puzzel. Solving Customer Interactions

Training and Consultancy

Agent Application Training

Agents will learn top tips from our experienced trainer on how to build their skills, get the most out of your platform, and reach your organisation’s full potential.

Target Audience

Contact centre agents and other Agent Application users.

Overview

This course equips agents with the knowledge and skills they need to become confident users of Puzzel’s Agent Application. Participants will explore the key features of the platform and learn how these can support them in their role, with demonstrations and activities throughout.

Objectives

By the end of the session, attendees will be able to:

- Sign in and demonstrate how to log in and log out of different profiles.
- Demonstrate how to receive and make a call through the application.
- Understand how to forward a call.
- Practice how to receive and respond to written requests.
- Identify different tabs and build a dashboard with relevant tabs.
- Learn how to receive a webchat and interact with a customer.
- Recognise the different tabs in Agent Assist.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 1.5 hours

Group Size per Session

- 1 to 15 attendees

agent_application_training.pdf

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Agent Case Management Training

Agents will develop their ticketing skills through group activities and real-life scenarios led by our experienced trainer.

Target Audience

Contact centre agents or staff handling tickets through Puzzel Case Management platform.

Overview

This course provides agents with the practical knowledge they need to successfully use Puzzel's Case Management platform. Participants will learn how to manage tickets, reply, forward, search, add notes attributes and attachments, utilise their address book and dashboard. This training includes a blend of comprehension, analytical study, and hands-on experience.

Objectives

By the end of the session, attendees will be able to:

- Demonstrate how to use and navigate the Puzzel Case Management (Ticketing) platform.
- Manage a personal address book and understand how to store and edit contacts.
- Forward tickets to other agents.
- Add attachments and attributes to agents.
- Demonstrate functionality of the platform.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2.5 hours

Group Size per Session

- 1 to 15 attendees

agent_case_management.pdf

Agent Dialler Training

This session starts off with a tour from the Agents perspective exploring the modes and functionality of this great tool. Part two gives your learners key insights into building a campaign as they critique the approach in a step by step process.

Target Audience

This training is split into 2 concurrent sessions. First part- Contact Centre agents and other Dialler users. Second part- Team leaders, supervisors, managers and administrators.

Overview

This course provides you with the practical knowledge of this highly versatile outbound call system. The session walks through a variety of campaign modes including preview, progressive, power or predictive, demonstrates the uploading of campaign calls lists, analyses the call blending to combine inbound and outbound calls in a seamless manner. Demonstrations and activities are throughout the session.

Objectives

By the end of the session, agents will be able to:

- Recognise the different functions of the Dialler area of the platform.
- Discuss and recall the differences between a standard call and a dialler call
- Execute a call end to end including the “Enquiry Registration”.

By the end of the session, admins will be able to:

- Apply the settings needed to set up a new campaign.
- Differentiate between new and existing Campaigns.
- Execute a call end to end including the “Enquiry Registration”.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2 hours

Group Size per Session

- 1 to 15 attendees

[agent_dialler.pdf]

Agent Digital Engagement Live Share Training

Agents will learn tips to build their skills and knowledge and interact with the customer in a seamless way.

Target Audience

Contact Centre agents and other Digital Engagement users.

Overview

This course provides you with the practical knowledge and skills you need to confidentially use the Digital Engagement area of the platform. Participants will explore the key areas of Live-share, and learn how be intuitive and engaging when they are interacting with their customers. Demonstrations and activities take place throughout the session.

Objectives

By the end of the session, attendees will be able to:

- Reveal how to screen share and initiate a video feed with a customer.
- Demonstrate the different ways to respond to customers using the Cobrowse and Video Share functions.
- Sign in and execute how to initiate Live Share with a customer via Chat and Voice.
- Use the various collaboration tools and pre-defined messages within the application to bring your conversation to greater heights.
- Recognise the needs of the customer and be able to explain how to navigate the options on their side of the interaction.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 1 hour

Group Size per Session

- 1 to 15 attendees

admin_portal.pdf

Administration Portal Training

Our step-by-step programme will teach managers how to administer their solution, understand the key features, and use our resource pack to test their knowledge as they go.

Target Audience

Team leaders, supervisors, managers, administrators, and engineers.

Overview

This course provides contact centre leaders with the theoretical and practical knowledge they need to successfully manage and configure the Administration Portal. Participants will explore the key features of the portal, including queues, wallboards and tickers and learn how these can support them in their role.

