10/2025, 01:15 PM<br>- Action Taken: Provided details and sent brochure via email.<br>- Category: Inquiry |
| Complaint | - Customer Name: Anil Verma<br>- Contact: 9988776655<br>- Product: Broadband Service<br>- Complaint: Internet speed is consistently below plan limit.<br>- Date/Time: 02/10/2025, 03:00 PM<br>- Action Taken: Escalated to technical support; follow-up scheduled in 24 hours.<br>- Category: Complaint |

**3. Key Tips for CRM Documentation**

- Always double-check customer details before saving records.
- Avoid vague entries like "customer unhappy"; specify the reason clearly.
- Use CRM features like tags, priority markers, and reminders for efficient tracking.
- Ensure all sensitive information is documented securely and complies with data privacy laws.

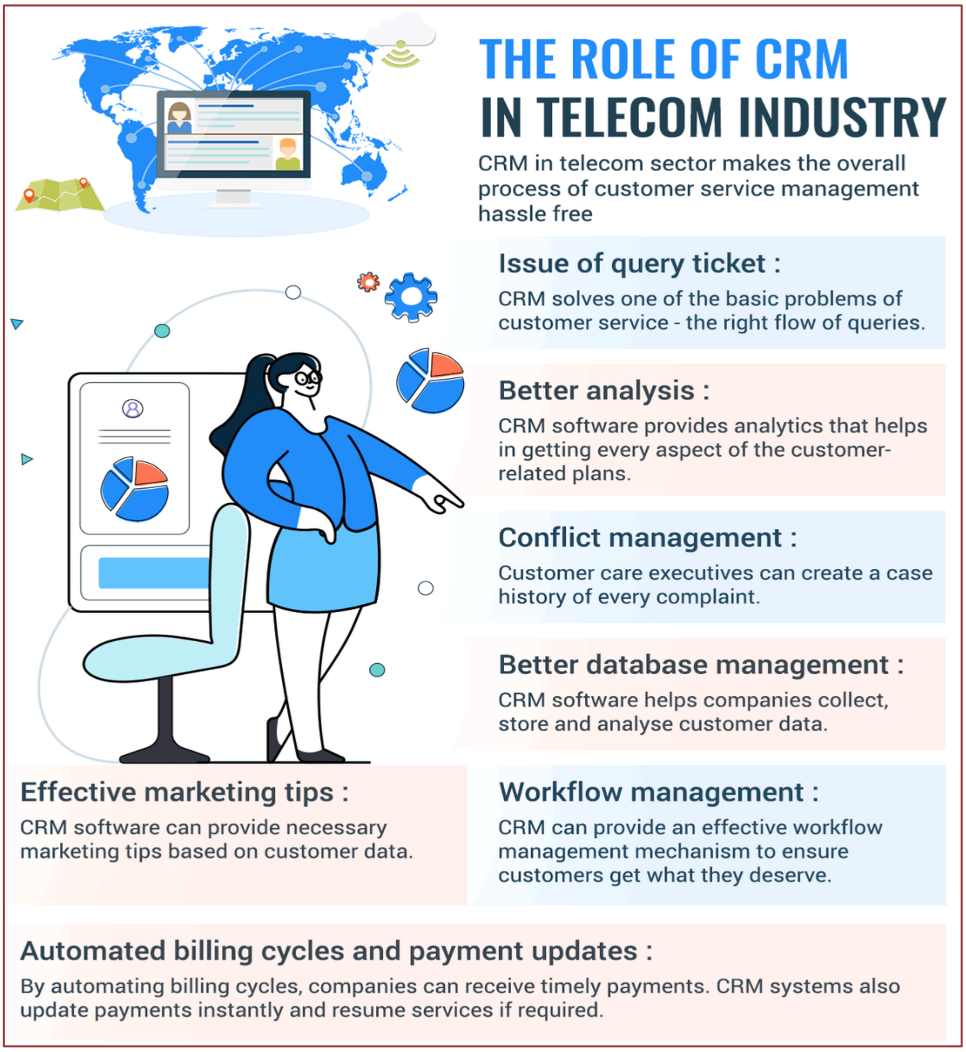


*Fig. 3.3.1 Role of CRM in Telecom*

### 3.3.3 Coordination with Sales and Marketing Teams for Lead Management and Follow-Ups

Effective lead management requires seamless coordination between customer service, sales, and marketing teams. Proper collaboration ensures timely follow-ups, increased conversion rates, and improved customer satisfaction.

**Coordination Methods**

1. **Regular Team Meetings:**
   - Conduct daily or weekly meetings to review leads, discuss high-priority prospects, and share updates on follow-ups.
2. **Shared CRM Systems:**
   - Use a centralized CRM where all teams can access lead information, track follow-ups, and update lead status.
3. **Lead Assignment Protocols:**
   - Define clear rules for assigning leads based on geography, expertise, or product/service type.
4. **Collaborative Communication Channels:**
   - Utilize tools like Slack, Teams, or email threads for instant communication between sales, marketing, and support teams.
5. **Feedback Loop:**
   - Sales and marketing teams provide feedback on lead quality, campaign effectiveness, and customer responses to help refine future lead generation strategies.
6. **Standard Operating Procedures (SOPs):**
   - Maintain documented processes for lead handling, follow-ups, escalation procedures, and reporting.
7. **Performance Tracking and Reporting:**
   - Track lead status, follow-up timelines, and conversion rates to evaluate team efficiency and identify bottlenecks.

**Coordinating for Lead Management and Follow-Ups**

| Step | Action |
|---|---|
| 1. Lead Capture | Marketing team generates leads from campaigns, website forms, or social media. All details are logged into the shared CRM. |
| 2. Lead Assignment | Customer Care or sales manager assigns leads to specific sales executives based on expertise or region. |
| 3. Initial Follow-Up | Sales executive contacts the lead promptly, notes preferences, and updates CRM with interaction details. |
| 4. Collaboration | Customer care informs marketing of lead response, campaign effectiveness, or additional requirements. |

| | |
|---|---|
| 5. Scheduled Follow-Ups | Set reminders in CRM for next interaction; update lead status regularly. |
| 6. Feedback Sharing | Sales and marketing teams share feedback on lead quality, interest level, and conversion opportunities in weekly meetings. |
| 7. Reporting and Analysis | Teams analyze lead progress and conversion metrics to improve future campaigns and coordination. |

Coordinating effectively with sales and marketing teams ensures that leads are managed efficiently, follow-ups are timely, and customer interactions are personalized. Using shared systems, regular communication, and feedback loops strengthens collaboration, enhances conversions, and improves overall business performance.

## Exercise

**Short Questions:**

1. Explain why it is necessary to verify customer data before processing a telecom service request.
2. Describe two techniques to identify sales opportunities from customer usage patterns.
3. What is the significance of documenting customer complaints accurately in CRM systems?

**Multiple Choice Questions:**

1. Why is it important to follow standard calling scripts during customer interactions?
   a) To save time only
   b) To ensure compliance and consistent service quality
   c) To make the call shorter
   d) To avoid listening to customers

2. Which of the following best describes Average Call Handling Time (ACHT)?
   a) The total time a customer waits in the queue
   b) The time taken to complete a customer call including talk time and after-call work
   c) The number of calls received per day
   d) The average waiting time before a call is answered

3. When presenting telecom products using the FAB approach, “Advantages” refers to:
   a) The physical description of the product
   b) The benefits customer will get
   c) The functional superiority over other products
   d) The price comparison with competitors

4. Which of the following is the most professional way to handle an outbound sales call?
   a) Start directly with the product details
   b) Greet politely, verify customer details, and introduce the purpose of the call
   c) Ask personal questions first
   d) End the call quickly without explanation

**True/False Statements**

1. Using a standard calling script ensures consistency in communication across all customer calls.
2. Turnaround Time (TAT) measures the duration taken to complete a customer's issue or request.
3. Collecting customer data is optional during service interactions.
4. Offering customized solutions helps improve customer satisfaction and loyalty.
5. Coordination with sales and marketing teams is not necessary for effective lead management.

**Fill in the Blanks:**

1. _________helps in maintaining service quality and compliance while interacting with customers.
2. Average Hold Time (AHT) refers to the __________.
3. The FAB approach stands for Features, __________, and Benefits.
4. Proper documentation of customer feedback in __________ systems ensures accuracy and better follow-ups.

## Notes

# 4. Customer Engagement and Relationship Building

Unit 4.1 - Professional Customer Interaction and Requirement Analysis

Unit 4.2 - Product Alignment, Promotions, and Sales Transactions

Unit 4.3 - Customer Retention, Complaint Handling, and Service Standards

TEL/N0102

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the importance of professional customer interactions in a telecom showroom to enhance customer satisfaction and retention.
2. Demonstrate how to attend to customers and provide personalized service in a professional manner.
3. Describe how to inquire about customer requirements effectively to understand their product and service needs.
4. Show how to inquire about customer requirements and assess their telecom needs.
5. Discuss techniques for aligning customer needs with suitable telecom products and services.
6. Demonstrate techniques to align customer needs with suitable telecom products and services.
7. Explain various promotions, loyalty programs, and bundled offers, and their benefits for customers.
8. Show how to inform customers about promotions, loyalty programs, and bundled offers effectively.
9. Describe the process of guiding customers in selecting the right products and services based on their preferences.
10. Demonstrate the process of guiding customers in selecting the right telecom products and services.
11. Elucidate the key steps involved in processing sales transactions, issuing invoices, and ensuring accurate billing.
12. Show how to process sales transactions, issue invoices, and ensure accurate billing.
13. Explain the role of follow-up interactions in building long-term customer relationships and increasing customer loyalty.
14. Demonstrate customer follow-up techniques to ensure satisfaction and build long-term relationships.
15. Enlist best practices for handling customer complaints and query escalation as per organizational standards.
16. Show how to handle customer complaints and escalate queries in accordance with company policies.
17. Discuss the significance of adhering to Service Level Agreements (SLAs) and maintaining response time standards.

# UNIT 4.1: Professional Customer Interaction and Requirement Analysis

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the importance of professional customer interactions in a telecom showroom to enhance customer satisfaction and retention.
2. Demonstrate how to attend to customers and provide personalized service in a professional manner.
3. Describe how to inquire about customer requirements effectively to understand their product and service needs.
4. Show how to inquire about customer requirements and assess their telecom needs.

## 4.1.1 Professional Customer Interactions in a Telecom Showroom

Professional customer interactions are crucial in a telecom showroom, as they directly impact customer satisfaction, loyalty, and brand reputation. Providing personalized and courteous service helps create a positive experience that encourages repeat business and referrals.


*Fig. 4.1.1 Customer interaction at a telecom store*

**Importance of Professional Customer Interactions**

1. Enhances Customer Satisfaction:
   - Courteous and attentive behavior ensures customers feel valued and understood.
   - Professional guidance helps customers make informed choices about products and services.

2. Builds Customer Trust and Loyalty:
    - Demonstrating product knowledge and providing honest recommendations fosters trust.
    - Customers are more likely to return to a showroom where they are treated respectfully.
3. Encourages Positive Word-of-Mouth:
    - Satisfied customers share their experiences with friends and family, improving the company's reputation.
4. Improves Sales Performance:
    - Professional service combined with personalized recommendations increases conversion rates.
5. Reduces Complaints and Conflicts:
    - Clear communication and active listening help prevent misunderstandings and dissatisfaction.

**Techniques to Attend to Customers Professionally and Provide Personalized Service**

1. Warm and Courteous Greeting:
    - Welcome each customer promptly and politely.
    - Example: "Good morning! Welcome to ABC Telecom. How may I assist you today?"
2. Active Listening and Understanding Needs:
    - Ask open-ended questions to identify the customer's requirements.
    - Example: "Are you looking for a new mobile plan, or do you need assistance with your current service?"
3. Demonstrating Product Knowledge:
    - Explain features, advantages, and benefits (FAB) of products relevant to the customer's needs.
    - Show demos of devices, apps, or services if applicable.
4. Providing Personalized Recommendations:
    - Suggest products or plans based on usage patterns, preferences, or budget.
    - Example: Offering a family plan to a customer with multiple lines or a high-data plan to a frequent internet user.
5. Professional Body Language and Tone:
    - Maintain eye contact, smile, and use polite language.
    - Avoid appearing rushed or distracted.
6. Handling Queries and Complaints Efficiently:
    - Listen carefully, provide accurate information, and resolve issues promptly.
    - Escalate to supervisors if necessary, keeping the customer informed throughout.
7. Follow-Up Assistance:
    - Offer guidance on after-sales support, recharge options, or service apps.
    - Example: "If you need help setting up your new phone, our team can assist you anytime."

**Professional Customer Service in a Showroom**

| Step | Action |
|---|---|
| 1. Greeting | Welcome the customer warmly and politely. |
| 2. Needs Assessment | Ask open-ended questions to understand the customer's requirements. |
| 3. Product Presentation | Demonstrate relevant products/services and explain FABs. |

| | |
|---|---|
| 4. Personalized Recommendation | Suggest a plan or product tailored to the customer's usage, preferences, or budget. |
| 5. Handling Questions/Objections | Listen carefully, clarify doubts, and provide accurate information. |
| 6. Closing Interaction | Summarize the solution, offer additional support options, and thank the customer. |

## 4.1.2 Inquiring About Customer Requirements to Assess Telecom Needs

Effectively inquiring about customer requirements is a critical skill for telecom customer care and showroom executives. Understanding the customer's needs allows you to offer personalized solutions, recommend appropriate products and services, and improve customer satisfaction.

**Techniques to Inquire About Customer Requirements**

1. **Active Listening:**
    - Pay full attention to what the customer says without interrupting.
    - Note key details such as current usage, preferences, and challenges.
2. **Ask Open-Ended Questions:**
    - Encourage customers to provide detailed information about their needs.
    - Example: "Can you tell me how you typically use your mobile or internet services?"
3. **Use Probing Questions:**
    - Dive deeper to uncover specific requirements.
    - Example: "Do you mainly use data for work, streaming, or social media?"
4. **Identify Current Pain Points:**
    - Ask about problems faced with current products/services.
    - Example: "Are you satisfied with your current network coverage or data speed?"
5. **Observe Customer Behavior and Preferences:**
    - Note non-verbal cues, device usage patterns, and expressed priorities.
6. **Confirm Understanding:**
    - Summarize what the customer has shared to ensure accuracy.
    - Example: "So, you're looking for a high-speed data plan with unlimited calls, correct?"

**2. Assessing Customer Telecom Needs**

| Step | Action |
|---|---|
| 1. Greeting | Welcome the customer politely. Example: "Good morning! How can I help you with your telecom needs today?" |
| 2. General Inquiry | Ask broad questions to understand the type of service required (mobile, broadband, or bundled services). |
| 3. Detailed Inquiry | Use open-ended and probing questions to uncover specific requirements:<br>- "How many family members will use this plan?"<br>- "Do you often make international calls?" |
| 4. Identify Pain Points | Ask about current challenges with existing products or services.<br>- "Are you experiencing any issues with your current internet speed or call drops?" |
| 5. Confirm Requirements | Repeat the key points shared by the customer to ensure accurate understanding.<br>- "So, you need a plan with high-speed data and uninterrupted network coverage, is that correct?" |
| 6. Proceed to Recommendation | Once requirements are confirmed, suggest products or services that match their needs. |

Effectively inquiring about customer requirements ensures that telecom executives understand the customer's preferences, usage patterns, and pain points. This forms the foundation for providing personalized solutions, improving customer satisfaction, and increasing the likelihood of a successful sale.

## Notes

# UNIT 4.2: Product Alignment, Promotions, and Sales Transactions

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Discuss techniques for aligning customer needs with suitable telecom products and services.
2. Demonstrate techniques to align customer needs with suitable telecom products and services.
3. Explain various promotions, loyalty programs, and bundled offers, and their benefits for customers.
4. Show how to inform customers about promotions, loyalty programs, and bundled offers effectively.
5. Describe the process of guiding customers in selecting the right products and services based on their preferences.
6. Demonstrate the process of guiding customers in selecting the right telecom products and services.
7. Elucidate the key steps involved in processing sales transactions, issuing invoices, and ensuring accurate billing.
8. Show how to process sales transactions, issue invoices, and ensure accurate billing.

## 4.2.1 Aligning Customer Needs with Suitable Telecom Products and Services

Matching customer requirements with the right telecom products or services is essential to provide value, enhance satisfaction, and drive sales. Proper alignment ensures that customers receive solutions that fit their usage patterns, preferences, and budget, while also building trust and loyalty.

**Techniques to Align Customer Needs with Products/Services**

1. Understand Customer Requirements Thoroughly:
   - Use active listening and probing questions to gather information on customer usage, preferences, and challenges.
2. Segment Customers Based on Needs:
   - Categorize customers into segments such as heavy data users, family plans, business users, or budget-conscious customers.
   - This helps in quickly identifying relevant products or services.
3. Apply the Features, Advantages, and Benefits (FAB) Approach:
   - Present products by highlighting features, explain advantages, and connect them to the benefits relevant to the customer's specific needs.
4. Leverage CRM and Past Interaction Data:
   - Review customer history, usage patterns, and previous interactions to suggest products that best match their requirements.
5. Provide Options with Recommendations:
   - Offer 2–3 suitable alternatives, clearly explaining how each meets the customer's needs, enabling informed decision-making.
6. Consider Budget and Preferences:
   - Ensure recommendations are realistic and affordable for the customer while delivering maximum value.

7. Confirm Customer Understanding:
   - Summarize suggested solutions and ask the customer for confirmation before proceeding.

**Aligning Customer Needs with Products/Services**

| Step | Action |
|---|---|
| 1. Gather Requirements | Ask open-ended and probing questions to understand usage patterns, preferences, and challenges. |
| 2. Analyze Needs | Identify customer segment (e.g., heavy data user, family plan, business plan). |
| 3. Match Solutions | Use CRM data and product knowledge to shortlist 2–3 suitable plans or devices. |
| 4. Explain FAB | Present the feature, advantage, and benefit of each option.<br>Example:<br>- Feature: High-speed 5G data plan<br>- Advantage: Faster downloads and uninterrupted streaming<br>- Benefit: Enjoy movies and video calls without interruptions, even during peak hours |
| 5. Discuss Options and Recommendations | Highlight differences and relevance of each option to the customer's needs. |
| 6. Confirm Customer Choice | Repeat the key points and ensure the customer is comfortable with the selected solution. |
| 7. Proceed to Service/Plan Activation | Assist with plan activation, device setup, or contract processing. |

Aligning customer needs with suitable telecom products or services ensures that customers receive solutions tailored to their lifestyle, usage habits, and budget. Using techniques like active inquiry, segmentation, FAB presentation, and CRM insights helps executives provide personalized service, enhance satisfaction, and improve sales outcomes.

