

**ATVendor**

Technical Support Training

Instructor Guide

## **Introduction**

This instructor guide contains two modules, encompassing 5 lessons. The lessons will present scripts that learners can follow to gather personal and system information from the customer, as well as information regarding the problems being encountered and the applications causing those problems. The lessons will demonstrate the use of professional phone etiquette and allow the learner to participate in several mock phone calls to develop mastery. With the knowledge gained through these modules, the learner will then be capable of determining the proper sequence for troubleshooting the problem or deciding if the problem needs to be sent to higher level technical support personnel.

This lesson will be delivered in several different formats. Initially, the learners will be given the student guide, which will direct them through much of the training. The learners will also be engaged in discussions and provided demonstrations of the various errors that may be encountered. Subsequently, the learners will utilize a computer to practice the steps from the perspective of the customers. Then they will have the opportunity to interact with an actor over the phone.

While each lesson is designed to last only about 10 or fifteen minutes, the actual amount of time will vary depending on the learners' abilities, the number of learners that are able to take the training at any given time, and the number of questions presented by the learners. The employer's cost will be minimal, while the instruction should present no cost at all to the student. The employer has indicated that most resources can be pulled from other areas of the company. Computers will be provided from other departments and an employee will function as the actor. Other resources will include a demonstration version of the ZoomText application, which can be downloaded free from the AI squared web site, and photocopying costs, which are estimated at approximately \$30 for the instructor and student manuals. These short, inexpensive lessons should provide substantial payoff in customer satisfaction.

## Module 1: Overview

**Lesson Title:** Gathering information from the customer over the phone

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To collect the appropriate personal contact information and computer system details from the customer

**Terminal Objective:** The learner will begin to think about what makes a positive technical support experience for the customer and will be able to list three positive and three negative characteristics common in phone- based technical support

**Desired Learning Outcomes:**

- The learner will list three proper and three improper procedures in the three sample phone calls provided.
- The learner will list three pieces of information they have had to ask for when helping family members.
- The learner will list three pieces of information that a technical support technician asked for when the learner placed the call.

**Purpose of lesson:** The lesson is designed to provide learners with an opportunity to draw on their own experiences with troubleshooting and connect these experiences with the process that they will be required to use when gathering information from the customer.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson will prompt the learners to think about the importance of professional etiquette and attentive listening in technical support by providing examples and encouraging the learners to reflect on their previous experiences with troubleshooting.

## Module 1: Overview

| Event                      | Instructor Activity                                                                                                                                                                                                                                                                                                                                          | Student Activity                                                                             |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Focus on goals             | NOTE: Play three recordings of real technical support calls illustrating both proper and improper procedures. Have the students discuss what made the calls good or bad and what could be done to improve the calls. For example, could they have been more polite, listened more attentively, or been more specific in their questioning.                   | Students discuss what made the calls good or bad and what could be done to improve the calls |
| Connect to prior knowledge | SAY: Let's discuss a time when you were helping a friend or family member try to resolve a problem with their computer. What kind of information did they provide you and what did you have to ask them before you could help them? What about the times you have called for technical support? What are some of the things that are typically asked of you? | Listen, ask questions and respond to questions.                                              |

## Module 1: Lesson 1

**Lesson Title:** Gathering customer data using a system ID

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** Learner will use the customer ID to locate the appropriate information in the system.

**Terminal Objective:** Given a phone call from a customer, the learner will determine if the customer has an ATVendor ID. If the customer has an ATVendor ID, the learner will locate the customer file and verify that the information is correct.

**Desired Learning Outcomes:**

- Given a phone call from customer, the learner can determine if the customer has ATVendorID 95% of the time.
- Given a mock phone call with the customer reporting the VendorID, the learner has the customer get the ID 95% of the time.
- Given a mock phone call with a customer reporting the VendorID, the learner will use the correct wording to have the customer locate the ATVendor ID 95% of the time.
- Given an ATVendor ID, the learner will find the customer file in the system
- Given an ATVendor ID, the learner will find the customer name, phone and address in the customer's file 95% of the time.
- Given customer information from their file, the learner will determine if this information is correct.
- Given a customer's file, the learner will put the information in the correct place in the script.
- The learner will use the appropriate professional etiquette.