Objectives

By the end of the session, attendees will be able to:

- Set up skills, queues, and queue display settings.
- Demonstrate how to set up users, user groups and profile templates.
- Edit time and audio modules.
- Configure and manage access control.
- Navigate the core tabs within the platform.
- Create and run basic reports.
- Demonstrate the ability to use the features within the services tabs.
- Create and modify dashboards to provide a holistic view of current performance.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 1 day

Group Size per Session

- 1 to 8 attendees

[admin_knowledgebase.pdf]

Administration Knowledgebase Training

Our session swaps hints and tips so that learners take away ideas on how to build up their knowledgebase into a great resource that can be used by their teams.

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Target Audience

Team leaders, supervisors, managers, and administrators of the Administration Portal.

Overview

This course provides you with the practical knowledge and skills you need to confidentially use the Knowledgebase area of the platform. You will explore how to create and edit articles for your platform, how to categorize them into different areas and sort and filter your information so that it becomes a great resource area for your teams. Demonstrations and activities are throughout the session.

Objectives

By the end of the session, attendees will be able to:

- Recognize the key features of the knowledgebase.
- Locate the knowledgebase dashboard.
- Create, edit, and delete articles.
- Label and categorize the articles.
- Execute publishing and unpublishing articles.
- Experiment rating the articles.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2 hours

Group Size per Session

- 1 to 8 attendees

[admin_case_management.pdf]

Administration Case Management Training

Managers will explore Puzzel's Case Management platform and learn how to achieve and maintain a great team set-up for your organisation.

Target Audience

Team leaders, supervisors, managers, and administrators.

Overview

This course provides administrators with the skills they need to manage and maintain their Puzzel Case Management system. Participants will learn how to get around the platform, explore and understand all the key areas including General System Settings, Channel Settings, Working Hours, Teams, Production Rules, User Settings, System and Team Roles, Dashboard, Categories and Forms. Demonstrations and discussions throughout.

Objectives

By the end of the session, attendees will be able to:

- Demonstrate how to use and navigate the Puzzel Case Management (Ticketing)
- platform.
- Manage system permissions.
- Demonstrate channel management.
- Allocate tickets to other agents.
- Understand how to work with GDPR requirements.
- Demonstrate ticket management.
- Organise working hour schedules.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 1 Day

Group Size per Session

- 1 to 8 attendees

admin_case_management.pdf

Administration Statistics Training

Our experienced trainer will guide you through Puzzel's reporting functionality, with expert tips tailored to your business.

Target Audience

Team leaders, supervisors, managers, and administrators.

Overview

This course explores the different types of standard reports available in the Puzzel Customer Service Platform. Using their own portal, participants will learn the three tiers of reporting, as well as how to set reporting periods and subscriptions. Each person will take away a basic knowledge of creating both standard and customised reports and the ability to analyse their data.

Objectives

By the end of the session, attendees will be able to:

- Demonstrate how to download a standard report.
- Understand the difference between the three tiers of reporting.
- Run numerous standard reports.
- Create a subscription report.
- Create a custom report.
- Generate automated reports for your teams.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2 hours

Group Size per Session

- 1 to 8 attendees

[admin_statistics.pdf]

Administration Digital Engagement System Training

Administrators and managers will explore the Digital Engagement Admin Portal and acquire advice and ideas to achieve and maintain a great team setup for your organisation.

Target Audience

Team leaders, supervisors, managers, and administrators of the Admin Portal.

Overview

This course provides you with the practical knowledge and skills you need to confidentially navigate around the Digital Engagement Admin portal. It will explore the different tabs within the portal and give hints and tips to a successful set up. Demonstrations and activities are throughout the session.

Objectives

By the end of the session, attendees will be able to:

- Interpret the customer journey.
- Discuss with others the different types of users and how this works in your organisation.
- Recognise the steps to add and delete new users to your platform.
- Gain an insight into the different tabs, links and videos to help your knowledge and understanding grow.
- Explore the basics of the engagement process.
- Examine the different types of canned responses.
- Identify the different areas within User Settings.
- Gain insights on how to run various reports to track their organisational KPI's.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2 hours

Group Size per Session

- 1 to 8 attendees

[admin_digital_engagement_system_training.pdf]

Advanced Administration Call Flow Tool

Engineers will work with our experienced trainer to build and analyse a testing sandbox, enabling them to test and develop their skills without affecting your platform.