## 4.2.2 Communicating Promotions, Loyalty Programs, and Bundled Offers to Customers

Telecom companies use promotions, loyalty programs, and bundled offers to enhance customer engagement, increase retention, and provide added value. For customers, these initiatives offer cost savings, convenience, and exclusive benefits.

**Understanding the Offers**

- Promotions are temporary offers such as discounts, cashback, or seasonal plans. For example, a mobile recharge plan might include 50% extra data for a limited time. Customers benefit by getting more value for the same cost.

- **Loyalty Programs** reward consistent usage or long-term association. These may include reward points, free add-ons, or early access to new services. For instance, a subscriber who regularly renews their plan could earn points that can be redeemed for additional data or movie subscriptions.
- **Bundled Offers** combine multiple services like mobile, broadband, and OTT subscriptions into one package. Customers save money and enjoy the convenience of managing several services under a single plan.

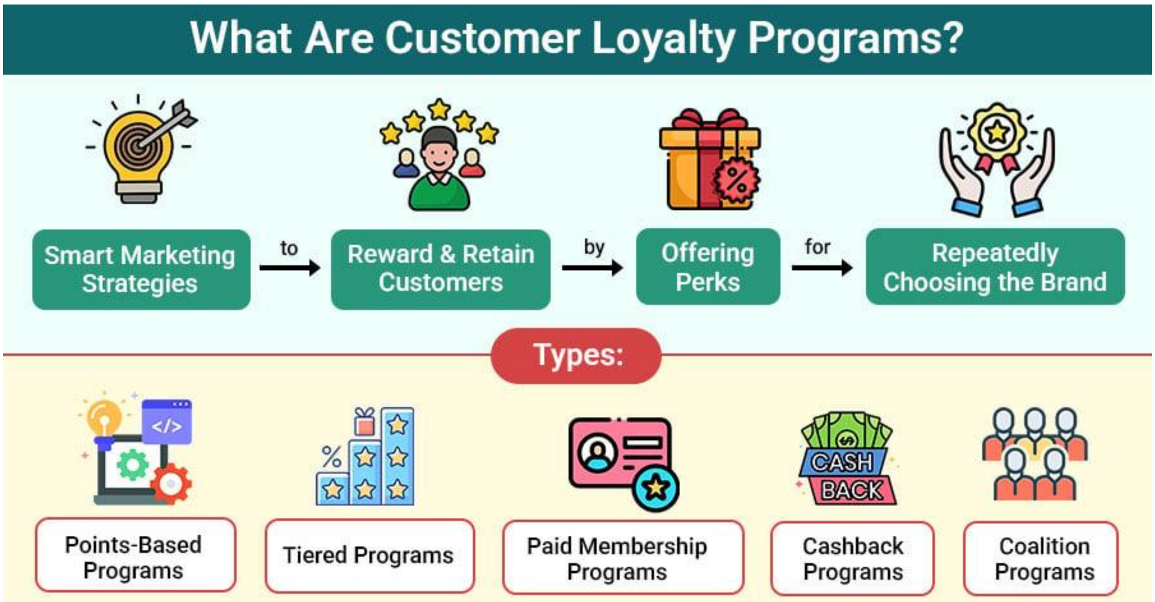


*Fig. 4.2.1 Customer loyalty program and types*

**Techniques for Informing Customers Effectively**

1. Tailor the Message to Customer Needs:
   - Before presenting an offer, understand the customer's usage habits, preferences, and budget. For example, suggesting a family bundle to a customer with multiple lines ensures relevance.
2. Explain the Value Clearly:
   - Emphasize how the offer benefits the customer rather than just listing features. Instead of saying, "This is a 50GB plan," explain: "With 50GB high-speed data, you can stream videos, attend online classes, and make video calls without worrying about running out of data."
3. Compare and Highlight Savings:
   - Help customers see why the promotion is advantageous. Example: "By choosing this bundled plan, you save ₹300 every month compared to subscribing separately to mobile and broadband services."
4. Engage and Confirm Understanding:
   - Ask the customer if they have questions and check whether the offer meets their expectations. Example: "Does this plan meet your current internet and mobile needs?"
5. Assist with Activation:
   - Once the customer is interested, guide them through plan activation or subscription, and provide tips for maximizing benefits.

**Activity**

- A customer enters the showroom looking for a new mobile plan. After understanding that they are a heavy data user, the executive introduces a promotion offering 100GB high-speed data at a discounted rate.
- Using a FAB-style explanation, the executive clarifies:
  - ✓ Feature: 100GB high-speed data
  - ✓ Advantage: Allows uninterrupted streaming and browsing
  - ✓ Benefit: The customer can work and enjoy entertainment without interruptions, saving time and avoiding frustration.

- The executive then mentions a loyalty program where frequent recharge earns points redeemable for OTT subscriptions, and a bundle option combining mobile and broadband to maximize savings.
- The customer is encouraged to ask questions, and the executive assists with immediate plan activation.

**Practice Sheet: Communicating Promotions, Loyalty Programs, and Bundled Offers**

| Scenario | Customer Profile | Trainee Task | Example Approach (FAB) |
|---|---|---|---|
| 1. Heavy Data User | Uses internet extensively for streaming and video calls | Introduce a high-data promotion and explain how it improves the customer's experience | Feature: 100GB high-speed data plan<br>Advantage: Uninterrupted streaming and browsing<br>Benefit: Can attend online meetings and stream videos without interruptions |
| 2. Family Customer | Multiple family members on separate plans | Suggest a bundled family plan and highlight savings | Feature: Family bundle with 4 connections<br>Advantage: All lines managed under one plan<br>Benefit: Saves money and simplifies billing for the household |
| 3. Loyal Customer | Long-term subscriber looking for extra benefits | Introduce loyalty program rewards and explain redemption options | Feature: Earn points for every recharge<br>Advantage: Redeem points for extra data or subscriptions<br>Benefit: Enjoy additional services at no extra cost |
| 4. New Customer Considering Multiple Services | Wants mobile, broadband, and OTT subscriptions | Suggest a bundled offer explaining convenience and cost benefits | Feature: Combined mobile + broadband + OTT package<br>Advantage: Single subscription covers all services<br>Benefit: Saves money and reduces hassle of managing multiple accounts |

## 4.2.3 Guiding Customers in Selecting the Right Telecom Products and Services

In today's competitive telecom market, customers are presented with a wide range of products and services. For a customer care or showroom executive, it is essential to guide customers effectively to select the product or plan that best meets their needs, preferences, and budget. Proper guidance helps customers make informed decisions, enhances satisfaction, and builds long-term trust. Guiding customers effectively involves understanding their needs, presenting suitable options, explaining features and benefits, and assisting in final selection. By applying these steps, telecom executives ensure that customers make informed choices, enhancing satisfaction, trust, and long-term loyalty.

**1. Process of Guiding Customers**

1. Greet and Understand Customer Needs:
    - Begin by welcoming the customer politely and asking open-ended questions.
    - Example: "Good morning! How can I help you with your telecom requirements today?"
    - Probe further: "Do you primarily need this plan for calls, data, or both?"
2. Assess Usage Patterns and Preferences:
    - Understand how the customer uses services, their budget, and priorities.
    - Example: A customer frequently streams videos may need a high-data plan, whereas someone making frequent calls may need a voice-oriented plan.
3. Explain Relevant Options Using Features, Advantages, and Benefits (FAB):
    - Present products in a structured way:
        - ✓ Feature: High-speed 4G/5G internet plan
        - ✓ Advantage: Provides uninterrupted browsing and streaming
        - ✓ Benefit: Allows the customer to attend online meetings, stream videos, or use apps without interruptions
    - Demonstrate devices or plans if possible.
4. Compare Alternatives and Highlight Suitability:
    - Offer 2–3 suitable options and explain which plan best fits the customer's requirements.
    - Example: "Option A gives you 50GB data per month and unlimited calls, while Option B offers 70GB data with slightly higher cost. Since you stream videos daily, Option B may be more suitable."
5. Handle Queries and Confirm Understanding:
    - Answer customer questions clearly and ensure they understand the differences between plans.
    - Example: "Would you like me to summarize the benefits of the plan you prefer?"
6. Assist in Final Selection and Activation:
    - Once the customer chooses a plan or product, guide them through subscription, device setup, or payment process.
    - Example: "Let's activate your selected plan now, and I can help set up your phone for optimal performance."

**Guiding Customers in Practice**

| Step | Action/Example |
|---|---|
| 1. Greeting & Needs Assessment | Welcome customer and ask: "What do you primarily need – calls, data, or both?" |
| 2. Assess Preferences | Identify usage pattern: heavy data user, frequent caller, or family plan requirement |
| 3. Present Options with FAB | Feature: 100GB data plan<br>Advantage: Uninterrupted streaming<br>Benefit: Enjoy videos and work online without interruptions |
| 4. Compare Alternatives | Show multiple plans: highlight cost, data limits, and suitability for customer needs |
| 5. Address Queries | Answer questions about cost, validity, or device compatibility |
| 6. Confirm & Activate | Guide customer in final selection, payment, and plan activation |

## 4.2.4 Processing Sales Transactions, Issuing Invoices, and Ensuring Accurate Billing in Telecom

Accurate processing of sales transactions and billing is a critical function in a telecom environment. It ensures transparency, builds customer trust, and supports smooth business operations. For NSQF Level 3 learners, it is important to demonstrate the ability to handle customer transactions professionally, verify details meticulously, generate correct invoices, and maintain proper records. Proper execution of this process minimizes errors, avoids disputes, and enhances customer satisfaction.

**Key Steps in Processing Sales Transactions and Billing**

1. **Receive Customer Request and Understand Requirements**
   - Begin by confirming the product or service the customer wants to purchase or subscribe to.
   - Example: "You want to activate the 50GB monthly plan and purchase a new SIM card, correct?"
   - Take note of any special requests, promotions, or bundled services the customer is eligible for.

2. **Verify Customer Identity and Eligibility**
   - Confirm the customer's identity with valid ID proofs and cross-check account details.
   - Check eligibility for plans, offers, or loyalty programs to ensure the customer receives appropriate benefits.
   - Example: Verify if a long-term subscriber is eligible for bonus data under a loyalty program.

3. **Calculate Total Cost Accurately**
   - Determine the cost of products/services, applicable taxes, discounts, and any additional charges.
   - Example:
     - o 50GB Plan = ₹499
     - o SIM Card = ₹100
     - o GST (18%) = ₹114.12
     - o Total Payable = ₹713.12
4. **Process Payment Securely**
   - Accept payments through cash, debit/credit card, UPI, or digital wallets.
   - Issue payment confirmation to the customer and ensure the transaction is recorded in the system.
   - Example: Customer pays via UPI; system generates a digital receipt instantly.
5. **Generate and Issue Invoice**
   - Create an invoice including:
     - o Customer Name & Contact
     - o Date of Transaction
     - o Products/Services Purchased
     - o Quantity and Unit Price
     - o Taxes, Discounts, and Total Amount
   - Ensure that all legal and company standards for invoicing are met.

6. **Verify Billing Accuracy**
   - Double-check that all items, taxes, discounts, and totals match the customer order and pricing rules.
   - Example: Confirm that GST has been applied correctly and the total matches the sum of plan + device + taxes.

7. **Provide Invoice and Customer Confirmation**
   - Hand over the printed or digital invoice to the customer.
   - Review the key details of the invoice and confirm that the customer is satisfied.
   - Example: "Here is your invoice. Your 50GB plan is now active, and your SIM card is ready to use."

8. **Assist with Activation and Setup**
   - Guide the customer in activating the plan or setting up devices if necessary.
   - Example: Help the customer configure APN settings or install telecom apps.

9. **Update Records in CRM/Billing System**
   - Log the transaction, customer details, and invoice information in the CRM for auditing, reporting, and follow-up purposes.
   - Example: The system automatically tracks payment, plan activation, and service start date.

**2. Step-by-Step Execution**

| Step | Action/Example |
|---|---|
| 1. Receive Request & Understand Requirements | Confirm plan/device requested: “You want 50GB plan + new SIM?” |
| 2. Verify Identity & Eligibility | Check ID, account details, and eligibility for promotions/loyalty benefits |
| 3. Calculate Total Cost | Plan = ₹499, SIM = ₹100, GST 5% → Total = ₹630 |
| 4. Process Payment | Accept cash/card/UPI; issue receipt or confirmation |
| 5. Generate Invoice | Include customer name, products, quantities, prices, taxes, discounts, and total |
| 6. Verify Billing Accuracy | Ensure totals, taxes, and discounts are correct before issuing |
| 7. Provide Invoice & Confirmation | Hand over invoice and explain key details to customer |
| 8. Assist with Activation & Setup | Guide customer in plan activation, device setup, or app installation |
| 9. Update CRM/Billing Records | Log transaction details for future reference and auditing |

Processing sales transactions, issuing invoices, and ensuring accurate billing require a structured approach, attention to detail, and customer-centric execution. By verifying customer details, calculating costs accurately, generating error-free invoices, and updating records systematically, telecom executives can enhance customer satisfaction, maintain trust, and support efficient business operations.

# Notes

# UNIT 4.3: Customer Retention, Complaint Handling, and Service Standards

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the role of follow-up interactions in building long-term customer relationships and increasing customer loyalty.
2. Demonstrate customer follow-up techniques to ensure satisfaction and build long-term relationships.
3. Enlist best practices for handling customer complaints and query escalation as per organizational standards.
4. Show how to handle customer complaints and escalate queries in accordance with company policies.
5. Discuss the significance of adhering to Service Level Agreements (SLAs) and maintaining response time standards.

## 4.3.1 The Role of Follow-Up Interactions in Building Customer Relationships

Follow-up interactions are essential for maintaining ongoing communication with customers after a product purchase, service request, or inquiry. They demonstrate that a company values its customers beyond the point of sale and is committed to ensuring their satisfaction. For telecom executives, effective follow-ups help resolve outstanding issues, offer additional solutions, and strengthen trust, ultimately increasing customer loyalty and long-term engagement.


*Fig. 4.3.1 Ways to improve customer relationship*

1. Enhances Customer Satisfaction:
   - Checking in with customers ensures they are happy with the product or service.
   - Example: Following up after a broadband installation to confirm speed and connectivity satisfaction.
2. Builds Trust and Loyalty:
   - Consistent follow-ups show that the company cares about the customer experience, not just immediate sales.
   - Example: Calling a customer after a new SIM activation to ensure it is working correctly.
3. Identifies Opportunities for Upselling or Cross-Selling:
   - Follow-ups provide a chance to suggest additional services or upgrades relevant to customer needs.
   - Example: Informing a data-heavy customer about a higher-tier plan for uninterrupted streaming.
4. Resolves Complaints and Prevents Churn:
   - Proactively addressing issues prevents dissatisfaction from escalating and reduces the likelihood of customers leaving for competitors.
5. Collects Valuable Feedback:
   - Follow-ups allow companies to gather insights about service quality, product performance, and customer preferences.

**Techniques for Effective Follow-Up**

- Timely Contact: Reach out shortly after the transaction, service installation, or complaint resolution.
- Personalized Communication: Reference the customer's recent interaction or purchase to make the follow-up relevant.
- Active Listening: Listen to any concerns and provide solutions promptly.
- Record and Track Follow-Ups: Log each interaction in the CRM system to monitor progress and plan future engagement.
- Offer Additional Support or Benefits: Inform customers about upgrades, loyalty points, promotions, or helpful resources.

**Conducting Effective Follow-Ups**

| Step | Action/Example |
|---|---|
| 1. Identify Customer for Follow-Up | Select customers who recently purchased a plan, device, or availed a service. |
| 2. Schedule Timely Contact | Call or message within 2–3 days after service delivery or installation. |
| 3. Personalized Greeting | "Hello Mr. Kumar, I'm calling to check if your new broadband plan is working smoothly." |
| 4. Listen & Address Concerns | Note any issues with connectivity, device setup, or billing, and provide solutions. |

| | |
|---|---|
| 4. Listen & Address Concerns | Note any issues with connectivity, device setup, or billing, and provide solutions. |
| 5. Offer Additional Solutions | Suggest relevant add-ons, upgrades, or loyalty benefits. Example: “You may consider our unlimited night data plan for uninterrupted streaming.” |
| 6. Document Interaction | Record the call, issues raised, and follow-up actions in CRM for future reference. |
| 7. Plan Next Interaction | Set reminders for future check-ins, feedback surveys, or promotional offers. |

## 4.3.2 Customer Follow-Up Techniques for Satisfaction and Loyalty

Follow-ups are critical for maintaining customer engagement after a product purchase, service activation, or complaint resolution. Effective follow-up techniques help telecom executives ensure customer satisfaction, resolve issues proactively, and build trust and loyalty over time. At NSQF Level 3, learners are expected to practice structured follow-up methods, use CRM systems for tracking, and communicate professionally.

**Key Follow-Up Techniques**

1. **Timely Follow-Up**
    - Contact the customer soon after the transaction or service delivery to confirm satisfaction.
    - Example: A broadband customer receives a call two days after installation to ensure speed and connectivity are working as expected.
2. **Personalized Communication**
    - Reference the customer’s recent purchase or request to make the interaction relevant.
    - Example: “Hello Ms. Sharma, I am following up regarding the new 5G SIM you activated last week. Is everything working fine?”
3. **Active Listening and Issue Resolution**
    - Pay attention to concerns, ask clarifying questions, and provide solutions promptly.
    - Example: A customer reports slow internet speed; the executive troubleshoots and escalates to the technical team if necessary.
4. **Provide Additional Value**
    - Suggest upgrades, add-ons, or loyalty benefits based on customer usage patterns.
    - Example: “Since you frequently stream videos, you may consider our unlimited night data add-on for uninterrupted viewing.”
5. **Document and Track Follow-Ups**
    - Record the interaction, customer concerns, and any actions taken in CRM for future reference.
    - Schedule reminders for future follow-ups, surveys, or promotional offers.
6. **Professional Communication**
    - Maintain a polite and positive tone, using clear language and empathy.
    - Avoid rushed conversations; ensure the customer feels valued.

**2. Follow-Up Interaction Process**

| Step | Action / Example |
|---|---|
| 1. Identify Customers for Follow-Up | Select customers who recently purchased a plan, device, or availed a service. |
| 2. Schedule Follow-Up Contact | Call or message within 2–3 days of service delivery or complaint resolution. |
| 3. Personalized Greeting | "Hello Mr. Verma, I'm checking on your new mobile plan. Is everything working smoothly?" |
| 4. Listen and Address Concerns | Note any issues (e.g., network speed, device setup) and provide solutions or escalate if required. |
| 5. Offer Additional Solutions | Suggest relevant add-ons, upgrades, or loyalty benefits. |
| 6. Confirm Customer Satisfaction | Ask: "Are you satisfied with the plan and service provided?" |
| 7. Document Interaction | Record details of the conversation, concerns, and actions in CRM. |
| 8. Plan Next Interaction | Set reminders for future check-ins, surveys, or promotions. |

## 4.3.3 Handling Customer Complaints and Query Escalation in Telecom

Effectively managing customer complaints and escalating queries when necessary is essential for maintaining customer satisfaction and protecting the company's reputation. Telecom executives must follow organizational standards, remain professional, and ensure timely resolution. Proper complaint handling improves trust, reduces churn, and demonstrates a commitment to high-quality service.