**Purpose of lesson:** This lesson is designed for technicians to access customer information as quickly as possible, without having to ask the customer to provide personal information unless absolutely necessary.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** The lesson will explain the use and location of the ATVendor system ID, then demonstrate how to find the customer's file on the system based on this ID. The learner will practice by participating in a mock phone call.

## Module 1: Lesson 1

| Sequence     | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Student Activity                                                                                 |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Introduction | SAY: Following are some very specific scripts to guide you in getting information about the customer and the computer they are using, provided that the customer is able to find their ATV vendor ID.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Listen, ask questions and respond to questions.                                                  |
| Body         | <p>SAY: All computers shipped from ATV vendor have an ID associated with them. Using this ID is the easiest way to get comprehensive information about customer and the computer. Attempt to have the customer provide you with this ID before trying other means. After getting the ID, verify that you have found the correct file and that the information is current. Ask: What are the two places where the ID can be found?</p> <p>These are the steps. The student manual will tell you just what to say:</p> <ol style="list-style-type: none"><li>1. Have the customer provide the ID.</li><li>2. Get all the customer and system information based on this ID.</li><li>3. Verify that this information is correct.</li></ol> <p>Demonstrate to the learner where the PDF files are located on the company's network and, within the file, where the name, phone number, operating system, display adapter, and pre-installed software are located.</p> | Listen, ask questions and respond to questions.                                                  |
| Conclusion   | SAY: On the computers that are set up, take the student guide and find the files for these customer ID's [Provide the learners with three customer ID's]. After you've found all the files, let me know and I will have an actor give you a call on the phone. An actor role-playing a client with a problem as outlined in the instructor's manual will call on the phone. The actor will call twice, once with and once without a customer ID. The actor will respond to the learner's questions by providing the information requested.                                                                                                                                                                                                                                                                                                                                                                                                                       | The student follows the script outlined in the student manual while on the phone with the actor. |

## Module 1: Lesson 2

**Lesson Title:** Eliciting contact and system information from the customer

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To instruct technicians in how to use professional phone etiquette to gather contact and system information from a customer when appropriate.

**Terminal Objective:** Given a mock phone call from a customer without an ATVendor ID, the learner will determine that the customer does not have an ID and will gather the appropriate information.

**Desired Learning Outcomes:**

- Given a customer, the learner will determine that the customer does not have an ID and will get the appropriate information. (without an ID?) or (the learner will determine whether or not the customer has an ID)
- Given a mock phone call from a customer without an ATVendor ID, the learner will interact with the customer in accordance with the script.
- Given a mock phone call from a customer without an ATVendor ID, the learner will collect the appropriate information from the customer.
- Given a mock phone call from a customer without an ATVendor ID, the learner will determine if they need to direct the customer to get more information about his or her display adapter.
- The learner will use the appropriate professional etiquette.

**Purpose of lesson:** This lesson is designed to direct learners to appropriately request personal and system information from the customer when the customer file cannot provide that information.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** The lesson will explain why it is necessary to gather specific information from the customer. This information includes the customer's name, phone number, e-mail address, operating system, and display adapter. The learner will practice gathering this information by participating in a mock phone call.

