Welcome to CRC FASWS

Overview

Welcome to Stericycle and the Canadian Red Cross First Aid, Swimming, and Water Safety! As a customer experience agent, you are the voice of the Red Cross to the client. Your role is to answer questions about courses, help clients navigate the website, and troubleshoot customer issues. This lesson provides an overview of the training you'll receive to be successful in your role.

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Instructor Preparation

This section includes the materials, resources, and activity instructions necessary for teaching this lesson.

Delivery Time

1 hours 30 minutes

Materials, Supplies, and Equipment Checklist

- Agent credentials
- Flip chart and markers or white board and dry erase markers
- Participant Guide
- Participant handouts
- Instructor Guide
- Instruction slide deck
- *Mentor Assignment List*

Resources

- Pen or pencil

Resources for This Lesson

- Pen or pencil

Delivery Instructions

Topic	Content
Overview	Provide an overview of the content of this lesson. Go over the Roadmap with the class. Establish class rules and expectations. Emphasize the 'big picture' and how the lessons will provide a basic understanding of the agent role. Say something such as "During your training, you will learn how to navigate the Canadian Red Cross websites and use a variety of tools and databases to assist the customers."
My Credentials	Provide with their temporary credentials. On first login these credentials must be changed. The passwords for each login should not be written down due to **Payment Card Industry** (PCI) compliance.
My Mentor	Explain the mentoring program. Have the participants write the name of their mentor in the space provided.
Objectives	Review the objectives with the participants.

Overview

Your trainer will give you an overview of the training you'll receive. A lot of this may not make sense yet, but it will be second nature to you soon.

My Credentials

Your trainer will give you credentials you'll need to access systems. The first time you log in you'll be asked to change your password. Remember it! You can't write it down due to regulations. Keep your information private!

My Mentor

You're not going to be alone! After today's lesson you'll meet your mentor. Your mentor is an experienced agent who has lots of on-the-job experience and wants to help prepare you to take calls. You'll spend the next few days observing how they handle different scenarios. You'll have a chance to listen in on support calls and ask lots of questions. Take this guide with you to take notes.

My mentor is: _____

Objectives

After completing this lesson, you will be able to:

- summarize the FASWS program.

- summarize your role as a FASWS customer experience agent.

- describe the types of clients that contact this centre.

- classify calls by Call Driver.

Delivery Instructions

Topic	Content
Welcome to CRC!	Welcome the participants to this account.
	Tell them that we encourage them to explore the Canadian Red Cross website in more detail. There is interesting information at www.redcross.ca/about-us
Activity: **What's My Name?**	This is a quick, fun way of getting to know your participants.
	Go around the group asking everyone to put an adjective before their name. You might hear your participants call themselves Mysterious Mike, Brilliant Brenda, and Jovial Jennifer. Write them down and try to commit them to memory.
What is FASWS?	Show the landing page for FASWS at http://www.redcross.ca/training-and-certification Encourage the participants to become familiar with the site. Knowing where information is located will help them guide the caller to the correct area of the site.
Training Topics	Display the **Course Descriptions** page at www.redcross.ca/training-and-certification/course-descriptions. Guide the participants through each of the five program categories (First Aid at Home, Psychological First Aid, Workplace First Aid, Swimming & Water Safety, and Respect Education).
Training Partners	Have the participants brainstorm and give examples of Training Partners. Ask if a library could be a training partner? A hospital? A private business?
	Touch on Elite accounts. Tell participants that Elite accounts use a special phone number that puts them at the top of the queue. These accounts are handled only by highly qualified agents.
Who Takes CRC Training?	Ask if anyone has taken a Canadian Red Cross course. Who was in the course?

Welcome to CRC

The **Canadian Red Cross** (CRC) is the leading humanitarian organization through which people voluntarily demonstrate their caring for others in need.

Today, CRC provides relief not only to victims of armed conflict, but also to those of natural and man-made disasters, and other human tragedies through medical aid, material relief, and emergency social services.

You can learn more about CRC and its history at www.redcross.ca/about-us

What is FASWS?

For more than 60 years, CRC has been a leader in injury prevention programs. The training and certification program is called **First Aid, Swimming, and Water Safety** (FASWS). Every year more than 1.5 million Canadians are trained in CRC programs.