**1. Best Practices for Handling Customer Complaints**

1. **Listen Actively and Empathize**
    - Allow the customer to explain their issue without interruption.
    - Show understanding and empathy.
    - Example: "I understand how frustrating call drops can be. Let's work together to resolve this."
2. **Acknowledge the Complaint**
    - Confirm that the complaint is received and will be addressed promptly.
    - Example: "Thank you for bringing this to our attention. We will investigate this issue immediately."
3. **Record the Complaint Accurately**
    - Log details in the CRM system, including customer information, complaint type, and context.
    - Example: Note the time, location, plan details, and nature of the network issue.
4. **Resolve at First Point of Contact (if possible)**
    - Try to address the complaint without escalating, following company procedures.
    - Example: Troubleshoot network settings or provide immediate adjustments to the customer's plan.
5. **Follow Organizational Policies for Escalation**
    - If the complaint cannot be resolved immediately, escalate it to the appropriate department or higher authority.
    - Include all necessary details to avoid delays.
    - Example: Forward unresolved billing complaints to the billing department with full documentation.
6. **Keep the Customer Informed**
    - Provide updates on the status of their complaint or query until resolved.
    - Example: "Your request has been forwarded to the technical team. We expect resolution within 24 hours."
7. **Confirm Resolution and Customer Satisfaction**
    - After resolution, follow up to ensure the customer is satisfied.
    - Example: "We've resolved your connectivity issue. Is everything working smoothly now?"
8. **Analyze and Learn**
    - Document recurring complaints and trends to improve services and prevent future issues.
    - Handling Customer Complaints and Escalating Queries

**Handling Customer Complaints and Escalating Queries**

| Step | Action / Example 1 | Example 2 | Example 3 |
|---|---|---|---|
| 1. Receive Complaint | Customer reports frequent call drops. | Customer reports incorrect billing amount. | Customer complains about slow internet speed. |
| 2. Acknowledge and Empathize | "I understand how frustrating call drops can be. Let's resolve this quickly." | "I see that you were overcharged. We'll check this immediately." | "I understand slow internet is inconvenient. Let's troubleshoot it together." |
| 3. Record Complaint in CRM | Log plan type, location, issue details, timestamp. | Record invoice number, billing cycle, and complaint notes. | Note speed test results, plan details, and affected services. |
| 4. Attempt First-Level Resolution | Advise customer to restart device or adjust network settings. | Verify billing data and correct minor errors immediately. | Check router/modem settings or suggest temporary solutions. |
| 5. Escalate if required | Escalate to technical team if issue persists. | Escalate to billing department for complex discrepancies. | Escalate to network operations team for persistent low speed. |
| 6. Communicate Updates | Inform: "Technical team will resolve within 24 hours." | Inform: "Billing team is reviewing your invoice; we'll update in 48 hours." | Inform: "Our network team is working on improving speed; expected resolution by tomorrow." |
| 7. Confirm Resolution | Call customer: "Are your calls now stable?" | Call/email: "The billing error has been corrected. Is everything okay now?" | Call: "Is your internet speed back to normal?" |
| 8. Document Learnings | Record recurring technical complaints for analysis. | Note patterns in billing errors for preventive measures. | Log network speed complaints by area for improvement. |

## 4.3.4 Significance of Adhering to SLAs and Maintaining Response Time Standards

Service Level Agreements (SLAs) are formal commitments between a telecom service provider and its customers, defining the quality, availability, and timeliness of services. For telecom executives, adhering to SLAs and response time standards is critical to ensuring reliability, trust, and customer satisfaction. It not only protects the company's reputation but also strengthens long-term customer relationships and minimizes disputes.

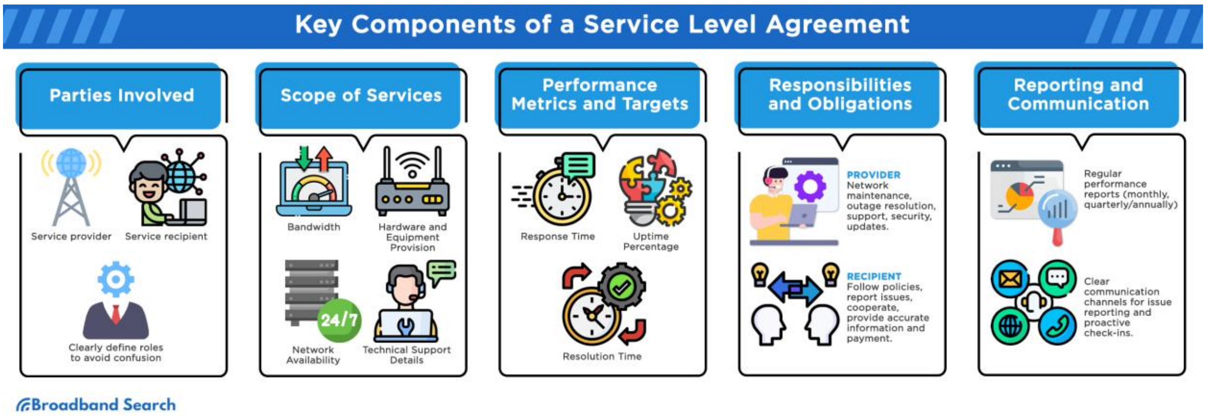


*Fig. 4.3.2 Key component of Service Level Agreement*

**Importance of SLAs in Telecom**

1. Defines Customer Expectations:
   - SLAs clearly outline service standards such as uptime, call resolution time, and network performance.
   - Example: A broadband SLA may guarantee 99.5% uptime per month.
2. Enhances Accountability:
   - Adhering to SLAs ensures that both the company and its employees are accountable for timely service delivery and issue resolution.
3. Improves Customer Satisfaction and Trust:
   - Meeting SLAs demonstrates reliability and professionalism.
   - Example: Resolving a billing dispute within 24 hours as per SLA builds confidence in the service provider.
4. Reduces Customer Complaints and Churn:
   - Consistently meeting SLAs minimizes service-related complaints and increases customer retention.
5. Provides Measurable Performance Metrics:
   - Response times, resolution times, and service quality can be monitored to assess operational efficiency.
   - Example: Average Call Handling Time (ACHT) and Turnaround Time (TAT) are tracked to ensure adherence to SLAs.

**Importance of Maintaining Response Time Standards**

1 Ensures Prompt Customer Support:
   - Quick response to inquiries, complaints, and service requests prevents customer frustration.
2. Strengthens Professionalism:
   - Adhering to response time standards reflects the company's commitment to high-quality service.

**3. Facilitates Efficient Operations:**

- Timely handling of requests helps streamline processes and prevents backlog accumulation.

**4. Supports SLA Compliance:**

- Maintaining predefined response times is a key SLA parameter that affects overall service quality.

**5. Enhances Customer Retention and Loyalty:**

- Customers are more likely to remain loyal when issues are addressed promptly and efficiently.

**SLA and Response Time Compliance**

| Aspect | Best Practices / Example |
|---|---|
| Uptime & Service Availability | Ensure broadband or mobile services meet guaranteed uptime (e.g., 99.5% monthly uptime). |
| Response to Customer Queries | Respond to emails or calls within defined SLA limits (e.g., within 24 hours). |
| Complaint Resolution | Resolve issues like network faults or billing disputes within SLA timelines. |
| Monitoring & Reporting | Track metrics like Average Handling Time, TAT, and first-call resolution to ensure compliance. |
| Communication with Customers | Inform customers proactively about delays, outages, or resolution status. |
| Escalation Protocols | Escalate unresolved issues to higher authorities before SLA breach occurs. |

Adhering to SLAs and maintaining response time standards is crucial for ensuring service reliability, customer satisfaction, and operational efficiency. Telecom executives who consistently meet these standards contribute to trustworthy service delivery, reduced complaints, and strengthened long-term customer relationships.

## Exercise

**A. Multiple Choice Questions (MCQs):**

1. Why are professional customer interactions important in a telecom showroom?
   a) To complete sales quickly
   b) To enhance customer satisfaction and retention
   c) To avoid handling complaints
   d) To increase product prices

2. Which of the following is the most effective way to understand customer requirements?
   a) Asking closed-ended questions only
   b) Making assumptions about the customer's needs
   c) Asking open-ended questions and listening carefully
   d) Offering promotions without inquiry

3. Loyalty programs offered by telecom companies primarily aim to:
   a) Increase immediate profits only
   b) Retain existing customers and reward loyalty
   c) Reduce the number of sales calls
   d) Avoid offering discounts

4. What does adherence to Service Level Agreements (SLAs) ensure?
   a) Customer complaints are ignored
   b) Response times and services meet agreed standards
   c) Products are sold at a higher margin
   d) Customers are billed incorrectly

**B. Short Questions:**

1. Explain the role of follow-up interactions in building long-term customer relationships.
2. Describe the process of guiding customers in selecting telecom products based on their preferences.
3. What are the key steps involved in processing sales transactions and ensuring accurate billing?

**C. True/False Statements:**

1. Personalized customer service helps improve customer loyalty. ( )
2. Promotions and bundled offers have no significant benefit for customers. ( )
3. Inquiring about customer requirements should be done politely and professionally. ( )
4. Proper escalation of customer complaints ensures service quality and compliance. ( )
5. Service Level Agreements (SLAs) define the expected response time and service standards. ( )

**D. Fill in the Blanks:**

1. Professional customer interactions in a showroom help in enhancing customer ___________ and retention.
2. Loyalty programs are designed to reward ___________ customers.
3. The process of issuing invoices and ensuring accurate billing is part of ___________ transactions.
4. Handling customer complaints as per company policies involves proper ___________ and resolution.

## Notes

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# 5. Showroom Operations and Sales Optimization

Unit 5.1 - Showroom Operations and Sales Optimization

TEL/N0102

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the importance of maintaining showroom displays as per branding and cleanliness standards to attract customers.
2. Demonstrate how to maintain showroom displays as per branding and cleanliness standards.
3. Describe procedures for restocking products and updating price tags in coordination with the supervisor.
4. Show how to restock products and update price tags in coordination with the supervisor.
5. Discuss key sales metrics, such as conversion rate, footfall, and revenue targets, and their role in analyzing showroom performance.
6. Demonstrate the process of tracking daily sales, customer footfall, and inquiries to analyze showroom performance.
7. Explain techniques for identifying upselling and cross-selling opportunities to maximize sales revenue.
8. Show how to identify and implement upselling and cross-selling techniques to boost revenue.
9. Elucidate best practices for cash handling, inventory management, and data protection in showroom operations.
10. Demonstrate security procedures for cash handling, inventory management, and customer data protection.
11. Discuss how a well-maintained showroom impacts customer perceptions, sales performance, and brand reputation.

# UNIT 5.1: Showroom Operations and Sales Optimization

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the importance of maintaining showroom displays as per branding and cleanliness standards to attract customers.
2. Demonstrate how to maintain showroom displays as per branding and cleanliness standards.
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7. Explain techniques for identifying upselling and cross-selling opportunities to maximize sales revenue.
8. Show how to identify and implement upselling and cross-selling techniques to boost revenue.
9. Elucidate best practices for cash handling, inventory management, and data protection in showroom operations.
10. Demonstrate security procedures for cash handling, inventory management, and customer data protection.
11. Discuss how a well-maintained showroom impacts customer perceptions, sales performance, and brand reputation.

## 5.1.1 Maintaining Showroom Displays as per Branding and Cleanliness Standards

A well-maintained telecom showroom plays a crucial role in attracting customers, enhancing their experience, and reinforcing the company's brand image. Showroom displays are often the first point of interaction between the customer and the company, and they must reflect professionalism, organization, and brand consistency. It is essential to understand and demonstrate how to maintain displays that are visually appealing, clean, and aligned with corporate branding guidelines.

**1. Importance of Proper Showroom Display Maintenance**

**Attracts Customers:**

- Clean, organized, and visually appealing displays draw customer attention and create a positive first impression.
- Example: A neatly arranged mobile display with proper lighting encourages customers to explore products.

**Reinforces Brand Identity:**

- Consistent use of company colors, logos, and promotional materials strengthens brand recognition.
- Example: Display banners and product stands follow corporate branding guidelines.

**Enhances Customer Experience:**

- Easy-to-navigate displays and clear product labeling help customers make informed choices.

**Demonstrates Professionalism:**

- A clean and well-organized showroom reflects the company's commitment to quality and service excellence.

**Supports Sales and Promotions:**

- Highlighting promotions, bundled offers, or new launches on displays can influence purchasing decisions.

**2. Techniques to Maintain Showroom Displays**

1. **Organize Products Systematically:**
    - Group products by category, model, or usage.
    - Example: Smartphones displayed separately from accessories with clear labels.
2. **Follow Branding Guidelines:**
    - Ensure logos, colors, and banners are consistent with corporate standards.
    - Example: Posters and stands are positioned according to brand-approved layouts.
3. **Ensure Cleanliness:**
    - Regularly dust shelves, clean glass displays, and remove clutter.
    - Example: Wipe fingerprints off device screens and clean demo units daily.
4. **Maintain Functioning Demo Units:**
    - Ensure interactive devices are charged, working, and updated with the latest software for customer trials.
5. **Highlight Promotions and Offers:**
    - Use signage to clearly display ongoing deals, loyalty programs, or bundled packages.
6. **Monitor and Update Displays Regularly:**
    - Rotate products, replace damaged signage, and update promotional materials to keep the showroom current and appealing.

**3. Steps for Maintaining Showroom Displays**

| Step | Action / Example |
|---|---|
| 1. Organize Products | Group smartphones by model and accessories separately; clearly label prices and features. |
| 2. Apply Branding Guidelines | Position banners, posters, and display stands according to company-approved layouts and colors. |
| 3. Clean Displays | Dust shelves, wipe glass, clean demo devices, and remove any clutter or packaging material. |
| 4. Maintain Demo Units | Ensure demo phones, tablets, or routers are powered, functional, and updated. |
| 5. Highlight Promotions | Display signage for current offers, loyalty programs, or bundles clearly visible to customers. |
| 6. Regular Updates | Replace worn-out materials, rotate products, and update promotions to keep displays fresh. |

## 5.1.2 Restocking Products and Updating Price Tags in Coordination with the Supervisor

In a telecom showroom, ensuring that products are always available and price tags are updated is essential for smooth sales operations and customer satisfaction. Customers expect products to be in stock and priced correctly. If items are missing or mislabeled, it creates confusion, reduces trust, and can affect sales. Hence, showroom staff must follow systematic procedures for restocking products and updating price tags under the guidance of their supervisor. This ensures accuracy, accountability, and adherence to company standards.

**1. Procedures for Restocking Products**

1. **Check Inventory Levels:**
   - Regularly review stock availability using inventory records or by checking shelves.
   - Example: If mobile chargers are running low on display, identify the shortage and note it down.
2. **Inform the Supervisor:**
   - Report low-stock items to the supervisor before taking products from the storage area.
   - Example: "Sir, the display for Model X smartphones has only one unit left. Shall I restock it?"
3. **Collect Stock from Storage:**
   - With supervisor's approval, take products from the stockroom or warehouse.
4. **Restock Shelves/Systematically Arrange:**
   - Place products neatly in their designated sections without blocking visibility.
   - Example: Arrange mobile covers by size and color.
5. **Record Restocking in Log/CRM:**
   - Update stock movement records or digital systems as per company procedures.

**2. Procedures for Updating Price Tags**

1. **Receive Price Update Notification:**
   - Company or supervisor provides revised price lists (due to discounts, promotions, or policy changes).
2. **Verify Prices with Supervisor:**
   - Confirm changes before updating to avoid mistakes.
3. **Replace Old Tags:**
   - Remove outdated price tags and replace them with new ones clearly visible to customers.
   - Example: Replace the old ₹12,000 tag with the revised ₹11,500 tag for a handset on discount.
4. **Cross-Check Accuracy:**
   - Ensure the displayed price matches the billing system and supervisor's instructions.
5. **Update Records:**
   - Note the changes in price tag update logs or digital records.

**3. Restocking & Updating Price Tags**

| Step | Action Example |
|---|---|
| Identify Low Stock | Staff notices only one headphone unit left on display. |
| Inform Supervisor | “Sir, should I bring five more units from the store?” |
| Collect & Restock | Supervisor approves → staff collects products from storeroom and arranges them neatly. |
| Receive Price Update | Supervisor informs: New promotional price for Router X is ₹1,999 instead of ₹2,199. |
| Update Price Tag | Staff removes the old tag and places a new one in the correct format. |
| Verify & Record | Supervisor cross-checks → staff updates stock/price change in CRM or manual logbook. |

## 5.1.3 Key Sales Metrics for Analyzing Showroom Performance

In a telecom showroom, measuring performance is just as important as serving customers. Sales metrics provide valuable insights into how effectively the showroom is operating, whether sales strategies are working, and where improvements are needed. By tracking metrics like conversion rate, footfall, and revenue targets, telecom staff and supervisors can analyze customer behavior, evaluate sales effectiveness, and align business goals with customer needs.

**1. Key Sales Metrics**

1. **Footfall (Customer Visits):**
   - Definition: The total number of people visiting the showroom during a specific period (daily, weekly, monthly).
   - Role: Indicates customer interest in the showroom and marketing effectiveness.
   - Example: If 500 customers visit in a week but only 50 purchase, staff can analyze why the conversion is low (product display, pricing, or service).
2. **Conversion Rate:**
   - Definition: The percentage of visitors who make a purchase out of the total footfall.
   - Formula:

$$\text{Conversion Rate} = \frac{\text{Number of Sales}}{\text{Total Footfall}} \times 100$$

- Role: Reflects the effectiveness of sales staff in converting visitors into buyers.
- Example: If 100 out of 500 visitors buy a mobile phone, the conversion rate is 20%.

**2. Revenue Targets:**

- Definition: The sales amount (in ₹) that the showroom aims to achieve in a given time.
- Role: Helps measure whether the showroom is meeting business goals.
- Example: If the monthly revenue target is ₹10,00,000 but only ₹8,50,000 is achieved, corrective action is needed (promotions, better upselling).