## Module 1: Lesson 2

| Event        | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Student Activity                                                                                                                            |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction | SAY: If the customer is unable to locate their ID and cannot provide enough information so that you can locate their file, you will need to get basic contact information and verify that is correct.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Listen, ask questions and respond to questions.                                                                                             |
| Body         | <p>SAY: Why do you need to get a customer's contact information? By gathering basic contact information, ATVendor is able to keep a record of who is calling and how often. It helps ATVendor to determine if specific systems are experiencing an unusual number of problems that may be indicative of issues with the configuration. It also allows ATVendor to follow up on calls to determine customer satisfaction. This information is necessary if the call is passed on to a higher level technical support or if the call has to be returned. Below is specific wording that will help you to make sure that you have all the information you will need. Follow these steps to get contact information. The student manual will tell you just what to say.</p> <ol style="list-style-type: none"><li>1. Ask the customer for his or her name.</li><li>2. Ask the customer for his or her phone number.</li><li>3. Ask the customer for his or her e-mail address.</li><li>4. Ask the customer for the operating system, or walk the customer through getting this information.</li><li>5. Ask the customer for the display adaptor. If they cannot give you this information, follow the steps in task 5.</li></ol> | Listen, ask questions and respond to questions.                                                                                             |
| Conclusion   | SAY: On the computer provided, determine the operating system using the method outlined above. Then the actor will continue a call with you. Follow the scripts above, making sure to get the customer's name, phone number, e-mail address, operating system, and display adapter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Student goes through the steps in the manual to determine the operating system on the customer's PC, They then participate in a phone call. |

## Module 1: Lesson 3

**Lesson Title:** Eliciting the brand and model of the display adapter from the customer

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To instruct technicians in how to use professional phone etiquette to gather display adapter information from a customer in the most efficient manner possible and to indicate why it is important to gather that information.

**Terminal Objective:** Given a mock phone call with a customer who does not have an ATVendor ID and is not able to locate the brand and model of their display adapter, the learner will walk the customer through the appropriate steps so that the customer can provide that information.

**Desired Learning Outcomes:**

- Given a mock phone call with a customer who does not have an ATVendor ID and is not able to locate the brand and model of their display adapter, the learner will be able to walk the customer through the appropriate steps by following the script provided.
- The learner will use the appropriate professional etiquette.

**Purpose of lesson:** This lesson is designed to direct learners to appropriately request display adapter information from the customer when the customer's file cannot provide that information.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson will explain why it is important to gather information about the display adapter as well as the proper steps to get this information as efficiently as possible. The learner will practice gathering this information by participating in a mock phone call.

## Module 1: Lesson 3

| Event        | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Student Activity                                                                                                                                                   |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction | SAY: You were asked previously to have the customer provide the brand and model of the display adapter. Many customers will be unable to provide this information. Let's determine what you can do to acquire it.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Listen, ask questions and respond to questions.                                                                                                                    |
| Body         | <p>SAY: Adaptive technologies, such as screen readers and magnifiers locate the display driver, get the information needed for it, then pass the sometimes modified Display Driver Interface (DDI) calls to the original display driver (see Microsoft Article). These technologies may be compatible with some adapters, but not others. It is therefore important to gather information about the display adapter.</p> <ol style="list-style-type: none"><li>1. Have the customer go to the control panel.</li><li>2. Have the customer open the display properties window.</li><li>3. Have the customer select the adapter tab.</li><li>4. Have the customer read the name and model of the video adapter.</li></ol> | Listen, ask questions and respond to questions.                                                                                                                    |
| Conclusion   | SAY: With one of the computers provided, follow the steps in the users' guide to determine the display adapter brand and model and to become familiar with what the customer will be experiencing when following these steps. You will continue the mock phone call with the actor. As part of this phone call, you will be required to gather information from the customer and determine if you need to walk the actor through finding information about the display adapter.                                                                                                                                                                                                                                         | Student goes through the steps in the manual to determine the display adapter on a PC from the perspective of the customer. They then participate in a phone call. |

## **Module 1: Assessment and Conclusion**

**Lesson Title:** Evaluation and conclusion to gathering information from the customer over the phone

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To test what the student has learned in this module, making sure they are able to use professional etiquette, follow the script, and decide when they have enough information or when they need to gather more

**Terminal Objective:** Student will demonstrate proficiency in gathering information from the customer

**Desired Learning Outcomes:**

- The student will demonstrate the use of professional etiquette.
- The student will follow the script.
- \* The student will decide when they have enough information and when they have to gather more.