Training Topics

CRC offers a wide variety of courses that meet the needs of the public, workplaces, schools, and organizations. Topics covered include First Aid at Home, Psychological First Aid, Workplace First Aid, Swimming & Water Safety, and Respect Education.

Training Partners

CRC **Training Partners** (TPs) can be a business, community or municipal group, corporation, or other organization that have an agreement with the CRC to deliver training in their community or to their employees.

Elite Accounts

Elite is a category of high-profile TPs. These special accounts use a designated 800 number that takes precedence over any other call coming into CRC FASWS. Only agents who have achieved the highest level on their team are qualified to handle Elite accounts.

Who Takes CRC FASWS Training?

All kinds of people take training: people who want to be a Canadian Red Cross instructor, or instructors who want to keep their skills up to date through recertification take courses. So do healthcare providers, lifeguards, babysitters, and many others.

Delivery Instructions

Topic	Content
Your Role	Talk with the participants about the importance their role is for CRC. Stress that they should learn as much about the FASWS program as possible.
	Remind them that they need to be professional and use the skills they have.
	If there is time, guide a discussion about customer service calls they have experienced. Some conversation starters: What made the call memorable? How did they feel at the end of the call? What could the agent have done better?
First Contact Resolution	This area should reflect the quality initiative, agent expectations, and requirements Stericycle and CRC require.
Call Listening Activity: **Hello!**	This call listening activity is designed to give the participants an idea of what the calls are like. Access the audio files from the **Training Drive → FASWS New Hire Agent → Welcome to CRC → Hello** folder.
	Encourage the participants to take notes while they listen.
	After each recording, discuss the call with them. Elicit the reason for the call and the type of caller. Ask for ideas on what steps the agent took. Was first contact resolution met?
	Call One: Hello_01.mp3
	1. Who called? *Jamie Kelley, jamiekelley08@hotmail.com*
	2. What type of caller is he? *A participant. (I signed up for a course)*
	3. What was the issue? *There was not an invitation link to set up his account. (The email was missing an 'a' in Hotmail.*
	4. What steps did the agent take? *She found his account, corrected the email address and sent a new invitation to the course.*
	5. Was the issue resolved? *Yes, it was.*
	6. Was first contact resolution met? *Yes, it was.*

Your Role

As a Stericycle agent, you're representing CRC. In fact, you may provide the only interaction some clients will ever have with the Red Cross. Your professionalism, willingness to help, and knowledge of FASWS is key to providing an excellent customer experience to CRC's clients.

In this training program, you'll use the skills you already have: skills like active listening, showing empathy, and proper etiquette to do your job. And you'll learn about the resources and tools that will answer most of the clients' questions.

You'll answer client questions about courses. Often, you'll use your tools and resources to answer these questions. You'll also help clients access and navigate the CRC websites, update their user profile. Sometimes, you'll help the client by getting them to a specialist who can provide more detailed help.

By the end of this training, you'll be familiar with the program and feel confident that you'll exceed in your new role as customer experience agent. Let's get started!

First Contact Resolution

First contact resolution is the goal of every call, whether that means you're able to resolve the client's issue or whether you get them to another agent who can.

Call Listening Activity: Hello!

Your trainer is going to play a recording that represents the types of issues our agents encounter every day. As you listen, take notes about the call. Some things to listen for: Who called? What is the issue? What steps did the agent take? Was the issue resolved?

Delivery Instructions

Topic	Content
Types of Callers	Agents must know the type of caller to troubleshoot the caller's problem. The complexity of the call usually corresponds to the amount of access the caller has to the different CRC sites.
	Mention that they will also support clients through email. They will learn more about email support later in their training.
	Point out that in this training the **client** refers to someone who is contacting this centre by phone or email about FASWS. A **caller** is a client who contacting this centre by phone.
Types of Calls	Encourage critical thinking during a discussion. Ask them what kind of calls they expect to handle.
Call Drivers	Explain how each interaction is categorized at the end of call. This information is requested by the CRC and helps Stericycle identify call trends.
	Stress that calls can often fall under more than one category. They should ask their Team Lead if they have any question about what call driver to assign to the call.