**2. Role of Sales Metrics in Showroom Performance**

| Metric | Role in Performance Analysis | Example |
|---|---|---|
| Footfall | Shows the volume of customer interest and effectiveness of promotions | A weekend promotion increases footfall by 30% |
| Conversion Rate | Measures how well staff convert visitors into customers | Staff training improves conversion from 15% to 25% |
| Revenue Targets | Tracks financial success and business growth | Achieving ₹12,00,000 revenue against a target of ₹10,00,000 shows strong performance |

**3. Practical for Learners**

| Step | Demonstration Activity |
|---|---|
| 1. Counting Footfall | Use a daily log or digital counter to record every visitor entering the showroom. |
| 2. Calculating Conversion Rate | Record the number of purchases, divide by total visitors, and calculate percentage. |
| 3. Tracking Revenue | Compare actual sales amount with monthly target. Note shortfall or surplus. |
| 4. Performance Analysis | Discuss with supervisor: "Why was conversion low this week?" or "How can we improve revenue with bundled offers?" |

## 5.1.4 Tracking Daily Sales, Customer Footfall, and Inquiries to Analyze Showroom Performance

Daily tracking of sales, customer visits, and inquiries is an essential task in a telecom showroom. It allows the team to monitor performance, identify trends, and take corrective measures where necessary. By recording this data consistently, showroom staff and supervisors can analyze whether sales targets are being met, how many customers are showing interest (footfall), and what type of inquiries are most common. This ensures better decision-making and improved customer service.

**1. Key Elements to Track Daily**

**1. Daily Sales**

- Record the number of products sold and total sales revenue.
- Example: 15 mobile phones, 20 SIM activations, 10 accessories → Total revenue ₹1,25,000.

**2. Customer Footfall**

- Count the total number of people who entered the showroom, whether they purchased or not.
- Example: 120 customers entered the showroom in a day.

**3. Customer Inquiries**

- Record all customer queries (about products, services, billing, or promotions), even if they do not lead to immediate sales.
- Example: 30 inquiries about new 5G plans, 15 about broadband, 10 about accessories.

**2. Process**

| Step | Action | Example |
|---|---|---|
| 1. Record Daily Sales | Enter sales data in CRM/software or sales register. | 10 smartphones, 5 routers, 8 SIM activations sold. |
| 2. Count Customer Footfall | Use a footfall counter, logbook, or digital system. | 95 customers entered showroom today. |
| 3. Note Customer Inquiries | Record queries in CRM or inquiry register with category. | 12 customers asked about postpaid plans, 5 about bundled offers. |
| 4. Verify with Supervisor | Share daily figures with supervisor for cross-checking. | Supervisor validates sales receipts and footfall count. |
| 5. Analyze Data | Compare sales against footfall and inquiries. | Out of 95 footfall, 23 made purchases → Conversion = 24%. |
| 6. Report Findings | Prepare a short daily summary for management. | Daily Sales: ₹2,10,000; Footfall: 95; Inquiries: 25 (mostly broadband). |

**3. Sample Daily Tracking Format**

| Date | Footfall (Visitors) | Sales (Units/₹) | Inquiries | Conversion % | Remarks |
|---|---|---|---|---|---|
| 01-Oct-2025 | 100 | 20 units / ₹1,80,000 | 30 (15 broadband, 10 mobile, 5 accessories) | 20% | Good sales, high broadband inquiries |
| 02-Oct-2025 | 85 | 15 units / ₹1,25,000 | 20 (mostly 5G plans) | 18% | Customers asked about new plans |
| 03-Oct-2025 | 120 | 25 units / ₹2,50,000 | 40 (broadband + OTT bundle) | 21% | Promotions boosted footfall |

**4. Benefits of Daily Tracking**

- Identifies conversion gaps (visitors vs. buyers).
- Helps in planning promotions based on inquiries.
- Ensures alignment with sales targets.
- Provides real-time feedback to supervisors and management.

## 5.1.5 Identifying and Implementing Upselling and Cross-Selling Techniques

In a telecom showroom, customers often visit with a specific product or service in mind. However, skilled sales staff can add more value to the customer's purchase while also increasing showroom revenue through techniques like upselling and cross-selling.

- Upselling means encouraging customers to buy a higher-value product or upgraded version of what they came for.
- Cross-selling means suggesting complementary products or services that enhance the main purchase.

When done professionally, these techniques improve customer satisfaction, as customers feel they are receiving better value and convenience, while also helping the showroom meet its revenue targets.

**1. Techniques for Identifying Opportunities**

1. Understand Customer Needs
   - Ask open-ended questions to learn more about customer preferences and usage.
   - Example: "Do you usually watch a lot of movies and sports on your phone?"
2. Observe Purchase Intent
   - Check what product the customer is interested in and find possible upgrades or add-ons.
3. Match with Suitable Options
   - Suggest related or higher-value products only when relevant to the customer's requirements.
4. Use FAB (Features–Advantages–Benefits) Approach
   - Explain clearly how the suggested product/service benefits the customer.

**2. Upselling and Cross-Selling Scenarios**

| Scenario | Customer's Intent | Upselling Opportunity | Cross-Selling Opportunity | Example Conversation |
|---|---|---|---|---|
| 1. Buying a Smartphone | Customer asks for a mid-range phone | Suggest higher model with better camera & storage | Offer screen guard, cover, or wireless earbuds | "This model is good, but for just ₹2,000 more you get a 64MP camera and double storage. Also, would you like a cover and earphones to protect and enjoy your phone?" |
| 2. New SIM / Plan Activation | Customer wants a prepaid SIM | Suggest postpaid plan with more data/OTT benefits | Offer add-ons like international calling pack | "Our postpaid plan gives you unlimited data and free OTT subscription. Would you also like to add an ISD pack for your frequent calls abroad?" |

| | | | | |
|---|---|---|---|---|
| 3. Broadband Connection | Customer interested in basic internet plan | Suggest higher-speed plan for better streaming | Offer Wi-Fi extender or router upgrade | "Since your family uses multiple devices, a higher-speed plan will avoid buffering. You can also take a Wi-Fi extender to cover all rooms." |
| 4. Buying Router | Customer asks for standard router | Suggest dual-band/high-speed router | Offer installation service or extended warranty | "This dual-band router gives you stronger signals across multiple devices. For peace of mind, you can also take a 2-year extended warranty." |

**3. Best Practices**

- Recommend products relevant to customer needs (avoid pushing unnecessary items).
- Always highlight value and benefits, not just features.
- Be polite and professional while suggesting additional purchases.
- Ensure that CUSTOMER feels supported, not pressured.

## 5.1.7 Discuss How a Well-maintained Showroom Impacts Customer Perceptions, Sales Performance, and Brand Reputation

The physical appearance and organization of a telecom showroom play a vital role in shaping customer perceptions. A clean, well-arranged, and brand-aligned showroom not only creates a welcoming environment but also boosts customer confidence in the company's products and services. For sales staff, maintaining the showroom is not just about cleanliness but also about ensuring that brand image, sales performance, and customer satisfaction are consistently upheld.

**1. Impact on Customer Perceptions**

- First Impressions Matter: Customers judge the professionalism of a company from the moment they walk in.
- Comfort and Trust: A neat and well-lit showroom with clear product displays makes customers feel comfortable and respected.
- Ease of Decision-Making: Organized shelves, price tags, and demo units help customers compare products easily and make faster decisions.

Example: A customer entering a showroom with clean displays, updated offers, and working demo phones is more likely to feel positive and trust the company.

**2. Impact on Sales Performance**

- Encourages Purchases: Attractive displays and promotions influence buying decisions.
- Supports Upselling and Cross-Selling: Highlighting premium products or bundled offers through proper placement increases sales opportunities.
- Boosts Efficiency: Staff spend less time searching for products in a well-arranged showroom, improving service speed.

Example: A clearly labeled section for 5G phones can increase sales as customers quickly find and compare latest models.

**3. Impact on Brand Reputation**

- Consistency with Brand Standards: Showrooms that follow company branding guidelines reflect professionalism and reliability.
- Competitive Advantage: Customers prefer brands that provide a clean, modern shopping experience.
- Long-Term Loyalty: A positive environment builds customer trust, leading to repeat visits and stronger brand recall.

Example: If Brand A showroom is always clean, branded, and welcoming, while Brand B's showroom looks cluttered, customers are more likely to prefer Brand A.

## Exercise

**A. Multiple Choice Questions (MCQs):**

1. What is the primary reason for maintaining showroom displays as per branding and cleanliness standards?
   a) To reduce cleaning costs
   b) To attract and engage customers
   c) To increase staff workload
   d) To comply with tax regulations
2. Which of the following metrics helps measure the percentage of visitors who make a purchase?
   a) Footfall
   b) Conversion rate
   c) Revenue target
   d) Inventory turnover
3. Upselling in a showroom refers to:
   a) Selling a lower-priced product instead of a higher one
   b) Offering additional products or services to increase overall sales
   c) Ignoring customer preferences
   d) Reducing product prices to clear stock
4. Which of the following is a best practice for protecting customer data in showroom operations?
   a) Writing customer information on sticky notes
   b) Storing data in unsecured files
   c) Following organizational data protection protocols
   d) Sharing customer details with all staff freely

**B. Short Questions:**

1. Explain two techniques for identifying upselling or cross-selling opportunities in a telecom showroom.
2. Describe the procedures for restocking products and updating price tags in coordination with the supervisor.
3. List three best practices for cash handling, inventory management, and customer data protection in showroom operations.

**C. True/False Statements:**

1. Updating price tags should always be done in coordination with the supervisor.
2. Tracking daily sales, footfall, and inquiries is unnecessary if revenue targets are met.
3. A clean, organized showroom positively influences customer perception and brand reputation.
4. Cross-selling involves suggesting complementary products to customers to enhance sales.

## Notes

# 6. Tracking and Evaluating Self-Performance

Unit 6.1 - Tracking and Evaluating Self-Performance

TEL/N0115

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the importance of tracking daily work metrics such as login hours, customer interactions, call handling time, and attendance.
2. Demonstrate how to record daily work-related metrics, including login hours, customer interactions, and attendance.
3. Describe procedures for maintaining accurate records of completed tasks and escalating issues as per company guidelines.
4. Show how to maintain accurate documentation of completed tasks and escalate issues following company procedures.
5. Discuss methods for comparing personal performance against assigned sales, service, or operational targets.
6. Demonstrate how to compare personal performance against assigned sales, service, or operational targets using performance reports.
7. Elucidate different sources of feedback, including customer reviews, supervisor evaluations, and internal reports.
8. Show how to collect and review customer and supervisor feedback to assess service quality and efficiency.
9. Explain how to analyze feedback and audit results to identify strengths and areas for improvement.
10. Demonstrate techniques to analyze feedback and identify areas for self-improvement.
11. Enlist best practices for utilizing feedback to enhance service quality and work efficiency.

# UNIT 6.1: Tracking and Evaluating Self-Performance

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the importance of tracking daily work metrics such as login hours, customer interactions, call handling time, and attendance.
2. Demonstrate how to record daily work-related metrics, including login hours, customer interactions, and attendance.
3. Describe procedures for maintaining accurate records of completed tasks and escalating issues as per company guidelines.
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5. Discuss methods for comparing personal performance against assigned sales, service, or operational targets.
6. Demonstrate how to compare personal performance against assigned sales, service, or operational targets using performance reports.
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8. Show how to collect and review customer and supervisor feedback to assess service quality and efficiency.
9. Explain how to analyze feedback and audit results to identify strengths and areas for improvement.
10. Demonstrate techniques to analyze feedback and identify areas for self-improvement.
11. Enlist best practices for utilizing feedback to enhance service quality and work efficiency.

## 6.1.1 Measuring Performance of a Customer Care Executive (CCE) in Telecom

The performance of a Customer Care Executive (CCE) is evaluated based on external factors, such as customer satisfaction and achievement of customer goals, and internal factors, including individual targets and critical success factors. Measuring performance ensures accountability, identifies areas for improvement, and helps executives excel in their roles. Peer reviews and adherence to company targets also help identify top performers.

**1. Common Performance Parameters in Telecom Call Centres**

**1.1 Revenue Performance Targets**

- CCEs contribute to revenue by selling, upselling, and cross-selling products or services.
- The goal is to increase Average Revenue per User (ARPU).
- Example: A CCE meeting their target by successfully selling broadband bundles and smartphone upgrades.

**1.2 Collections and Bad Debt Recovery**

- Purpose: Ensure timely collection of past-due payments to safeguard the company's revenue.
- Process:

- Collections Aging Tracking: Categorize overdue invoices (e.g., 0–30 days, 30–60 days, 60+ days).
- Collections Actions:
  - ○ Reminder Message/Call: Contact customer via mail, message, or phone.
  - ○ Red Letter: Issue formal payment notice, e.g., "Pay in 7 days."
  - ○ Service Suspension: Disconnect service if overdue.
  - ○ Debt Recovery Agency: Engage collection agencies for unresolved dues.

**1.3 Churn Management**

- Retaining existing customers is often more profitable than acquiring new ones.
- CCEs handle churn incidents by addressing customer concerns promptly to ensure positive experiences.
- Example: Offering personalized plans or resolving complaints in a single interaction can reduce churn and increase loyalty.

**1.4 Complaint Reduction**

- Monitor complaints through customer surveys and internal audits.
- Implement corrective measures to minimize recurring issues.

**1.5 Adherence to Service Level Agreements (SLAs)**

- SLAs define measurable commitments to customers.
- Example: Walk-in customers should not wait more than 10 minutes; service name changes completed within 48 hours.

**1.6 First Time Resolution (FTR)**

- Resolving a customer query in the first interaction enhances satisfaction and profitability.
- Example: Out of 100 queries in a day, 80 should ideally be resolved the first time.

**2. Time-Based Performance Parameters**

**2.1 Login Time**

- Calculation:

1. Determine expected daily login time: Shift Hours – Break Time.
2. Multiply by total working days in a month.
3. Calculate login percentage:

Login %=Expected Login Hours/Actual Login Hours×100

- Example:
  - o Shift: 9 hours, Break: 1 hour → Expected daily login = 8 hours
  - o Month: 25 days → Expected login = 200 hours
  - o Actual login = 190 hours → Login % = 95%

**2.2 Customer Contact**

- Track the number of customers interacted with.
- Important even if AHT (Average Handling Time) targets are met.

**2.3 Average Call Handling Time (AHT) and Avg. Call Holding Time (ACHT)**

- AHT: Total time spent including call waiting (ACW).
- ACHT: Actual time on call = AHT – ACW.
- Example:

- AHT = 450 sec, ACW = 15 sec → ACHT = 435 sec
- Target AHT = 380 sec, Target ACW = 20 sec →
  - AHT % = 118% (above target)
  - ACW % = 75% (within target)
  - ACHT % = 121% (needs improvement)

**3. Soft Skills / Quality Parameters**

- Performance is also judged on call quality and professionalism:

| Parameter | Description |
|---|---|
| Greeting | Use appropriate greeting to start the call positively. |
| Listening | Listen carefully; avoid making customers repeat information unnecessarily. |
| Solution | Offer accurate and relevant information or resolutions. |
| Offer New Services | Suggest upselling or cross-selling based on customer needs. |
| Offer Assistance | Check if customer requires further help after resolving query. |
| Close | End the call on a positive, courteous note. |
| System Update | Update customer information and CRM records accurately. |

A CCE's performance is multi-dimensional, combining revenue generation, customer retention, complaint resolution, SLA adherence, call efficiency, and soft skills. Regular monitoring of these metrics, along with constructive feedback, ensures continuous improvement, accountability, and high-quality customer service in telecom contact centers.

## 6.1.2 Maintaining Accurate Records and Escalating Issues

In a telecom workplace, keeping accurate records of completed tasks and properly escalating issues is essential for accountability, process efficiency, and customer satisfaction. Proper documentation ensures that supervisors and management have a clear view of operations, while timely escalation helps resolve problems before they impact service quality or revenue. Following company guidelines ensures consistency and compliance across the organization.

**1. Procedures for Maintaining Accurate Records**

1. Document Completed Tasks Daily
   - Use CRM software, logbooks, or digital task trackers.
   - Record task details, completion time, and outcomes.
   - Example: Recording the installation of 5 new broadband connections, including customer details and service activation time.
2. Use Standard Templates or Formats
   - Follow company-approved formats for reporting to maintain consistency.
   - Example: Using a predefined CRM entry form for service calls or complaints.

3. Verify Information
   - Double-check customer details, task status, and timestamps to prevent errors.
   - Example: Ensure that the bill updated for a customer matches the payment received.
4. Update Records in Real-Time
   - Record tasks immediately after completion to avoid missed or inaccurate entries.
   - Example: After resolving a query, log the resolution notes in CRM immediately.
5. Maintain Historical Logs
   - Keep records organized for easy retrieval and auditing.
   - Example: Archived records of customer complaints resolved in the last six months.

**2. Procedures for Escalating Issues**

1. Identify Issues Early
   - Recognize when a task cannot be completed or when customer requests cannot be fulfilled.
   - Example: A technical fault preventing a service activation.
2. Follow Escalation Guidelines
   - Escalate issues according to company hierarchy or pre-defined severity levels.
   - Example: Minor delays → Team Lead; Major service outage → Supervisor/Manager.
3. Provide Complete Details
   - Include customer information, issue description, steps taken, and urgency in the escalation.
   - Example: "Customer ID 12345, broadband activation delayed due to router stock shortage. Requested supervisor intervention for expedited solution."
4. Track Escalated Issues
   - Follow up on escalated tasks to ensure resolution and update records once resolved.

**3. Maintaining Records and Escalating Issues**

| Step | Action / Example |
|---|---|
| 1. Task Completion Recording | Log resolved billing query in CRM with timestamp and resolution notes. |
| 2. Use Standard Format | Enter service request updates using company-approved template. |
| 3. Verification | Cross-check customer ID, payment status, and service details before finalizing record. |
| 4. Real-Time Update | Immediately record completion of SIM activation in CRM. |
| 5. Escalation Identification | Identify a network outage preventing service activation. |
| 6. Escalate Issue | Notify supervisor with all details and severity level. |
| 7. Track Resolution | Monitor supervisor action and update CRM once issue resolved. |

Accurate record-keeping and proper escalation are essential for efficient operations, accountability, and high-quality customer service in a telecom environment. Following standardized procedures ensures that tasks are documented correctly, issues are addressed promptly, and supervisors have the necessary information to make informed decisions.

## 6.1.3 Comparing Personal Performance Against Assigned Targets

In a telecom workplace, it is important for Customer Care Executives (CCEs) or showroom staff to measure their personal performance against assigned targets. These targets may relate to sales, service quality, or operational efficiency. Regular comparison helps employees identify strengths, spot gaps, and improve performance, while also allowing supervisors to provide meaningful feedback. Using performance reports and relevant metrics ensures that comparisons are accurate and actionable.