**Purpose of lesson:** The purpose of the lesson is to evaluate student performance and discuss ways to improve that performance, including the speed with which they do their job

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson is an evaluation of student performance. It will involve the actor making a phone call to the learner to simulate a conversation with a real customer. Over several conversations, the learner will have the opportunity to practice following the various aspects of the script, the use of which will vary depending on the circumstances of the call. The lesson will then focus on ways to improve his performance and access customer information more quickly.

## Module 1: Assessment and Conclusion

| Event                   | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Student Activity                                                                                  |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| Synthesize and Evaluate | SAY: Now we will ensure that you are able to go through all the steps in sequence. An actor will call you on the phone. Please follow the steps in the student manual and make sure that either you get the ATV vendor ID from the customer and find the information in their file or that you request the necessary information from the customer. Your success will depend on how politely and professionally you deliver the content, whether you gather all the required information, whether you gather this information by the most efficient means possible, and whether or not you are able to verify that the information is correct. | Student participates in several phone calls, using the student guide to determine how to respond. |
| Extend and transfer     | NOTE: Discuss other information that may be of value and any techniques the technicians have for quickly accessing the customer's file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                   |

## Module 1: Assessment

Learners will record information from the call on the following form.

### AT Vendor Call Record (Student answer Sheet for Module 1)

Customer number (ATVendor ID): \_\_\_\_\_

Customer name: \_\_\_\_\_

Phone number: \_\_\_\_\_

Brand of computer: \_\_\_\_\_

Operating system: \_\_\_\_\_

Display adapter: \_\_\_\_\_

Pre-installed software: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Module 1: Assessment - Part 1

Based on the following customer information:

|                                                                                                         |                                                            |                                   |
|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------|-----------------------------------|
| Created By: <u>DM</u>                                                                                   | ATVendor                                                   | Page: <u>1</u> of: <u>7</u>       |
| Scanned By: _____ Desktop Configuration Sheet                                                           |                                                            |                                   |
| Date: <u>Sept 19/05</u>                                                                                 | Client: <u>John Doe</u>                                    | System #: <u>142478</u>           |
| Contact: <u>Jane Doe</u>                                                                                | Phone: <u>416-555-4556</u>                                 |                                   |
| Retail Model #: <u>Touch</u>                                                                            | Serial #: <u>TS012</u>                                     |                                   |
| Motherboard Model #: <u>Asus P4P800 SE</u>                                                              |                                                            |                                   |
| CPU: <u>Intel P4 3.06GHz</u>                                                                            | BIOS Ver: <u>80009 - 4/30/2005</u>                         | IP Address: <u>DHCP</u>           |
| O/S: <u>WinXP Home</u>                                                                                  | Computer Name: <u>JohnD-142478</u>                         | Wkgrp/Domain: <u>MSHOME</u>       |
| NIC1 Driver: <u>Marvell 7.29.4.3-11/26/2004</u>                                                         | NIC2 Driver: _____                                         |                                   |
| Video Driver: <u>Nvidia 77.77</u>                                                                       | Audio Model: <u>Creative SB Audigy 2</u>                   |                                   |
| Mouse: <u>intellimouse</u>                                                                              | Port: <u>PS2</u>                                           | S/N: <u>3720238271</u>            |
| Keyboard: <u>INTERNET</u>                                                                               | Port: <u>PS2</u>                                           | S/N: <u>677004813</u>             |
| Memory: Total: <u>1024MB</u>                                                                            | Type: <u>2K 512MB PC3200</u>                               | Avail. Slots: <u>2</u>            |
| FDD A: <u>3 1/2 Floppy</u>                                                                              | Prim IDE Master: _____                                     | Sec IDE Master: <u>LG CD RW</u>   |
| FDD B: _____                                                                                            | Prim IDE Slave: _____                                      | Sec IDE Slave: <u>DVD rom</u>     |
| RAID: _____                                                                                             | SATA 1: <u>160GB</u>                                       | SATA 2: _____                     |
| Slot 0: Style: <u>AGP</u>                                                                               | Description: <u>Asus 9520-nvidia Geforce FX 5200 128mb</u> |                                   |
| Slot 1: Style: <u>PCI</u>                                                                               | Description: _____                                         |                                   |
| Slot 2: Style: <u>PCI</u>                                                                               | Description: <u>us robotics 56k DATA/FAX 2973 modem</u>    |                                   |
| Slot 3: Style: <u>PCI</u>                                                                               | Description: _____                                         |                                   |
| Slot 4: Style: <u>PCI</u>                                                                               | Description: <u>CREATIVE SB AUDIGY 2 VALUE</u>             |                                   |
| Slot 5: Style: <u>PCI</u>                                                                               | Description: _____                                         |                                   |
| Slot 6: Style: _____                                                                                    | Description: _____                                         |                                   |
| Slot 7: Style: _____                                                                                    | Description: _____                                         |                                   |
| Bays (Total/Available): Int 3.5: <u>2/1</u> Ext 3.5: <u>1/0</u> Ext 5.25: <u>4/2</u> Int 5.25: <u>0</u> |                                                            |                                   |
| Windows <u>XP Home</u>                                                                                  | CD Key: <u>KXJY - 7QVR - HQMG - C89TP - GKXP</u>           |                                   |
| <u>offia 2003 sft</u>                                                                                   | CD Key: <u>KWJC - KYB2 - RCPQ - X2HBY - 7DA2</u>           |                                   |
| <u>dragon ns Prof 8</u>                                                                                 | CD Key: <u>A109 - 489 - J32 - 7HPD - 9</u>                 |                                   |
| <u>text help r &amp; w 7.1</u>                                                                          | CD Key: <u>2354</u>                                        |                                   |
| <u>NOCTON sys works</u>                                                                                 | CD Key: <u>BCQ - 9BG - XK4P - GTX - XLP - JQV</u>          |                                   |
| CD Key: _____                                                                                           |                                                            |                                   |
| Monitor: <u>Viewsonic 570f 17"</u>                                                                      | Serial #: <u>6E04250333</u>                                |                                   |
| Printer: <u>hp deskjet 6540 photo</u>                                                                   | Port: <u>USB</u>                                           | Serial #: <u>Y4AC3P2KM</u>        |
| Other: <u>data by alphasmart</u>                                                                        | Port: <u>USB</u>                                           | Serial #: <u>data-ab-0405-874</u> |
| Mouse Pad: <u>Red</u>                                                                                   | Power Bar: <u>Blue Diamond</u>                             | Speakers: <u>Altec Lansing</u>    |
| Paper: _____                                                                                            |                                                            |                                   |
| Notes: _____                                                                                            |                                                            |                                   |

## Module 1: Assessment - Part 1 (Customer provides ID)

In this assessment, the actor provides a customer ID, which should allow the learner to locate the client's file in the system and get from that file the customer's name, phone number, operating system, display adapter, and pre-installed software. The learner will be assessed on how well they follow the script, if information is recorded accurately on the Call Record form, whether or not they ask unnecessary questions, and how professionally they handle the call.