Types of Callers

1 877 356-3226 is the number clients call for help. Help is in both English and French Monday through Friday from 8:30 a.m. to 7:00 p.m. EST.

> **Note:** Clients may also make contact through email. Responding to client emails will be covered later.

So, who calls this number? Callers can be:

- A **participant** is a community member who is currently taking, looking to take, or has taken a CRC course.

- An **instructor** is certified by CRC to lead a course, usually through a training partner.

- A **training partner representative** is authorized to act on behalf of a training partner.

Most callers will tell you if they are a training partner or an instructor. If they don't say, you can most likely understand from what the caller tells you.

Each type of caller has unique access to CRC websites. For example, after logging in, a training partner representative can access the courses scheduled for their location, while an instructor can see all rosters for courses she is scheduled to lead. A participant can only see the course he is taking and certificates he has earned.

> **Note:** It's possible for callers to be of more than one type. For example, an instructor could also be a participant in a course.

Types of Calls

The first step in helping a client is understanding why they have called. Often participants have issues that are different from problems an instructor or training partner may have. With experience you'll become familiar with common calls and the process for helping the caller.

Call Drivers

A call driver is simply the category that the call belongs to. At the end of the call process you'll have to assign the call to a call driver. The call driver list appears from a drop-down menu.

See the *Call Driver Types* list on the next page.

Delivery Instructions

Topic	Content
Call Driver Types	Go over the list of drivers and definitions.
	Mention the transition that occurred when the data was moved to the new system. Physical cards were issued before October 2017. If the customer is contacting about a missing certificate issued before October 2017, chances are the information did not transfer to the new system

Call Driver Types

Table 1: Call Driver Types

Driver	Definition
Replacement Card	Use when the caller took a course before the system transition, lost their physical card, and needs a replacement created in the system.
Search for Course	Use when the caller can't find a course and the agent used myrc.redcross.ca to locate the course for the client.
Basic Questions from TP	Use when a TP asks any questions.
Certificate Not in Profile	When the certificate is not in the CRM.
Program Questions	The caller asks questions that can be answered by a Tier 1 agent using the website or program standards.
Course Management	Use when a caller needs assistance adding a participant to a course, creating a course session, adjusting component status, etc.
Profile Update	Use when a caller wants assistance updating personal information (mailing address, phone number, email, etc.).
Transfer to PCI Site	Use when a customer experience agent transfers the call to a sales agent for the caller to place an order, check the status of an order, etc.
Escalation	Use when a case needs to be created.
Spelling Mistakes	Use when the caller received their certificate with a spelling mistake and needs an updated copy with the correct spelling.
Customer Complaints	Use when the caller has complaints about a course, the website, or the Canadian Red Cross.
Placing Order	Customer experience agent uses this when the caller's original reason for the call is to place an order for materials.
Order Status	Sales agent uses this when the caller is following up on the status of an order.
Access Issue	Use when the customer has difficulties accessing their My Red Cross profile or their online course.
Overdue Balances	Customer experience agent uses this when the caller makes a payment on their account or for past orders.
Product Return	Customer experience agent uses this when the caller wants to return unused or incorrect product.

Delivery Instructions

Topic	Content
Call Listening Activity: **What's the Driver?**	This call listening activity is designed to give the participants an idea of caller types and the reason for the call. Access the audio files from the **Training Drive → FASWS New Hire Agent → Welcome to CRC → Who's the Caller** folder. Encourage the participants to take notes while they listen. After each recording, elicit from them what type of caller was on the line. Ask for the reason for the call. Have them refer to *Table 1: Call Driver Types* to decide which call driver they would assign to each call. Explain that some calls can could be more than one driver. In these cases, they should ask their mentor or Team Lead for guidance. **Call One: RC_01.mp3** **Driver:** Replacement Card **Call One: PQ_02.mp3** **Driver:** Program Question **Call One: SC_03.mp3** **Driver:** Search for Course

Call Listening Activity: What's the Driver?

You're going to listen to some call recordings. As you listen, take notes about the call. Some things to listen for: Who called? What is the reason for the call? What is the call driver for the call?

Refer to *Table 1: Call Driver Types* on the previous page. Use the space below to take notes as you listen.