**1. Methods for Comparing Personal Performance**

1. Use Performance Reports
    - Access daily, weekly, or monthly reports from CRM or other tracking systems.
    - Example: Sales report showing number of units sold, revenue generated, and upselling/cross-selling achievements.
2. Compare Against Assigned Targets
    - Identify the assigned goal and compare it with actual performance.
    - Example: Target = 50 SIM activations per week; Actual = 42 → Performance = 84% of target.
3. Use Key Performance Indicators (KPIs)
    - Common KPIs include:
        - o Sales revenue achieved
        - o Number of products/services sold
        - o First Time Resolution (FTR) percentage
        - o Customer satisfaction scores
    - Example: FTR target = 80%; Actual = 75% → Shortfall = 5%.
4. Analyze Time-Based Metrics
    - Review login hours, call handling time, and response time against expected standards.
    - Example: Expected login hours per month = 200; Actual = 190 → Login % = 95%.
5. Visual Comparison Tools
    - Use graphs, charts, or dashboards for quick assessment of performance trends.
    - Example: Line chart showing weekly sales vs. target.

**2. Steps for Comparing Performance**

| Step | Action / Example |
|---|---|
| 1. Retrieve Report | Access monthly sales and service performance report from CRM. |
| 2. Identify Targets | Note assigned sales targets, FTR targets, and operational KPIs. |
| 3. Compare Actual vs. Target | Example: Target = 100 product sales; Actual = 85 → 85% achievement. |
| 4. Highlight Gaps | Identify areas below target (e.g., FTR 75% vs. target 80%). |
| 5. Take Corrective Action | Plan improvement strategies (e.g., upselling training, customer follow-ups). |
| 6. Track Progress | Review updated reports after corrective actions to monitor improvement. |

## 6.1.4 Collecting and Reviewing Feedback to Assess Service Quality

Feedback is a crucial tool for improving performance and ensuring high-quality customer service. In a telecom environment, feedback can come from multiple sources including customers, supervisors, and internal reports. Collecting and analyzing feedback helps employees understand strengths, identify gaps, and implement improvements, thereby increasing efficiency, service quality, and customer satisfaction.

**1. Different Sources of Feedback**

| Source | Description | Example |
|---|---|---|
| Customer Reviews | Direct opinions, ratings, and comments from customers regarding products or service. | Customer rates a call center interaction 4/5 stars and comments that resolution was fast but information on add-on services was missing. |
| Supervisor Evaluations | Feedback provided by team leads or managers based on performance observations and reports. | Supervisor notes that the CCE handled difficult queries professionally but exceeded target call handling time (ACHT). |
| Internal Reports | Metrics and performance data extracted from CRM, call logs, or operational dashboards. | Reports show monthly sales, number of queries resolved, FTR %, and average login hours. |
| Customer Surveys | Structured surveys to measure satisfaction, service quality, or product feedback. | Survey asks: "How satisfied are you with the SIM activation process?" with responses collected online or via phone. |
| Peer Feedback | Input from colleagues regarding teamwork, knowledge sharing, and collaboration. | Team member comments: "Handled customer escalations well and assisted in training new joiners." |

**2. Process to Collect and Review Feedback**

| Step | Action / Example |
|---|---|
| 1. Collect Customer Feedback | Use CRM, surveys, online reviews, or call follow-ups to gather customer opinions. Example: Collect feedback after broadband installation. |
| 2. Gather Supervisor Evaluation | Receive monthly or weekly performance review from team lead, including strengths and improvement areas. |
| 3. Access Internal Reports | Review performance metrics like sales achieved, FTR %, ACW, ACHT, and login hours. |
| 4. Analyze Feedback | Compare customer feedback with supervisor evaluation and internal metrics to identify gaps. Example: Low customer rating for query explanation vs. supervisor note on accuracy. |
| 5. Implement Improvement Actions | Focus on training or corrective measures for weak areas, e.g., upselling techniques or call handling speed. |
| 6. Monitor Progress | Track improvements in subsequent feedback cycles to ensure positive change. |

**3. Benefits of Reviewing Feedback**

- Enhances Service Quality: Identifies gaps in query handling, communication, or technical knowledge.
- Boosts Efficiency: Streamlines processes based on recurring issues or suggestions.
- Increases Customer Satisfaction: Acting on feedback improves customer experience.
- Supports Personal Development: Highlights areas for skill enhancement and training needs.

## 6.1.5 Analyzing Feedback and Audit Results to Identify Strengths and Improvement Areas

In a telecom workplace, feedback and audit results are valuable tools for enhancing performance and improving service quality. Feedback can come from customers, supervisors, internal reports, and audits, while audits provide a structured review of processes and compliance. Analyzing these inputs helps employees recognize strengths, identify areas for improvement, and implement corrective actions, ensuring better customer satisfaction and professional growth.

**1. Steps to Analyze Feedback and Audit Results**

| Step | Action / Example |
|---|---|
| 1. Collect Feedback and Audit Reports | Gather customer feedback (surveys, reviews), supervisor evaluations, and audit reports (internal quality checks, compliance audits). Example: Customer survey shows dissatisfaction with billing clarity; audit report highlights delayed updates in CRM. |
| 2. Categorize Feedback | Group feedback into categories such as sales, service, technical support, communication, or process compliance. Example: Billing issues, call handling, query resolution, upselling efficiency. |
| 3. Identify Positive Feedback (Strengths) | Highlight areas where performance meets or exceeds expectations. Example: Customers praise polite communication and friendly demeanor. |
| 4. Identify Negative Feedback (Improvement Areas) | Spot recurring issues, delays, or low ratings that need attention. Example: Frequent complaints about long wait times or incomplete information provided. |
| 5. Compare with Targets and KPIs | Evaluate actual performance metrics against assigned targets or SLAs. Example: FTR target = 80%, actual = 70% → indicates need for improvement in first-time query resolution. |
| 6. Prioritize Areas for Improvement | Focus on high-impact areas that affect customer satisfaction or business performance. Example: Address billing clarity before minor cosmetic issues in CRM entries. |
| 7. Create an Action Plan | Develop a structured plan to enhance skills or correct process gaps. Example: Training on billing queries, call scripting, or CRM updating. |
| 8. Monitor Progress | Track improvements through subsequent feedback and audits to ensure corrective actions are effective. Example: FTR improves from 70% → 85% in next month. |

**2. Techniques for Self-Improvement Based on Feedback**

| Technique | Description / Example |
|---|---|
| Reflection | Review feedback carefully and reflect on personal performance. Example: Note that long call times are affecting ACHT targets. |
| Goal Setting | Set specific, measurable targets for improvement. Example: Reduce average call handling time from 6 mins to 5 mins per call. |
| Skill Enhancement | Attend training, workshops, or online courses to fill gaps. Example: Upselling training or communication skills workshop. |
| Peer Learning | Observe and learn from colleagues who excel in areas where improvement is needed. Example: Shadow a colleague who has high FTR and customer satisfaction. |
| Regular Monitoring | Track own progress weekly or monthly to ensure continuous improvement. Example: Maintain a log of FTR, call time, and customer satisfaction scores. |

**3. Benefits of Feedback Analysis**

- Improves Service Quality: Correcting recurring issues enhances customer experience.
- Boosts Professional Growth: Highlights areas to learn and develop skills.
- Supports Data-Driven Decisions: Provides objective information to guide self-improvement.
- Increases Accountability: Employees become responsible for their performance outcomes.

## 6.1.6 Best Practices for Utilizing Feedback to Enhance Service Quality and Work Efficiency

Feedback is a vital tool for continuous improvement in telecom operations. Using feedback effectively helps employees enhance customer service, improve operational efficiency, and achieve personal and organizational goals. Whether it comes from customers, supervisors, or internal audits, feedback provides actionable insights that guide better decision-making and performance enhancement.

**Best Practices for Utilizing Feedback**

| Practice | Description / Example |
|---|---|
| 1. Collect Feedback Regularly | Seek feedback consistently from multiple sources such as customer surveys, supervisor reviews, and internal audits. Example: Request feedback after each service call or product installation. |
| 2. Categorize and Analyze Feedback | Organize feedback into actionable categories like service quality, technical support, sales, and communication. Example: Group recurring complaints about long call handling times. |
| 3. Focus on Improvement Areas | Identify gaps and prioritize areas that significantly impact customer satisfaction or operational efficiency. Example: Improve First Time Resolution (FTR) if repeated queries are observed. |
| 4. Implement Corrective Actions | Take concrete steps to address shortcomings highlighted in feedback. Example: Attend training sessions on upselling techniques or CRM updates. |
| 5. Track Progress Over Time | Monitor improvements after implementing changes to ensure feedback is effectively addressed. Example: Measure reduction in call handling time or increase in positive customer ratings. |
| 6. Encourage Open Communication | Share feedback results with team members to foster collaboration and collective improvement. Example: Discuss recurring issues in team meetings to brainstorm solutions. |
| 7. Recognize and Reinforce Strengths | Use positive feedback to reinforce effective behaviors and motivate staff. Example: Praise excellent customer handling during weekly review sessions. |
| 8. Document Lessons Learned | Maintain records of feedback, actions taken, and results achieved to guide future improvements. Example: Create a log of resolved issues and techniques that worked for reference. |
| 9. Integrate Feedback into Daily Workflow | Apply insights from feedback to daily operations for continuous efficiency. Example: Adjust call scripts based on common customer concerns noted in feedback. |

Effectively utilizing feedback allows telecom employees to enhance service quality, improve efficiency, and achieve higher customer satisfaction. By systematically collecting, analyzing, and acting on feedback, employees can transform insights into practical improvements, foster professional growth, and contribute to the overall success of the organization.

## Exercise

**A. Multiple Choice Questions (MCQs):**

1. Why is tracking daily work metrics such as login hours and call handling time important?
   a) To monitor salary payments
   b) To ensure service quality, efficiency, and compliance
   c) To reduce the number of employees
   d) To avoid following company rules
2. Which of the following is an example of a source of feedback?
   a) Customer reviews
   b) Supervisor evaluations
   c) Internal reports
   d) All of the above
3. When issues cannot be resolved at your level, the correct procedure is to:
   a) Ignore them
   b) Escalate them as per company guidelines
   c) Inform the customer to wait indefinitely
   d) Handle them without authorization
4. What is the best way to use feedback for professional improvement?
   a) Ignore the negative comments
   b) Analyze strengths and areas of improvement and take corrective action
   c) Share it only with friends
   d) Use it only to compare with colleagues

**B. Short Questions:**

1. Describe the procedures for maintaining accurate records of completed tasks.
2. How can performance reports help in comparing personal performance against assigned targets?
3. Explain how analyzing audit results can help in self-improvement.

**C. True/False Statements:**

1. Attendance tracking is not considered part of daily work metrics. ( )
2. Feedback from supervisors can be used to improve both service quality and efficiency. ( )
3. Escalating unresolved issues ensures timely resolution and customer satisfaction. ( )
4. Internal reports are a reliable source of feedback. ( )
5. Negative feedback should always be ignored to avoid stress. ( )

**D. Fill in the Blanks:**

1. Maintaining accurate documentation of completed tasks ensures ___________ and accountability.
2. Comparing personal performance with assigned targets helps employees measure ___________.
3. Customer reviews, supervisor evaluations, and internal reports are key sources of ___________.
4. Analyzing feedback helps in identifying ___________ and areas for improvement.

## Notes

# 7. Enhancing Work Performance and Adapting to Feedback

Unit 7.1 - Tracking and Evaluating Self-Performance

TEL/N0115

## Key Learning Outcomes

**By the end of this module, the paricipants will be able to:**

1. Explain the significance of implementing corrective actions suggested by supervisors to enhance work performance.
2. Demonstrate how to implement corrective actions based on supervisor feedback to improve work performance.
3. Discuss the importance of conducting periodic performance reviews to track progress and identify areas for improvement.
4. Show how to conduct a self-assessment and participate in performance review discussions with supervisors.
5. Elucidate the process of seeking clarifications on job expectations and applying suggested strategies for better efficiency.
6. Demonstrate effective ways to seek clarifications and apply suggested efficiency strategies in the workplace.
7. Describe the need to adapt to evolving work processes and performance requirements to stay efficient.
8. Show how to adapt to new work processes and performance requirements in a dynamic environment.
9. Enlist best practices for following security protocols and data privacy rules while handling customer data.
10. Demonstrate compliance with security protocols and data privacy rules while handling customer information.
11. Explain the importance of proactive learning and continuous skill development for career growth.

# UNIT 7.1: Tracking and Evaluating Self-Performance

## Unit Objectives

**By the end of this unit, the participants will be able to:**

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2. Demonstrate how to implement corrective actions based on supervisor feedback to improve work performance.
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9. Enlist best practices for following security protocols and data privacy rules while handling customer data.
10. Demonstrate compliance with security protocols and data privacy rules while handling customer information.
11. Explain the importance of proactive learning and continuous skill development for career growth.

## 7.1.1 Implementing Corrective Actions to Enhance Work Performance

Supervisor feedback is a key component of professional development in a telecom workplace. It identifies areas where an employee's performance can be improved and provides specific guidance to enhance skills, efficiency, and service quality. Implementing corrective actions based on this feedback ensures that employees align with organizational standards, meet targets, and deliver consistent customer satisfaction. Timely and effective implementation of corrective measures is essential for personal growth and operational excellence.

**1. Significance of Implementing Corrective Actions**

| Aspect | Significance / Example |
|---|---|
| Improves Work Efficiency | Correcting inefficiencies, such as long call handling times, helps complete tasks faster. Example: Reducing average call time from 6 minutes to 5 minutes improves productivity. |
| Enhances Service Quality | Applying supervisor suggestions improves the accuracy, professionalism, and relevance of service. Example: Providing complete information on new plans as suggested during feedback sessions. |
| Aligns with Organizational Standards | Ensures compliance with company processes, SLAs, and quality expectations. Example: Following the correct procedure for billing adjustments to avoid errors. |
| Boosts Customer Satisfaction | Addressing gaps highlighted in feedback leads to better customer experience. Example: Resolving customer complaints more effectively after applying corrective measures. |
| Supports Personal Development | Helps employees develop skills, knowledge, and confidence in handling complex tasks. Example: Upskilling in upselling techniques based on supervisor recommendations. |
| Promotes Accountability | Shows responsibility by acknowledging feedback and taking action to improve. Example: Logging all corrective actions taken in CRM for transparency. |

**2. Implementing Corrective Actions**

| Step | Action / Example |
|---|---|
| 1. Receive Feedback | Supervisor points out that average call handling time exceeds target and FTR is low. |
| 2. Understand Recommendations | Clarify specific actions needed, e.g., follow the updated call script, confirm customer details first, and offer solutions promptly. |
| 3. Plan Corrective Actions | Identify tasks to implement: practice call scripts, review CRM procedures, and focus on first-time query resolution. |
| 4. Implement Actions | Apply the suggestions during daily work: adhere to new script, double-check data, and resolve queries efficiently. |
| 5. Monitor Results | Track metrics like AHT, FTR %, and customer satisfaction after implementing changes. |
| 6. Seek Feedback Again | Discuss improvements with the supervisor and adjust actions if required for further enhancement. |

## 7.1.2 Conducting Performance Reviews to Track Progress and Improve Performance

Periodic performance reviews are essential in a telecom workplace to track employee progress, evaluate achievements, and identify areas for improvement. These reviews provide structured feedback from supervisors and allow employees to reflect on their own performance, align their efforts with organizational goals, and take corrective actions. Regular assessment ensures continuous learning, professional growth, and enhanced service quality.

**1. Importance of Periodic Performance Reviews**

| Aspect | Significance / Example |
|---|---|
| Track Progress | Reviews help employees see how well they are meeting sales, service, or operational targets. Example: Monitoring monthly FTR % or revenue generated against targets. |
| Identify Improvement Areas | Highlights skill gaps or process inefficiencies. Example: Long call handling times or recurring complaints about billing clarity. |
| Set Goals and Action Plans | Provides guidance for setting realistic targets and corrective actions. Example: Plan to reduce ACHT from 6 minutes to 5 minutes through improved call handling. |
| Encourage Communication | Fosters open discussion between employee and supervisor, creating a platform for feedback and suggestions. |
| Motivate Employees | Recognition of strengths boosts confidence, while constructive feedback inspires improvement. |
| Align with Organizational Objectives | Ensures individual efforts contribute to company goals, such as higher customer satisfaction or revenue growth. |

**2. Conducting Self-Assessment**

| Step | Action / Example |
|---|---|
| 1. Gather Performance Data | Collect personal work metrics: sales figures, FTR %, call times, customer ratings. |
| 2. Reflect on Strengths | Identify areas where performance met or exceeded targets. Example: Positive customer feedback on politeness and clarity. |
| 3. Identify Weaknesses | Note recurring challenges or missed targets. Example: Call handling time exceeded benchmark by 1 minute on average. |
| 4. Compare Against Goals | Evaluate performance against set targets and KPIs. Example: Target = 50 upsells/month; Actual = 42. |
| 5. List Actionable Improvements | Decide on strategies to improve weak areas. Example: Attend upselling training or follow a structured call script. |

**3. Participating in Performance Review Discussions**

| Step | Action / Example |
|---|---|
| 1. Prepare for Discussion | Review self-assessment and gather supporting data. |
| 2. Listen to Supervisor Feedback | Understand observations, areas for improvement, and suggestions. |
| 3. Discuss Achievements and Challenges | Share successes, clarify difficulties, and provide context if needed. |
| 4. Agree on Action Plan | Collaboratively decide on corrective actions and improvement goals. |
| 5. Document Outcomes | Record agreed-upon targets, timelines, and performance improvement steps for follow-up. |

## 7.1.3 Seeking Clarifications and Applying Strategies for Better Efficiency

Understanding job expectations clearly is crucial in a telecom workplace to perform tasks effectively, meet targets, and maintain service quality. Employees often need guidance on processes, targets, or customer handling techniques. Seeking clarifications ensures tasks are executed correctly, while applying suggested strategies improves work efficiency, accuracy, and professional growth. Timely clarification reduces errors, saves time, and enhances customer satisfaction.