**Assesses whether learner follows the script appropriately:**

|   | Actor's Script                          | Learner's Script                                                                                                                      | Learner had correct response according to the script (2 points apiece – 4 points possible) |
|---|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| 1 | I am having a problem with my computer. | Would you please read the ATVendor ID. It is located on the Start Menu as well on the side of the computer.                           | <input type="checkbox"/>                                                                   |
| 2 | My ID is 142478                         | Learner locates the file in the system. Based on the file, he says:<br><br>I have your phone number as 416-555-4556; is this correct? | <input type="checkbox"/>                                                                   |
| 3 | Yes, that is correct.                   |                                                                                                                                       |                                                                                            |

**Assess listening skills and information collection – as indicated on the call record form: (12 points possible)**

1. Learner was able to locate the correct customer file based on the ID? (2 points)
  - a. YES
  - b. NO
2. Learner was able to locate and record the customer's name as John Doe? (2 points)
  - a. YES
  - b. NO
3. Learner was able to locate and record the phone number as 416-555-4556? (2 points)
  - a. YES
  - b. NO
4. Learner was able to locate and record the operating system type as Win XP Home? (2 points)
  - a. YES
  - b. NO
5. Learner was able to locate and record the display adapter type as ASUS 9520 NVIDIA GeForce FX5200 128MB? (2 points)
  - a. YES
  - b. NO
6. Learner was able to locate and record the pre-installed software as XP Home, Office 2003, Dragon NS Pref. 8, TextHelp R&W 7.1, and Norton System Works? (2 points)
  - a. YES
  - b. NO

**Overall quality (4 points possible):**

4. Learner asked \_\_\_\_\_ unnecessary questions?  
Item Score = (unnecessary question count) times -2
3. Learner handled the call politely and professionally
  - a. All the time (4 points)
  - b. Most of the time (3 points)
  - c. Some of the time (2 points)
  - d. The learner did not follow the script (0 points)

**Total Score:** \_\_\_\_\_ / 20 = \_\_\_\_\_ %  
(Points)

## Module 1: Assessment - Part 2 (Customer does not provide ID)

In this assessment, the actor is NOT able to provide a customer ID, which forces the learner to gather information regarding the customer's name, phone number, operating system, display adapter, and pre-installed software. The learner will be assessed on how well they follow the script, if information is recorded accurately on the Call Record form, if they ask unnecessary questions, and how professionally they handle the call.

**Assesses whether learner follows the script appropriately:**

|   | Actor's Script                                 | Learner's Script                                                                                                                                                                                                                                                                                                                              | Learner had correct response according to the script<br>(2 points apiece – 16 points possible) |
|---|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 1 | I am having a problem with my computer.        | Would you please read the ATVendor ID. It is located on the Start Menu as well on the side of the computer.                                                                                                                                                                                                                                   | <input type="checkbox"/>                                                                       |
| 2 | I don't have an ID.                            | May I have your name?                                                                                                                                                                                                                                                                                                                         | <input type="checkbox"/>                                                                       |
| 3 | William Smith                                  | May I have your phone number?                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/>                                                                       |
| 4 | 478-543-2345                                   | What operating system are you using?                                                                                                                                                                                                                                                                                                          | <input type="checkbox"/>                                                                       |
| 5 | Microsoft Word                                 | That's actually a word processor. I'll walk you through the steps to find the operating system information. On the taskbar at the bottom of your screen, click Start, and then Run. In the Run dialog box, type: "winver". Click OK. A dialog box displays the operating system and version you are running. Please read me that information. | <input type="checkbox"/>                                                                       |
| 6 | Microsoft Windows, Version 5.1, Service Pack 2 | What is the brand of computer you are using?                                                                                                                                                                                                                                                                                                  | <input type="checkbox"/>                                                                       |
| 7 | DELL                                           | What is the brand and model of your display adapter?                                                                                                                                                                                                                                                                                          | <input type="checkbox"/>                                                                       |

|   | Actor's Script         | Learner's Script                                                                                                                                                                                                                                                                                                                                                                                                                   | Learner had correct response according to the script<br>(2 points apiece – 16 points possible) |
|---|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 8 | I don't know.          | In the Windows Start menu, select Control Panel. In the Control Panel window, double-click Display. In the Display Properties dialog box, select the Settings tab; then click the Advanced button. A new dialog will appear that contains your video adapter settings. In this dialog, select the Adapter tab. The name and model of your video adapter appears in the box labeled Adapter Type. Would you please read this to me. | <input type="checkbox"/>                                                                       |
| 9 | NVIDIA GeForce Go 6200 |                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                |