Target Audience

Advanced administrators, engineers, and those that program and manage the platform.

Overview

This course equips engineers and advanced administrators with the skills they need to build successful call flow maps using Puzzel's Call Flow Tool. Participants will learn how to build and edit basic maps, as well as analyse advanced Interactive Voice Response (IVR) systems. This training includes a blend of comprehension, analytical study, and hands-on experience.

Objectives

By the end of the session, attendees will be able to:

- Demonstrate comprehension of the Call Flow Tool (CFT).
- Identify all the CFT module types and what they are used for.
- Build a basic IVR map using standard and advanced modules.
- Analyse an advanced CFT IVR.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 1 day

Group Size per Session

- 1 to 8 attendees

adv_admin_call_flow_tool.pdf

Advanced Administration Digital Engagement System Training

Administrators will explore the DE Admin portal and acquire advice and ideas to achieve and maintain a great team set-up for your organisation.

Target Audience

Engineers and Administrators.

Overview

This course provides you with the practical knowledge and skills you need to confidentially navigate around the Digital Engagement Admin portal. It will explore the different tabs within the portal and give hints and tips to a successful set up to those with full admin access and administration rights to the Digital Engagement Admin Platform. This will cover areas such as creating or updating banners, designing templates, creating opportunities and saving changes to the platform and publishing them to your customers.

Objectives

By the end of the session, attendees will be able to:

- Interpret the customer journey.
- Understand how to modify operating hours.
- Modify a signature or welcome message.
- Adding Groups/Skills.
- Setting Up a new “user” recap.
- Building Templates.
- Making a new banner or amending an existing one.
- Creating a new opportunity in a group.
- Saving and publishing your configuration recap.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2 hours

Group Size per Session

- 1 to 8 attendees

adv_admin_digital_engagement_system_training.pdf

Puzzel Smart Bot Digital Engagement Training

Engineers will delve deep into building and maintaining a Smart Chatbot. They will explore the steps to create Chatbot work flows, testing as they go, analysing key words and phrases, creating ideas to achieve successful outcomes and workflows to maintain a great set-up for your organisation.

Target Audience

Engineers and Developers. PLEASE NOTE: This session is solely aimed at those who are building and maintaining the Bot on an ongoing basis.

Overview

This course provides you with the practical knowledge and skills you need to confidentially build and maintain a Smart Chatbot. Through an ongoing scenario the learners will grow their skills as they navigate through the steps to create a successful Chatbot, fault finding as they progress. There will be an initial workshop where they will work as a team to explore the steps to success and to implement them, followed by a 1.5 days of training to give you the practical skills on how the Smart Chatbot could be adapted or improved. Demonstrations and activities are throughout the 2 day session

Objectives

By the end of the session, attendees will be able to:

- Navigate the Digital Engagement platform.
- Have a basic understanding of NLU.
- Know how to create new intents in the Chatbot.
- Explore and then practice how to build a workflow.
- Clarify how a workflow links to an Intent.
- Discuss the importance of different response choices within the Smart Chatbot.
- Test different responses within their Chatbot by using the “Test Intents” feature.
- Experiment with the “Pre go-live” feature.
- Summarize on how to save and publish their configuration on their Smart Chatbot.
- Diagnose how to troubleshoot their solution.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- 2 hours

Group Size per Session

- 1 to 4 attendees

smart_chatbot_digital_engagement_training.pdf

Train the Trainer Training

Staff will learn how to successfully deliver training to other employees, with advice on listening, organisation, praise, delivery and feedback.

Target Audience

Trainers and key staff training and mentoring staff day to day.

Overview

> Note
>
> This course can be tailored to cover either Puzzel Contact Centre or Puzzel Case Management.

This course will equip staff with the skills and knowledge they need to become clear and effective trainers. Participants will receive comprehensive training in Puzzel's Agent Application and learn how to use our supplied materials and resources to train other staff.

Objectives

By the end of the session, attendees will be able to:

- Demonstrate and practice how to deliver Agent Application Training.
- Demonstrate how to log in and log out of different profiles.
- Identify different tabs and build a dashboard with relevant tabs.
- Understand and use supplied materials and resources.
- Demonstrate how to answer and forward calls.
- Practice how to receive and respond to written requests.

Delivery Options

- Face to Face
- Blended Approach

Session Duration

- Three 2-hour sessions

Group Size per Session

- 1 to 8 attendees

train_the_trainer.pdf