**1. Process of Seeking Clarifications on Job Expectations**

| Step | Action / Example |
|---|---|
| 1. Identify Unclear Areas | Recognize parts of tasks or targets that are ambiguous. Example: Unsure about the steps for processing a new broadband connection. |
| 2. Approach Supervisor or Experienced Colleague | Politely ask for guidance or explanation. Example: “Could you please clarify the correct process for updating customer billing details?” |
| 3. Use Structured Questions | Ask specific questions to avoid confusion. Example: “Should I verify customer ID before or after payment confirmation?” |
| 4. Take Notes | Record the clarification or instructions for future reference. Example: Note the updated steps in CRM SOP reference sheet. |
| 5. Confirm Understanding | Summarize the explanation to ensure correctness. Example: “So, I need to verify customer details first, then confirm payment, and finally update CRM. Is that correct?” |

**2. Applying Suggested Strategies for Better Efficiency**

| Step | Action / Example |
|---|---|
| 1. Review Supervisor Suggestions | Understand recommendations for improving efficiency. Example: Use call scripts to reduce call handling time. |
| 2. Integrate Strategies into Daily Work | Apply the suggested methods in routine tasks. Example: Use shortcuts in CRM to update customer records faster. |
| 3. Monitor Personal Performance | Track metrics like task completion time, AHT, FTR %, or sales targets to see improvement. Example: Average call time reduced from 6 minutes to 5 minutes after using scripts. |
| 4. Seek Feedback | After implementing strategies, ask for supervisor feedback to confirm improvements. Example: "I have started using the updated CRM procedure; could you review if it's efficient?" |
| 5. Adjust Based on Feedback | Refine strategies as required to achieve optimal results. Example: Modify call script phrasing for clearer communication based on supervisor suggestions. |

## 7.1.4 Adapting to Evolving Work Processes and Performance Requirements

The telecom industry is dynamic and fast-changing, driven by new technologies, customer expectations, and organizational strategies. Employees must constantly adapt to evolving work processes, updated tools, and revised performance requirements to stay efficient. Flexibility and willingness to learn are key qualities that help individuals remain relevant, improve productivity, and contribute positively to organizational growth.

**1. Need for Adaptability in the Workplace**

| Reason | Explanation / Example |
|---|---|
| Technological Changes | New CRM software, AI-based chat systems, or updated billing platforms require employees to learn and use them effectively. Example: Shifting from manual registers to digital CRM for tracking complaints. |
| Evolving Customer Expectations | Customers now demand faster responses and personalized services. Example: Providing WhatsApp-based support in addition to phone calls. |
| Organizational Policy Updates | New compliance guidelines, SLA changes, or revised targets may affect how tasks are done. Example: Resolving queries within 24 hours instead of 48. |
| Performance Standards | Targets for sales, service quality, or call-handling time may be updated. Example: Reducing Average Handling Time (AHT) to improve efficiency. |
| Market Competition | Adapting ensures the company can stay ahead of competitors by offering better service. Example: Introducing bundled offers in response to rival promotions. |

**2. How to Adapt to New Work Processes and Requirements**

| Step | Action | Example |
|---|---|---|
| 1. Stay Informed | Regularly check for updates from supervisors or training sessions. | Attending a briefing on new sales targets or CRM updates. |
| 2. Be Open to Learning | Participate in refresher trainings, workshops, or e-learning modules. | Learning to use an upgraded billing system through online tutorials. |
| 3. Practice New Processes | Apply new procedures in daily tasks to build confidence. | Using the new complaint-tracking software while assisting customers. |
| 4. Seek Guidance | Ask supervisors or senior colleagues for clarification if a process seems unclear. | Asking, "Can you show me the correct way to log inquiries in the updated CRM?" |
| 5. Monitor Performance | Compare personal results before and after adapting. | Tracking improvement in call resolution time after using an improved script. |
| 6. Provide Feedback | Share challenges faced while adapting, so improvements can be made. | Informing the supervisor if a new tool has a technical glitch slowing down work. |

## 7.1.5 Following Security Protocols and Data Privacy Rules in Handling Customer Data

In the telecom sector, employees frequently handle sensitive customer information such as phone numbers, addresses, ID proofs, billing details, and usage patterns. Protecting this data is not only an ethical responsibility but also a legal requirement under data privacy laws and organizational standards. Any mishandling of information can lead to loss of trust, financial penalties, and reputational damage for the company. Therefore, Customer Care Executives must follow best practices to ensure compliance with security protocols and data privacy guidelines.

**1. Best Practices for Handling Customer Data Securely**

| Best Practice | Explanation / Example |
|---|---|
| Collect Only Relevant Data | Request only the information necessary for the service. Example: Asking for customer ID for SIM card activation, not unrelated details. |
| Verify Customer Identity | Confirm the authenticity of the person before sharing account details. Example: Ask for registered phone number or OTP verification. |
| Maintain Confidentiality | Never disclose customer information to unauthorized persons. Example: Avoid discussing customer account details in public areas. |
| Use Authorized Systems Only | Enter and update data strictly in official CRM/ERP systems provided by the company. |

| | |
|---|---|
| Follow Strong Password Practices | Keep login credentials confidential and change them periodically. Example: Avoid writing passwords on sticky notes. |
| Adhere to Company Policies | Follow internal guidelines such as DND (Do Not Disturb), restricted data access, and record-keeping policies. |
| Report Security Breaches | Immediately inform supervisors if suspicious activity or data misuse is noticed. Example: A system alert showing multiple failed login attempts. |
| Dispose of Data Securely | Shred physical documents and delete electronic files as per company rules when no longer needed. |

**2. Compliance with Security Protocols and Data Privacy**

| Situation | Correct Employee Action |
|---|---|
| Customer requests account details over the phone | Verify customer identity through registered number and OTP before sharing. |
| While updating CRM records | Enter data only in the authorized portal, double-check accuracy, and save securely. |
| Customer provides ID proof for new connection | Scan and upload securely into the system, return original document immediately. |
| Colleague asks for customer details casually | Politely refuse and state: "Sorry, I cannot share customer information without authorization." |
| System generates data privacy compliance alert | Follow company SOP and notify IT/security team. |

## 7.1.6 Importance of Proactive Learning and Continuous Skill Development for Career Growth

In today's competitive work environment, especially in fast-changing sectors like telecom, employees cannot rely only on their initial training. Technology, customer needs, and organizational processes are constantly evolving. To stay relevant and achieve long-term career success, individuals must take responsibility for proactive learning (learning on their own initiative) and continuous skill development (upgrading skills regularly). These habits not only improve current job performance but also open up opportunities for promotions, higher responsibilities, and career advancement.

**Why Proactive Learning and Continuous Skill Development Matter**

| Aspect | Importance / Example |
|---|---|
| Keeps Skills Updated | Telecom tools, CRM systems, and sales techniques change frequently. Learning updates ensures employees perform tasks efficiently. Example: Adapting to a new billing software quickly. |
| Improves Job Performance | Employees who learn new methods handle customers better, close sales faster, and achieve targets consistently. |
| Increases Employability | Professionals with diverse skills are more valued by employers and have better chances of promotions or job opportunities. |
| Boosts Confidence | Learning new skills builds confidence to handle challenges. Example: Attending training on conflict resolution helps in managing angry customers calmly. |
| Supports Career Growth | Continuous upskilling prepares employees for higher roles, such as moving from Customer Care Executive to Team Leader. |
| Encourages Adaptability | Proactive learners can easily adjust to new processes, tools, or organizational changes. Example: Switching from voice-based support to chat/AI-assisted customer service. |
| Enhances Customer Satisfaction | Skilled employees can provide accurate, timely, and professional service, improving overall customer trust and loyalty. |

**Examples of Proactive Learning in Telecom Sector**

- Participating in refresher training sessions on CRM software.
- Attending workshops on sales techniques, upselling, and cross-selling.
- Learning about new telecom products, bundled offers, and loyalty programs.
- Taking online courses on communication skills and customer relationship management.
- Seeking feedback from supervisors and applying suggestions for improvement.

Proactive learning and continuous skill development are essential for career growth. Employees who actively seek knowledge, adapt to changes, and improve their skills not only perform better in their current roles but also build a foundation for future opportunities. In the telecom industry, where change is constant, continuous learning ensures professional growth, job security, and customer satisfaction.

## Exercise

**A. Multiple Choice Questions (MCQs):**

1. Why is it important to implement corrective actions suggested by supervisors?
   a) To avoid additional work
   b) To improve work performance and efficiency
   c) To ignore mistakes
   d) To reduce feedback sessions
2. Conducting periodic performance reviews helps in:
   a) Identifying strengths and improvement areas
   b) Comparing employees for promotion only
   c) Avoiding supervisor involvement
   d) Increasing workload without purpose
3. What is the primary purpose of following data privacy rules?
   a) To keep customer information confidential and secure
   b) To reduce call handling time
   c) To speed up sales transactions
   d) To avoid paperwork
4. Continuous skill development is important because:
   a) It reduces the need for teamwork
   b) It ensures career growth and adaptability to new requirements
   c) It eliminates the need for supervisor reviews
   d) It allows employees to ignore organizational standards

**B. Short Questions:**

1. Explain how self-assessment helps in performance review discussions with supervisors.
2. Describe two effective ways to seek clarifications on job expectations.
3. Why is it necessary to adapt to evolving work processes in the telecom sector?

**C. True/False Statements:**

1. Implementing corrective actions from supervisors has no impact on work performance.
2. Adapting to new work processes ensures efficiency in a dynamic environment.
3. Performance reviews are conducted only to find employee mistakes.
4. Following security protocols is essential to protect customer data privacy.
5. Proactive learning and skill development contribute to career growth.

**D. Fill in the Blanks:**

1. ___________ reviews help track progress and identify areas for improvement.
2. Seeking ___________ on job expectations ensures clarity and better performance.
3. Adapting to evolving work processes is necessary to maintain ___________ in a dynamic environment.
4. Following security protocols and data privacy rules ensures the protection of ___________ information.

## Notes

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# 8. Maintaining Professional Appearance and Workplace Etiquette

Unit 8.1 - Maintaining Professional Appearance and Workplace Etiquette

TEL/N2217

## Key Learning Outcomes

**By the end of this module, the participants will be able to:**

1. Explain the importance of following prescribed uniform/dress code and grooming standards as per organizational guidelines.
2. Demonstrate how to wear and maintain the prescribed uniform and follow grooming standards as per company policies.
3. Describe the significance of maintaining personal hygiene and demonstrating professional etiquette in the workplace.
4. Show how to practice good personal hygiene and professional workplace etiquette.
5. Elucidate the standard operating procedures for wearing and displaying identification badges.
6. Demonstrate the correct way to wear and display identification badges as per organizational protocols.
7. Discuss best practices for greeting customers, understanding their concerns, and assisting them professionally.
8. Show how to greet customers courteously, understand their concerns, and provide relevant assistance.

# UNIT 8.1: Maintaining Professional Appearance and Workplace Etiquette

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the importance of following prescribed uniform/dress code and grooming standards as per organizational guidelines.
2. Demonstrate how to wear and maintain the prescribed uniform and follow grooming standards as per company policies.
3. Describe the significance of maintaining personal hygiene and demonstrating professional etiquette in the workplace.
4. Show how to practice good personal hygiene and professional workplace etiquette.
5. Elucidate the standard operating procedures for wearing and displaying identification badges.
6. Demonstrate the correct way to wear and display identification badges as per organizational protocols.
7. Discuss best practices for greeting customers, understanding their concerns, and assisting them professionally.
8. Show how to greet customers courteously, understand their concerns, and provide relevant assistance.

## 8.1.1 Following Prescribed Uniform and Grooming Standards

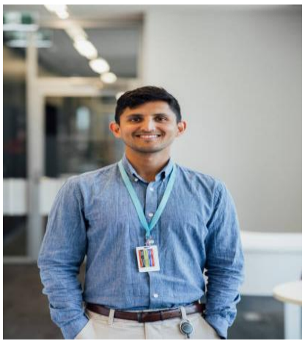
8.1.1 Following Prescribed Uniform and Grooming Standards

In the telecom and service industry, employees represent the face of the organization. The way a Customer Care Executive (CCE) or showroom staff dresses and maintains grooming directly influences customer perceptions, trust, and brand image. Following the prescribed uniform and grooming standards ensures professionalism, consistency, and discipline, while creating a positive first impression on customers. Adhering to these guidelines also reflects respect for company policies and enhances the overall workplace culture.

**1. Importance of Following Uniform and Grooming Standards**

| Aspect | Explanation / Example |
|---|---|
| Professional Image | Wearing a clean, well-maintained uniform projects professionalism. Example: A neatly ironed company-branded shirt signals seriousness. |
| Brand Identity | Uniforms create a sense of belonging and make employees easily identifiable to customers. Example: Telecom showroom executives in branded T-shirts/jackets. |
| Customer Trust | Customers feel confident when served by well-groomed and properly dressed staff. |
| Equality & Discipline | Uniforms eliminate differences in attire, promoting equality and discipline in the workplace. |
| Hygiene & Cleanliness | Proper grooming ensures a hygienic appearance, which is especially important in customer-facing roles. |
| Compliance with Policies | Following dress codes shows adherence to organizational standards and respect for company rules. |

**2. Wearing and Maintaining Uniform & Grooming Standards**

| Action | Correct Practice | Images |
|---|---|---|
| Uniform | Wear the prescribed company uniform daily; keep it neat, clean, and properly ironed. Example: Telecom-branded shirt with ID card visibly worn. |  |
| Footwear | Wear clean and formal/approved footwear as per company guidelines. Example: Black polished shoes, no casual sandals. |  |
| ID Card | Always display ID card at chest level; never keep it in a pocket or hidden. |  |
| Personal Hygiene | Maintain good hygiene: regular bath, trimmed nails, neat hair. Example: Hair tied neatly or kept professional. | |
| Grooming for Men | Shave regularly or maintain a trimmed beard, neat hairstyle, no strong perfumes. | |
| Grooming for Women | Neatly tied hair, minimal jewelry, light makeup as per policy, no flashy accessories. |  |
| Uniform Care | Wash and iron uniform regularly, replace worn-out items as per company rules. Example: Report to supervisor if uniform needs replacement. | |
| Body Language | Stand upright, smile, and maintain a friendly, approachable appearance while interacting with customers. | |

**3. Benefits of Maintaining Uniform and Grooming Standards**

- Builds customer confidence and satisfaction.
- Promotes professionalism and discipline at work.
- Enhances brand reputation through consistent employee appearance.
- Encourages a positive work culture with equality among staff.
- Creates opportunities for career growth by showcasing professionalism.

Following prescribed uniform/dress codes and grooming standards is much more than just a rule—it is a professional responsibility. Employees who maintain proper attire and grooming represent their company in the best light, improving customer experiences and strengthening brand image. Demonstrating professionalism in appearance reflects equally in the quality of service delivered.

## 8.1.2 Maintaining Personal Hygiene and Professional Etiquette in the Workplace

**1. Significance of Maintaining Personal Hygiene**

Personal hygiene plays a critical role in creating a healthy, safe, and professional work environment:

| Aspect | Significance |
|---|---|
| Health & Safety | Prevents spread of illness and infections, ensuring a healthy workplace. |
| Professional Image | A neat and clean appearance boosts confidence and reflects professionalism. |
| Customer Comfort | Customers feel comfortable when interacting with well-groomed and hygienic staff. |
| Workplace Morale | Promotes a positive environment and motivates colleagues. |
| Compliance | Many organizations include hygiene as part of health & safety standards. |

**2. Significance of Professional Etiquette**

Professional etiquette ensures respectful, efficient, and effective communication with colleagues, supervisors, and customers:

| Aspect | Significance |
|---|---|
| First Impressions | Polite greetings, respectful communication, and good manners establish trust. |
| Workplace Harmony | Etiquette promotes teamwork, reduces conflict, and encourages mutual respect. |
| Customer Experience | Courteous behavior and active listening improve customer satisfaction. |
| Career Growth | Good etiquette builds reputation and credibility, supporting career advancement. |
| Organizational Image | Employees' behavior reflects directly on the company's brand. |

**3. Practicing Good Personal Hygiene**

| Hygiene Practice | Demonstration |
|---|---|
| Daily Bathing | Bathe daily and use deodorant to stay fresh. |
| Oral Hygiene | Brush teeth twice daily, use mouthwash to avoid bad breath. |
| Hand Hygiene | Wash hands with soap/sanitizer before/after meals and after using washroom. |
| Clean Uniform | Wear freshly laundered, ironed uniform and polished shoes. |
| Hair & Nails | Keep hair neat, nails trimmed, avoid flashy hairstyles or dirty nails. |
| Overall Grooming | Use mild perfume, maintain a clean-shaven or trimmed look (for men). |

**4. Practicing Professional Etiquette in the Workplace**

| Etiquette Practice | Demonstration Example |
|---|---|
| Greeting | Say “Good Morning” to colleagues and “Welcome, how can I help you?” to customers. |
| Polite Communication | Use respectful words: “Please,” “Thank you,” “Excuse me.” |
| Active Listening | Maintain eye contact, nod, and avoid interrupting while others speak. |
| Respecting Time | Be punctual to work, meetings, and customer appointments. |
| Professional Body Language | Maintain a smile, stand/sit upright, avoid crossing arms. |
| Handling Conflict | Stay calm, use polite tone, escalate if necessary, as per company policy. |
| Workplace Conduct | Keep mobile phones silent, avoid gossip, respect cultural diversity. |

**5. Benefits of Hygiene & Etiquette**

- Improves customer trust and satisfaction.
- Enhances team collaboration.
- Projects a positive brand image of the organization.
- Boosts employee confidence and career growth.

## 8.1.3 Standard Operating Procedures for Wearing and Displaying Identification Badges

In a telecom or customer service environment, identification (ID) badges serve as a proof of identity, authority, and affiliation with the organization. Correct usage of ID badges ensures security, professionalism, and easy identification by customers, colleagues, and supervisors. Following standard operating procedures (SOPs) for displaying badges is essential to maintain workplace discipline and compliance with organizational rules.

**1. Importance of Wearing and Displaying ID Badges**

| Aspect | Significance / Example |
|---|---|
| Security | Helps restrict access to authorized personnel only. Example: Entry to server rooms or restricted areas requires visible ID badges. |
| Professional Identification | Customers and colleagues can identify staff quickly. Example: A Customer Care Executive wearing a badge with name and designation. |
| Accountability | Identifies the employee responsible for actions or service provided. |
| Compliance | Ensures adherence to company policies on security and uniform standards. |
| Brand Representation | Branded ID badges enhance the company’s professional image. |

### 2. Standard Operating Procedures (SOPs) for Wearing ID Badges

| Step | Procedure / Example |
|---|---|
| 1. Receive Badge | Collect ID badge from HR or administration at joining. |
| 2. Check Details | Ensure the badge contains correct name, designation, and photograph. |
| 3. Wear Badge on Uniform | Badge should be worn at chest level, on the left or right side as per company policy. |
| 4. Visibility | Badge must be clearly visible at all times while on duty; never keep in pocket or under clothing. |
| 5. Maintain Cleanliness | Keep badge clean, untarnished, and legible. |
| 6. Report Loss | Inform supervisor immediately if badge is lost or damaged for replacement. |
| 7. Return on Exit | Hand over badge to HR on resignation, transfer, or end of assignment. |

### 3. Correct Way to Wear and Display ID Badges

| Situation | Correct Action / Demonstration |
|---|---|
| Reporting to work | Wear badge on uniform before entering workplace. |
| Interacting with customers | Ensure badge is clearly visible, readable, and positioned upright. |
| Handling restricted areas | Badge should be accessible for verification by security personnel. |
| During breaks or meetings | Keep badge on uniform unless explicitly allowed to remove. |
| Damaged badge | Immediately request replacement from HR; do not attempt temporary fixes. |

### 4. Benefits of Following ID Badge SOPs

- Ensures workplace security and restricted access control.
- Promotes professionalism and easy identification.
- Enhances customer trust and organizational credibility.
- Prevents policy violations and accountability issues.
- Supports compliance with internal and legal requirements.