**Assess listening skills and information collection – as indicated on the call record form: (12 points possible)**

1. Learner did not spend extra time looking for a customer file. (2 points)
  - a. Did not look (correct answer)
  - b. Did look
2. Learner was able record the customer's name as William Smith? (2 points)
  - a. YES
  - b. NO
3. Learner was able to record the phone number as 478-543-2345? (2 points)
  - a. YES
  - b. NO
4. Learner was able to record the operating system type as Microsoft Windows, Version 5.1, Service Pack 2? (2 points)
  - a. YES
  - b. NO
5. Learner was able to record the computer type as DELL? (2 points)
  - a. YES
  - b. NO
6. Learner was able to record the display adapter type as NVIDIA GeForce Go 6200? (2 points)
  - a. YES
  - b. NO

**Overall quality (4 points possible):**

4. Learner asked \_\_\_\_\_ unnecessary questions?  
Item Score = (unnecessary question count) times -2
3. Learner handled the call politely and professionally
  - a. All the time (4 points)
  - b. Most of the time (3 points)
  - c. Some of the time (2 points)
  - d. The learner did not follow the script (0 points)

**Total Score:**            / 32 =            %  
(Points)

## Module 2: Overview

**Lesson Title:** Gathering information about the error

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To provide a conceptual framework for the lessons in this module as well as draw on previous experience to provide a context for the lesson.

**Terminal Objective:** The learner will be able to understand the goals for the lessons in this module and the activities that will take place during these lessons.

**Desired Learning Outcomes:**

- The learner will be able to explain that one goal of the lesson is to help them determine what problem is causing the error.
- The learner will be able to explain that one goal of the lesson is to help them determine whether they have enough information or if they need more.
- The learner will be able to explain that one goal of the lesson is to help them decide whether they can answer the question themselves or need to pass the call onto higher-level technical support.

**Purpose of lesson:** The lesson is designed to provide learners with an opportunity to draw on their own experiences with troubleshooting and connect these experiences with the process that they will be required to use when gathering information from the customer.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson will provide background on the goals of the following lessons: determining what program is causing the error through a combination of listening and asking questions and then deciding if the error is something that should be resolved by the learner. The lesson will also provide learners with an opportunity to reflect on their previous experiences with troubleshooting.

## Module 2: Overview

| Event                      | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                            | Student Activity                                                                                                                         |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Focus on goals             | SAY: Now that you have gathered the required information from the customer, we are ready to find out what program is generating the error. After this step, you will be able to determine if the error is something you should attempt to resolve or if it should be passed to the next level of technical support. The customer may initially provide you with enough information, or you may have to ask specific questions to get the information you need. | Listen, ask questions and respond to questions.                                                                                          |
| Connect to prior knowledge | SAY: Let's go back to the discussion we had previously about helping family members. Can someone provide an example of how you determined what program was causing the error?                                                                                                                                                                                                                                                                                  | The student will provide examples of the questions they had to ask or questions they would have to ask to get the necessary information. |

## Module 2: Lesson 1

**Lesson Title:** Listening for potential causes of error

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To instruct the learner in the types of content they need to listen for when speaking to a customer.

**Terminal Objective:** Given a phone call from a mock or real customer, the learner will listen for potential causes of error.

**Desired Learning Outcomes:**

- Given a phone call from a mock or real customer, the learner will listen for the program generating the error.
- Given a phone call from a mock or real customer and given that the customer provides information about the program generating the error, the learner will be able to indicate what program is generating the error.
- Given a phone call from a mock or real customer and given that the customer provides information about what happened when the error occurred, the learner will be able to indicate what was happening when the error occurred.
- Given a phone call from a mock or real customer and given that the customer provides information about what happened when the error occurred, the learner will be able to indicate phrases the customer used that indicated what was happening when the error occurred.
- Given a phone call from a mock or real customer and given that the customer provides information about the number of times the error occurred, the learner will be able to indicate generally how many times the error has occurred.
- Given a phone call from a mock or real customer and given that the customer gives statements about the number of times the error occurred, the learner will be able to classify those errors into groups indicating frequency.