Wearing and displaying ID badges as per SOPs is a simple yet crucial responsibility. Correct badge usage ensures security, accountability, and professionalism while reflecting the organization's standards. Employees who consistently follow these procedures contribute to a safe, disciplined, and customer-friendly work environment.

## 8.1.4 Greeting Customers and Providing Professional Assistance

In the telecom and customer service environment, the first interaction with a customer sets the tone for the entire experience. Courteous greetings, active listening, and professional assistance are essential to build trust, ensure customer satisfaction, and enhance the organization's reputation. Effective customer interaction not only resolves queries efficiently but also strengthens customer loyalty and encourages repeat business.

**1. Best Practices for Greeting and Assisting Customers**

| Practice | Explanation / Example |
|---|---|
| Greet Customers Warmly | Use polite phrases like "Good Morning," "Welcome to [Company Name], how may I assist you today?" |
| Maintain Positive Body Language | Smile, make eye contact, and stand or sit upright to appear approachable. |
| Listen Actively | Pay full attention to the customer's concerns without interrupting; paraphrase to confirm understanding. Example: "So you're facing an issue with your internet speed, correct?" |
| Ask Relevant Questions | Clarify the problem using open-ended questions. Example: "When did you notice the slowdown?" |
| Provide Accurate Information | Share clear, concise, and correct guidance or solutions. Example: Explain steps to reset a router. |
| Offer Assistance Proactively | Suggest additional help if needed. Example: "I can also schedule a technician visit if the problem persists." |
| Follow Up When Necessary | Ensure the issue is resolved by checking in via call or message. |
| Maintain Professional Etiquette | Avoid slang, keep a calm tone, and show patience even with frustrated customers. |

**2. How to Greet and Assist Customers Professionally**

| Situation | Correct Action / Demonstration |
|---|---|
| Customer enters showroom | Smile, greet politely: "Good Morning! Welcome to ABC Telecom. How may I help you today?" |
| Customer explains a billing issue | Listen carefully, nod to show understanding, and ask clarifying questions: "Can you tell me the invoice number?" |
| Customer requests a new connection | Explain the process step-by-step and provide accurate timeline: "Your new connection will be activated within 48 hours after submitting documents." |
| Customer seems frustrated | Remain calm, empathize: "I understand your concern. Let me help you resolve this quickly." |
| Customer leaves satisfied | Thank the customer politely: "Thank you for visiting ABC Telecom. Have a great day!" |

3. Benefits of Proper Customer Greeting and Assistance

- Enhances customer satisfaction and loyalty.
- Projects a professional and trustworthy image of the company.
- Reduces miscommunication and repeated complaints.
- Encourages positive word-of-mouth and repeat business.
- Supports personal and professional growth of employees by improving interpersonal skills.

Greeting customers courteously, understanding their concerns, and providing professional assistance are core responsibilities of a Customer Care Executive. By combining politeness, active listening, and accurate guidance, employees can ensure high-quality customer service, strengthen brand reputation, and build long-term customer relationships.

## Exercise

**A. Multiple Choice Questions (MCQs):**

1. Why is following the prescribed uniform and grooming standards important in a telecom showroom?
   a) To show personal fashion choices
   b) To represent the company's professionalism and brand image
   c) To reduce the need for customer interaction
   d) To avoid wearing identification badges
2. Which of the following is an essential part of maintaining personal hygiene at work?
   a) Wearing excessive perfume
   b) Keeping nails trimmed and hands clean
   c) Avoiding the use of soap
   d) Ignoring grooming standards
3. What is the purpose of wearing and displaying identification badges?
   a) To access restricted areas and establish employee identity
   b) To decorate the uniform
   c) To avoid wearing uniforms
   d) To shorten the work shift
4. Which is the best practice while greeting a customer?
   a) Ignoring the customer until they ask a question
   b) Greeting politely, smiling, and offering assistance
   c) Asking personal questions unrelated to service
   d) Handing over brochures without interaction

**B. Short Questions:**

1. Explain why professional etiquette is important in customer interactions.
2. Describe the standard operating procedure for wearing and displaying an identification badge.
3. How does maintaining personal hygiene contribute to creating a positive workplace environment?

**C. True/False Statements:**

1. Wearing the prescribed uniform helps in maintaining a professional appearance.
2. Grooming standards are optional and depend on personal choice.
3. Identification badges must be worn and displayed as per organizational protocols.
4. Greeting customers politely helps in building trust and satisfaction.
5. Workplace etiquette includes respect, courtesy, and professional behavior.

**D. Fill in the Blanks:**

1. Wearing a ___________ uniform represents professionalism and adherence to company standards.
2. Grooming and ___________ are essential for maintaining a positive impression on customers.
3. Identification badges serve as proof of ___________ within the organization.
4. Greeting customers courteously and offering ___________ assistance reflects good professional etiquette.

# Notes

# 9. Organizing and Managing the Work Area Efficiently

Unit 9.1 - Logging, Recording, and Document Verification in Customer Service
Unit 9.2 - Service Efficiency, SLA Compliance, and Workload Management

TEL/N2217

## Key Learning Outcomes

**By the end of this module, the participants will be able to:**

1. Explain the standard procedures for logging customer queries, complaints, and service requests in CRM software or designated registers.
2. Demonstrate how to log customer queries, complaints, and service requests in CRM software or designated registers.
3. Describe the process of recording and updating daily customer interactions, service requests, and unit intake for repair/replacement.
4. Show how to accurately record and update customer interactions, service requests, and unit intake for repair/replacement.
5. Elucidate the importance of verifying and validating customer documents for service processing while ensuring compliance with company policies.
6. Demonstrate the process of verifying and validating customer documents for service processing while ensuring compliance with company policies.
7. Discuss the significance of monitoring turnaround time and adhering to Service Level Agreements (SLAs) for customer resolutions.
8. Show how to track turnaround time and adhere to SLAs for customer resolutions using digital tools.
9. Enlist the functions of key departments and escalation protocols for issue resolution.
10. Explain the use of digital tools, CRM applications, and reporting systems in streamlining customer service operations.
11. Demonstrate the effective use of CRM applications and reporting systems for data entry and customer service tracking.
12. Describe the importance of workload management in meeting productivity, service, and quality benchmarks.
13. Show how to manage workload efficiently to meet productivity, service, and quality benchmarks.

# UNIT 9.1: Logging, Recording, and Document Verification in Customer Service

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Explain the standard procedures for logging customer queries, complaints, and service requests in CRM software or designated registers.
2. Demonstrate how to log customer queries, complaints, and service requests in CRM software or designated registers.
3. Describe the process of recording and updating daily customer interactions, service requests, and unit intake for repair/replacement.
4. Show how to accurately record and update customer interactions, service requests, and unit intake for repair/replacement.
5. Elucidate the importance of verifying and validating customer documents for service processing while ensuring compliance with company policies.
6. Demonstrate the process of verifying and validating customer documents for service processing while ensuring compliance with company policies.

## 9.1.1 Logging Customer Queries, Complaints, and Service Requests

Accurate documentation of customer interactions is a critical aspect of customer service in the telecom sector. Logging queries, complaints, and service requests in CRM software or designated registers ensures timely resolution, accountability, and seamless communication between departments. Proper logging helps track customer issues, monitor follow-ups, and generate reports for performance analysis and service improvement.

**Steps to follow for logging customer queries/complaint/requests**

| Step | Procedure / Description | Example / Demonstration |
|---|---|---|
| 1. Receive Customer Request | Listen carefully to understand the customer's query, complaint, or service request. Ask clarifying questions if needed. | Customer calls and reports slow internet connectivity. |
| 2. Verify Customer Details | Collect essential information: name, contact number, account ID, service type, and location. | Customer's name: Rajesh Kumar; Account ID: 123456; Location: Patna. |
| 3. Identify Type of Interaction | Categorize the interaction as a Query, Complaint, or Service Request for proper tracking. | Slow internet → Complaint; Request for new SIM → Service Request. |
| 4. Access CRM or Register | Open the authorized CRM software or designated physical/digital register to log the interaction. | CRM dashboard or register opened to log new entry. |

| | | |
|---|---|---|
| 5. Enter Detailed Information | Record all relevant details accurately:<br>• Customer information (name, contact, account ID, service address)<br>• Date & time of interaction<br>• Type of interaction<br>• Detailed description of issue/request<br>• Immediate action taken | Customer reports slow internet: log name, account ID, call time, categorize as "Complaint," note troubleshooting steps given. |
| 6. Assign Priority and Responsible Owner | • Set priority: High / Medium / Low<br>• Assign to the appropriate department or person for resolution | Technical complaint → Technical Support Team; Billing discrepancy → Billing Team. |
| 7. Generate Ticket / Reference ID | • Create a unique ticket/reference number for tracking<br>• Share the ticket number with the customer | Ticket #12345 issued for slow internet complaint. |
| 8. Confirm Logging with Customer | • Inform the customer about the ticket number, expected resolution timeline, and follow-up procedure<br>• Maintain a polite and professional tone | "Your complaint has been logged as Ticket #12345. It will be resolved within 48 hours." |
| 9. Follow-Up and Update Status | • Continuously update CRM/register with actions taken and status changes (In Progress, Pending, Resolved) | Technical team updates ticket with resolution steps; status updated to "Resolved." |
| 10. Close Interaction | • Mark ticket/interaction as closed once resolved<br>• Record any customer feedback<br>• Maintain logs for reporting and future reference | Ticket #12345 closed; customer feedback recorded as "Satisfied." |

## 9.1.2 Recording and Updating Daily Interactions and Unit Intake

Accurate recording of all customer interactions (queries, service requests, and physical unit intake for repair) is mandatory for a Customer Care Executive. This process ensures that the organization has a reliable history of service provided, maintains accountability, and adheres to service level agreements (SLAs).

**1. The Process of Recording and Updating**

The overall process must adhere to three principles: Timeliness, Accuracy, and Completeness.

**A. Recording Customer Interactions (Queries and Service Requests)**

The recording process typically occurs in real-time using the Customer Relationship Management (CRM) software.

| Step | Action | Key Information Recorded |
|---|---|---|
| 1. Initiation | Acknowledge the customer contact (call, email, chat). | Start Time of Interaction, Channel (Phone, Email, etc.). |
| 2. Verification | Identify the customer and verify their identity and account status. | Customer ID, Account Status (Active/Inactive), Name. |
| 3. Log Creation | Create a new case or ticket (if it's a new issue) or open an existing one. | Unique Case ID, Date Logged, Priority (High/Medium/Low). |
| 4. Documentation | Record the customer's statement and the nature of the issue. | Issue Description: Specific, detailed narrative of the problem (e.g., "Dropped calls in Sector 5," "Incorrect ₹500 charge on bill"). |
| 5. Action/Resolution | Note the immediate steps taken (troubleshooting, advice, information given). | Action Taken: "Troubleshooting performed," "Referred to FAQ," "Solution provided." |
| 6. Status Update | Change the status immediately based on the outcome. | Status: Resolved (if fixed), Pending (if waiting for customer info), or Escalated (if passed to a specialist). |

**B. Unit Intake Process (for Repair/Replacement)**

When a customer physically brings a faulty device (e.g., router, set-top box, mobile phone) for repair or replacement, an additional, crucial logging process must be followed to track the physical asset.

1. Verify Service Request (SR): The customer must usually have an existing Service Request (or case ID) logged in the CRM before a physical unit is accepted.
2. Physical Inspection: The executive must visually inspect the unit and note its condition (scratches, water damage, missing accessories). This detail is critical to avoid future disputes.
3. Serial Number Matching: Record the unit's Serial Number (S/N) and ensure it matches the S/N recorded in the customer's account profile (if applicable).
4. Create a Repair Order (RO) or Intake Log: In the CRM, create a separate Repair Order linked to the customer's main case ID. This RO must include:
   - Unit Model and S/N.
   - Observed Fault (e.g., "Screen dead," "No power").
   - Condition Notes (from the inspection).
   - List of accessories received (e.g., "Unit only," "Unit + Charger").
5. Generate Intake Receipt: Print or generate a digital receipt for the customer acknowledging the acceptance of the physical unit and its condition. This receipt must show the new Repair Order (RO) number and the expected turnaround time.
6. Update Physical Status: The CRM status of the unit intake must be updated from New Request to Unit Received - Awaiting Technical Review.

**2. Accurately Recording and Updating**

- Scenario: Logging an Escalated Technical Complaint
- Customer Issue: Mr. Arjun (ID: 987654) calls, reporting that his fiber broadband keeps dropping connectivity every 15 minutes, despite trying basic restarts himself.

| Action Point | Executive Logging Procedure | CRM Field/Note |
|---|---|---|
| 1. Initial Log | Create a new Case/Ticket ID (e.g., CCE-94021) in the CRM, linking it to Mr. Arjun's account. | Case Title: Intermittent Connectivity Drops - S/R 987654.<br>Case Type: Technical Complaint.<br>Priority: Medium. |
| 2. Detailed Description | Record the specific nature of the problem, including the customer's troubleshooting efforts. | Description: "Customer reports internet drops every ~15 minutes. Attempted to restart router and factory reset, issue persists. Line seems stable when working." |
| 3. Action Taken (Troubleshooting) | Check the line diagnostics tool in the CRM. Note the initial findings. | Action Note 1: "Checked CRM diagnostics; line voltage appears normal, but logged several recent disconnection events matching customer's timeline." |
| 4. Escalation | Since basic troubleshooting failed, escalate the issue to the Level 2 Technical Team (or Field Support). | Action Note 2: "Escalated to L2 Technical Support for remote port check/firmware upgrade." Assigned To: L2 Team, Tech Specialist A. |
| 5. Status Update | Change the case status to reflect that the issue is now with another team. | Status: Pending Technical Escalation. |
| 6. Follow-up Reminder | Set a reminder for yourself to check the status or call the customer back within the SLA window (e.g., 24 hours). | Follow-up Note: "Set reminder for 10:00 AM tomorrow to check L2 resolution status and update customer." |
| 7. Final Update (Resolution) | Once the L2 Team updates the case (e.g., "Replaced outdoor cable," "Issue Resolved"), change the final status. | Status: Resolved - Monitoring. Resolution Note: "L2 reported faulty cabling replaced. Tested speed OK. Contacted customer and confirmed services are restored." |

## 9.1.3 Document Verification and Compliance

When a customer signs up for a new service, upgrades their plan, or requests a transfer of ownership, verifying supporting documents is critical. This process ensures legal compliance and protects both the customer and the company from fraud.

**A. Importance of Verification and Validation**

Document verification is non-negotiable in the telecom industry for several key reasons:

- **Regulatory and KYC Compliance:** Telecom companies are legally required to perform Know Your Customer (KYC) checks to confirm a customer's identity and address. Failing this leads to heavy government penalties.
- **Fraud Prevention:** Validating identity and address proofs (Aadhaar, Passport, Utility Bills, etc.) prevents fraudulent connections, which can be used for illegal activities, thereby protecting the company's network and reputation.
- Service Accuracy: Ensures that the correct service is being provided to the correct individual at the verified address. This prevents service installation errors or incorrect billing.
- Policy Adherence: Ensures every transaction aligns with company policies, such as age limits for service agreements, proof of relationship for family plans, or required documents for corporate accounts.

**B. Document Verification Workflow**

The process below demonstrates how a Customer Care Executive verifies a document received from a customer, ensuring it meets all compliance standards.

| Step | Action | Compliance Check/Policy Adherence |
|---|---|---|
| 1. Request and Receive | Specify only the required documents as per policy for the service (e.g., Proof of Identity and Proof of Address). Receive the documents (digital copy or physical). | Policy Check: Ensure the document types are those listed in the official company KYC manual. Avoid accepting outdated or unofficial proofs. |
| 2. Authenticity & Legibility Check | Examine the document for legibility (is the text clear?) and authenticity (is it a photocopy, an original, or a manipulated image?). | Fraud Check: Look for signs of tampering, mismatched fonts, or blurry photos. For physical documents, check for original watermarks/seals. |
| 3. Validation Against Profile | Compare the details on the document (Name, Date of Birth, Address) against the data already entered in the CRM system. | Data Integrity Check: Names must match exactly. The address on the proof must match the service installation address. |
| 4. Time-Bound Check | Check the validity period of the document (e.g., passports must not be expired; utility bills must be less than 90 days old). | Regulatory Compliance: Adhere to government mandates for how recent address proofs must be. |
| 5. Final Action and Logging | If all checks pass, Approve the document in the CRM and attach the file to the customer's case ID. If checks fail, Reject the document and clearly inform the customer why it was rejected. | Audit Trail: Log the date and time of verification, the name of the executive who verified it, and whether it was approved or rejected. |

# Notes

# UNIT 9.2: Service Efficiency, SLA Compliance, and Workload Management

## Unit Objectives

**By the end of this unit, the participants will be able to:**

1. Discuss the significance of monitoring turnaround time and adhering to Service Level Agreements (SLAs) for customer resolutions.
2. Show how to track turnaround time and adhere to SLAs for customer resolutions using digital tools.
3. Enlist the functions of key departments and escalation protocols for issue resolution.
4. Explain the use of digital tools, CRM applications, and reporting systems in streamlining customer service operations.
5. Demonstrate the effective use of CRM applications and reporting systems for data entry and customer service tracking.
6. Describe the importance of workload management in meeting productivity, service, and quality benchmarks.
7. Show how to manage workload efficiently to meet productivity, service, and quality benchmarks.

## 9.2.1 Significance of Monitoring Turnaround Time (TAT) and Adhering to SLAs

Turnaround Time (TAT) is the total time taken from when a customer issue or service request is logged to the moment it is fully resolved. Service Level Agreements (SLAs) are formal commitments (internal or external) defining the specific timeframes and quality standards for resolution.

**1. Enhancing Customer Satisfaction and Trust**

- Meeting Expectations: Customers expect prompt resolution. When you adhere to an SLA (e.g., "all technical complaints resolved within 48 hours"), you meet or exceed those expectations, leading to high customer satisfaction scores.
- Building Trust: Consistently meeting SLAs demonstrates reliability and professionalism. This builds long-term customer loyalty and reduces the rate of customer churn (customers switching to competitors).
- Preventing Escalation: A monitored TAT ensures issues are resolved quickly, preventing the customer from calling back multiple times or escalating the complaint to higher management or regulatory bodies.

**2. Ensuring Operational Efficiency**

- Resource Planning: By tracking TAT, the management can identify bottlenecks in the process. For instance, if technical complaints consistently exceed the 48-hour SLA, it indicates a need for more Level 2 technicians or better training.
- Performance Measurement: SLAs serve as clear, measurable metrics for evaluating the performance of individual Customer Care Executives and entire teams. This provides objective data for appraisals and improvement plans.

**3. Compliance and Regulatory Adherence**

- **Regulatory Fines:** In the telecom sector, many countries have specific regulations regarding complaint resolution timelines (e.g., resolving billing disputes within a set number of days). Failing to meet these regulatory SLAs can result in substantial financial penalties and legal issues.
- **Contractual Obligations:** For corporate or high-value customers, SLAs are often legally binding contracts. Breach of these agreements can lead to compensation claims and loss of lucrative contracts.

**4. Protecting Company Reputation**

- **Managing Negative Feedback:** Slow resolution times are the primary driver of negative online reviews and social media complaints. Adhering to SLAs ensures that negative feedback is minimized and that any issues are publicly seen as being managed responsibly and promptly.

In summary, monitoring TAT and adhering to SLAs is not just about following rules; it's about translating customer requirements into measurable goals that drive operational excellence, legal safety, and business success.

## 9.2.2 Tracking Turnaround Time (TAT) and Adhering to SLAs

Digital tools, primarily the CRM system, automate the calculation and monitoring of resolution times, providing real-time alerts to executives.

**A. How TAT and SLA are Calculated in CRM**

- **Start Time:** The clock for TAT and SLA starts precisely at the moment the case is logged and assigned a status of Open or Pending.
- **Stop Time:** The clock stops the moment the executive changes the status to a final resolution status, such as Resolved, Closed, or Completed.
- **Calculation:** TAT = Stop Time - Start Time. (The system usually calculates this in business hours, excluding weekends/holidays).

**B. Real-Time SLA Monitoring in CRM**

Let's use the example of an SLA set for different priority levels:

| Priority | Issue Type | SLA Target (Resolution) |
|---|---|---|
| High | Full-service outage | 4 Hours |
| Medium | Intermittent technical issue | 24 Hours |
| Low | General billing query | 48 Hours |

| Executive Action | CRM System Response/Functionality | Purpose |
|---|---|---|
| Case Creation | When the case is logged as Priority: Medium, the system automatically stamps the SLA Due Time (e.g., 24 hours from the start time). | Establishes the target time immediately. |
| Time Tracking | A dynamic SLA Timer begins running on the case dashboard (e.g., "Time Remaining: 23:55:00"). | Provides a visual, real-time indicator of urgency. |
| Violation Warning | When the case is within a threshold (e.g., 4 hours from the deadline), the CRM dashboard changes the case row color to Amber (Yellow) and sends an email/pop-up alert. | Prompts the assigned executive to prioritize the case before breach. |
| SLA Breach | If the resolution time exceeds the SLA, the timer turns Red, and the case is automatically flagged as 'SLA Violated'. An automated email is sent to the team supervisor for immediate action. | Ensures accountability and triggers management intervention to prevent further delay. |
| Resolution Log | When the executive changes the status to Resolved, the system records the final resolution time and whether the SLA was met or violated. | Creates an auditable record of the outcome for performance reporting. |

By relying on the automated CRM functions, the Customer Care Executive ensures that every case is handled with the appropriate urgency and that the company's commitment to prompt service is met.

## 9.2.3 Escalation Protocols and Department Functions

When a Customer Care Executive (CCE), known as Level 1 Support, cannot resolve an issue, they must escalate it to a specialized team. Escalation ensures the customer receives expert assistance without delay.

**A. Standard Escalation Levels (L1, L2, L3)**

Issue resolution typically follows a tiered support model defined by increasing levels of technical complexity:

| Level | Role | Responsibility and Function | Escalation Criteria |
|---|---|---|---|
| L1 (You) | Customer Care Executive | First point of contact. Responsible for basic troubleshooting, handling common queries, logging cases accurately, and processing standard service requests. | Inability to resolve the issue using available knowledge base or tools, or when the issue requires specialist access. |
| L2 | Technical Specialist/Field Dispatch Team | Handles complex issues requiring deeper technical knowledge, network access, or physical site visits (e.g., advanced line diagnostics, server restarts, on-site cable repair). | L1 determines a network/device fault that requires specialist investigation or physical intervention. |
| L3 | Network Engineering/Product Development | Handles highly complex, unique, or systemic issues (e.g., core network outages, major system bugs, product design flaws). | L2 confirms the issue is not localized or requires changes to core infrastructure or software. |

**B. Functions of Key Supporting Departments**

The CCE must know which department handles which type of escalated case to ensure the issue is routed correctly and the SLA clock continues to run efficiently.

| Department | Primary Function | Types of Issues Escalated |
|---|---|---|
| Technical Operations (NOC/Field) | Manages network health, infrastructure maintenance, and system stability. | No service/total outage, intermittent connectivity, slow speed, physical cable damage, equipment failure diagnosis. |
| Billing and Finance | Handles all aspects of customer invoicing, payments, and credit/debit adjustments. | Incorrect charges, refund requests, payment processing failures, applying discounts or promotional credits. |
| Sales and Retention | Focuses on upgrading services, contract renewal, and preventing customer churn (cancellation). | Customer threatening to cancel service, requests for special pricing, complex plan changes, win-back offers for inactive customers. |
| Logistics/Warehouse | Manages the inventory, repair, and replacement of customer equipment (modems, set-top boxes). | Tracking repair status of submitted equipment, verifying stock availability for new installations or replacements. |

By accurately identifying the nature of the escalated issue and routing it to the correct specialized department, the CCE ensures the customer's issue is resolved efficiently and within the defined SLA.

## 9.2.4 Digital Tools, CRM Applications, and Reporting Systems in Streamlining Customer Service Operations

Digital tools are essential in modern customer service because they transform a complex, multi-departmental process into a unified, efficient workflow.

**1. CRM Applications (Customer Relationship Management)**

The CRM is the foundational digital tool, acting as the central nervous system for all customer interactions:

- Centralized Data and History: The CRM collects all interactions, service requests, and billing history in one place. This allows the Customer Care Executive (CCE) to instantly verify the customer's identity, review past issues, and avoid asking the customer to repeat information, significantly speeding up the troubleshooting process (as seen in Section 2 of the Canvas).
- Real-Time Logging and Task Management: It ensures mandatory logging procedures (Section 1) are followed accurately. It automatically assigns case IDs, tracks the owner of the issue, and facilitates seamless transfer during escalation (Section 5) without losing critical details.
- SLA Enforcement: As demonstrated in Section 4, the CRM automates the calculation of Turnaround Time (TAT) and tracks Service Level Agreements (SLAs). It provides visual warnings (Amber/Red alerts) and escalates the issue automatically upon breach, ensuring that the promise of timely resolution is met.

**2. Digital Tools and Automation**

Digital tools extend the capabilities of the CRM to handle non-voice interactions and administrative tasks:

- **Process Consistency:** They enforce compliance rules, such as the document verification workflow (Section 3), by often requiring mandatory fields to be filled or documents to be uploaded before a case can proceed, minimizing human error.
- **Automated Communication:** Tools handle routine updates, sending automated SMS or emails to customers with case IDs, status changes, or repair tracking information, freeing up the CCE to focus on complex resolutions.

**3. Reporting Systems**

Reporting systems take the raw data logged in the CRM and convert it into actionable insights for management:

- Identifying Systemic Issues: By analyzing high volumes of cases, reports highlight recurring technical faults, common customer pain points, or departments (Section 5) that are frequent bottlenecks in the escalation process. This drives process improvement.
- Performance Tracking: Reports provide metrics on individual and team performance, particularly by showing the SLA Adherence Rate (how often SLAs are met) and Average TAT. This data is crucial for coaching and training CCEs.
- Forecasting: Analyzing trends in service requests helps the company forecast staffing needs, optimize network capacity, and better manage inventory (Logistics/Warehouse department).

In essence, these digital tools streamline operations by providing visibility (knowing the issue status), accountability (tracking who owns the resolution), and speed (using automation and centralized data).

## 9.2.5 Effective Use of CRM and Reporting Systems

Effective use of digital tools is the skill that ties together all customer service operations, turning raw data into actionable results.

**A. CRM for Data Entry and Tracking**

The CCE uses the CRM daily for two primary, linked purposes: accurate data entry and efficient tracking.

**1. Data Entry for Accuracy and Audit**

| Action | CRM Function | Impact on Service Tracking |
|---|---|---|
| Standardizing Description | Uses pre-defined drop-down menus for fields like Issue Type (e.g., 'Payment Failure', 'No Signal') instead of free text. | Ensures consistency. Data can be reliably aggregated by the reporting system to identify top failure points. |
| Mandatory Fields | The CRM requires fields like Priority, Serial Number, and Resolution Code before the case can be saved or closed. | Prevents incomplete logging. Ensures critical information needed by L2/L3 teams is always present. |
| Resolution Codes | Upon resolving, the CCE selects a specific code (e.g., 'Troubleshooting Successful', 'Billing Adjustment Applied'). | Facilitates managerial review. Allows the reporting system to accurately track the effectiveness of the resolution method. |

**2. CRM Dashboard for Tracking and Prioritization**

The CCE relies on a customized dashboard to manage their workload efficiently:

- Active Cases List: Displays all cases currently assigned to the CCE. This list is automatically sorted by SLA Countdown Timer. The CCE always works on the case with the least time remaining before the SLA breach.
- Case Ownership: The CCE can quickly filter to see cases that are currently with L2 or Field Support but still require a Customer Follow-up. This prevents cases from stalling and ensures the customer is kept informed.
- Search Functionality: The CCE uses the search bar not just for Account ID, but for Case ID (provided to the customer) to give quick status updates, thus reducing hold time.

**B. Reporting Systems for Insight**

Every log entry by the CCE feeds a central data warehouse, which generates reports for management. The accuracy of the CCE's data entry directly affects the quality of these reports.

| Report Type | Purpose/Insight Provided | Data Points Required (from CCE Logging) |
|---|---|---|
| SLA Adherence Report | Shows the percentage of cases resolved within the agreed-upon SLA for each team. | Start Time, Stop Time, Status (Resolved), Priority Level. (Directly relies on accurate time stamping). |
| First Call Resolution (FCR) Report | Measures the number of issues solved during the customer's first contact, indicating CCE efficiency. | Interaction Count, Resolution Status. (Relies on the CCE correctly marking initial contact as 'Resolved'). |
| Root Cause Analysis Report | Identifies the top 5 recurring reasons for service failures across the network. | Issue Description, Issue Type (from drop-down), Resolution Code. (Requires CCE to consistently use standard logging categories). |

By ensuring accurate data entry and utilizing the tracking features of the CRM, the Customer Care Executive plays a direct and vital role in the company's continuous improvement cycle.

## 9.2.6 Workload Management for Productivity and Quality

Effective workload management is the key practice that allows a Customer Care Executive (CCE) to consistently meet all business targets—productivity, service speed (SLA), and resolution quality.

**A. Importance of Workload Management**

| Benchmark | Importance of Workload Management |
|---|---|
| Productivity | Efficient organization ensures the CCE closes the maximum number of cases per day without unnecessary delays or context switching. It helps meet targets like Cases Closed per Day. |
| Service (Speed) | Proper prioritization, often using the CRM's built-in SLA timers, ensures that high-priority cases and those nearing the SLA deadline are addressed first, preventing service breaches. |
| Quality | A manageable workload prevents rushing. Rushing leads to incomplete logging, incorrect troubleshooting, and choosing the wrong resolution codes, which negatively impacts reporting and customer satisfaction. |
| Executive Well-being | Proactive management reduces stress and prevents burnout, leading to better focus, fewer errors, and higher job satisfaction. |

**B. Efficient Workload Management**

The CCE should follow a structured approach daily to manage their queue:

| Management Technique | CCE Action | Resulting Benchmark Improvement |
|---|---|---|
| 1. Prioritize by Deadline (SLA) | Upon starting the shift, filter the Active Cases List (Section 6) by the SLA Countdown Timer. Begin work on the oldest, highest-priority case first, regardless of the issue type. | Meets Service (SLA) Benchmarks. Ensures no critical case is breached due to poor time management. |
| 2. Batch Processing | Group similar low-priority tasks together. For example, dedicate 30 minutes in the morning and 30 minutes in the afternoon solely to checking and responding to Pending Customer Follow-up emails. | Improves Productivity. Reduces the time lost to context switching (moving from a phone call to an email to an internal chat). |
| 3. 'Triage and Handover' Check | Review all recently escalated cases (Status: Pending Escalation). Verify the L2/L3 team has accepted ownership. If not, chase the transfer, ensuring the case clock does not unnecessarily tick against the CCE's name. | Improves Quality and Service. Ensures continuous movement on the case and accountability by the specialized team. |
| 4. Administrative Time Blocking | Reserve a small, dedicated time slot (e.g., 15 minutes) for non-case activities like updating personal knowledge articles, team training, or clearing the physical desk. | Improves Quality. Prevents administrative clutter from interfering with high-stakes resolution tasks. |

By employing these techniques, the Customer Care Executive transforms their workload from a chaotic stream of tasks into a prioritized, measurable queue, enabling them to meet complex service requirements consistently.

## Exercise

**A. Multiple Choice Questions (MCQs):**

1. What is the primary purpose of logging customer queries and complaints in CRM software?
   a) To delay resolution
   b) To ensure accurate tracking, timely resolution, and compliance
   c) To reduce the number of calls
   d) To avoid contacting the customer
2. Why is it important to verify and validate customer documents before processing a service request?
   a) To meet compliance and prevent errors
   b) To reduce paperwork
   c) To speed up unrelated processes
   d) To avoid attending the customer
3. Monitoring turnaround time (TAT) and adhering to Service Level Agreements (SLAs) ensures:
   a) Delayed customer resolutions
   b) Compliance, efficiency, and customer satisfaction
   c) Increased workload only
   d) Avoidance of CRM usage
4. How do CRM applications and reporting systems help in customer service operations?
   a) By automating data entry and tracking customer interactions
   b) By replacing human customer service entirely
   c) By slowing down query resolution
   d) By avoiding adherence to SLAs

**B. Short Questions:**

1. Explain the standard procedure for logging customer complaints and service requests in CRM software.
2. Describe how to track and manage turnaround time for customer resolutions.
3. Why is workload management important in meeting service and productivity benchmarks?

**C. True/False Statements:**

1. Accurate recording of customer interactions ensures timely follow-up and resolution.
2. Service Level Agreements (SLAs) are optional guidelines for resolving customer issues.
3. Verifying customer documents before service processing is crucial for compliance.
4. CRM applications cannot be used for monitoring service requests.
5. Efficient workload management helps achieve quality and productivity benchmarks.

**D. Fill in the Blanks:**

1. Logging customer queries, complaints, and service requests accurately ensures proper ___________.
2. Monitoring ___________ and adhering to SLAs is essential for timely customer resolution.
3. CRM applications and reporting systems streamline ___________ operations and data tracking.
4. Managing workload efficiently ensures productivity, service, and ___________ benchmarks are met.

## Notes

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& ENTREPRENEURSHIP

# 10. Employability Skills (30 Hours)

Telecom Sector Skill Council

It is recommended that all training include the appropriate. Employability Skills Module. Content for the same can be accessed https://www.skillindiadigital.gov.in/content/list

DGT/VSQ/N0101

# 11. Annexure

Annexure I - QR Codes –Video Links

# Annexure I

## List of QR Codes

| Module No. | Unit No. | Topic Name | Link for QR Code (s) | QR code (s) |
|---|---|---|---|---|
| **Module 1: Introduction to the Role and Respon-sibilities of a Customer Care Execu-tive** | Unit 1.1: Intro-duction to the Program | Main Activ- ities Performed by a Customer Care Executive | https://youtu.be/f2wOM-wCKhUo | Main Activities Performed by a Customer Care Executive |
| | Unit 1.2: Tele-com Sector in India | Overview of the Telecom Sector in India | https://youtu.be/Cag-bc-bivtM | Overview of the Telecom Sector in India |
| | | Regulato- ry Authorities in the Telecom Industry | https://youtu.be/VeoHhk-jV6qo | Regulatory Authorities in the Telecom Industry |
| | Unit 1.3: Role of a Customer Care Executive | Roles and Responsibilities of Customer Care Executive | https://youtu.be/Ojq8Eo-6tOxA | Roles and Re-sponsibilities of Customer Care Executive |

| Module No. | Unit No. | Topic Name | Link for QR Code (s) | QR code (s) |
|---|---|---|---|---|
| | | Depart- ments in a Call Center | https://youtu.be/lnWsPxT-8m5M | Departments in a Call Center |
| Module 2: Managing Customer Interactions and Query Resolution | Unit 2.1: Customer Service Procedures and Communication | Open-Ended Questions and Close-Ended Questions | https://youtu.be/pxCdJtk5Ddc | Open-Ended Questions and Close-Ended Questions |
| | | Impor- tance of Log- ging Customer Enquiries | https://youtu.be/-ElyOVX2lsA | Turnaround Time (TAT) / Response Time |
| | Unit 2.1: Customer Service Procedures and Communication | Concept of Customer Service | https://youtu.be/aD6cPfjXLn0 | Concept of Cus- tomer Service |
| | Unit 2.3: Resolution, Prioritization, and Escalation | Respond- ing to Customer Questions | https://youtu.be/FKyAD7vYk1k | Responding to Customer Ques- tions |

| Module No. | Unit No. | Topic Name | Link for QR Code (s) | QR code (s) |
|---|---|---|---|---|
| | Unit 2.2: Logging, Documentation, and CRM Usage | Introduc- tion to CRM | https://youtu.be/T3cpQio764U | Introduction to CRM |
| | | What is Intranet? | https://www.youtube.com/watch?v=32kNBatACsI | What is In- tranet? |
| **Module 4: Customer Engagement and Relationship Building** | Unit 4.1: Professional Customer Interaction and Requirement Analysis | Customer Categorization | https://youtu.be/jAEzYBM-WTrA | Customer Cate- gorization |
| | Unit 4.3: Customer Retention, Complaint Handling, and Service Standards | First Call Resolution | https://youtu.be/LU58V_vuc5Q | First Call Reso- lution |
| **Module- 6: Tracking and Evaluating Self-Performance** | Unit 5.1: Tracking and Evaluating Self-Performance | Process- es related to the collection and bad debt recovery | https://www.youtube.com/watch?v=JfYorh4jv2o | Processes relat- ed to the col- lection and bad debt recovery |

| Module No. | Unit No. | Topic Name | Link for QR Code (s) | QR code (s) |
|---|---|---|---|---|
| **Module 9: Organizing and Managing the Work Area Efficiently** | Unit 9.2: Service Efficiency, SLA Compliance, and Workload Management | Grooming and Appear- ance | https://youtu.be/FBWcK-pZwDYA | Grooming and Appearance |

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