**Purpose of lesson:** The lesson is designed to instruct students in the types of information they will need to listen for as the customer describes the problem. This will help promote good customer relations and save time and frustration generated when the customer is asked to repeat information.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson instructs the students in what things to listen for as the customer describes the problem: the program generating the error, the frequency of the error and the circumstances surrounding the error

## Module 2: Lesson 1

| Event        | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Student Activity                                                                                                                                                                                     |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction | SAY: In this step, the only thing you need to do is listen for the potential cause of the error. Gathering the necessary information through listening can save you a lot of time. It also prevents the customer from having to repeat information; they will therefore be less frustrated by the process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Listen, ask questions and respond to questions.                                                                                                                                                      |
| Body         | <p>NOTE: The instructor will use two examples of what a customer might say and elicit student reaction.</p> <p>SAY: Follow these steps:</p> <p>1. Listen for the program generating the error.<br/>The customer will often give some indication of the program that caused the error. Listen for any hint of what program they were using when the error occurred. The error may be related to one program or could be a conflict between two or more programs. If the customer does provide sufficient information about the program that is causing the error, proceed to Objective 6</p> <p>2. Listen for what happened when the error occurred.<br/>Errors may result consistently or may appear intermittently. Try to determine if the customer has witnessed a pattern, that is, have they noticed any link between what they are doing and what is causing the error. If the customer does not provide this information, get this information as part of Objective 6.</p> <p>3. Listens for how many time the error has occurred.<br/>It will be helpful to know if this is the first time the error has occurred, or if it has been ongoing and the customer has only now called for support. This will also give you some insight into the customer's attitude. If the problem has been ongoing, the customer may already be frustrated, and it will be important for you to focus on being positive and patient. If this customer does not provide this information, get this information as part of Objective 6.</p> | The student will indicate what application they feel is causing the problem. The learner will determine if this is an intermittent problem or is occurring every time a user takes a certain action. |
| Conclusion   | NOTE: The actor will call the learner, creating the scenario that he or she is having a problem with the computer. The actor will describe the error messages as outlined in the examples provided. Discuss with the student any information they were not able to get from the conversation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | The student will correctly determine what information has been provided and if there is any more information they require.                                                                           |

## Module 2: Lesson 2

**Lesson Title:** Determine the details surrounding the error

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To instruct the learner to follow use professional etiquette to gather information from the customer regarding the errors with an application.

**Terminal Objective:** Given a mock phone call with a customer reporting a computer error, the learner will discover the details surrounding the error.

**Desired Learning Outcomes:**

- Given a mock phone call with a customer reporting a computer error, the learner will follow the script using professional etiquette.
- Given a mock phone call with a customer reporting an error, the learner will walk the customer through the appropriate steps to get the name of the program that caused the error.
- Given a mock phone call with a customer reporting an error, the learner will walk the customer through the appropriate steps to get the name of the version of the program that caused the error.
- Given a mock phone call with a customer reporting an error, the learner will walk the customer through the appropriate steps to determine the context of the error.
- Given a mock phone call with a customer reporting an error, the learner will walk the customer through the appropriate steps to determine the error message.

**Purpose of lesson:** This lesson is designed to instruct the learner in the use of professional etiquette when working with a customer to determine the specifics of an error and to gain experience doing this.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson will have the learner use a script to gather error details, such as the name of the program generating the error, the version of the program, the context of the error, and the specific message received. The learner will then have an opportunity to follow a script to practice using professional etiquette to gather this information.

## Module 2: Lesson 2

| Event        | Instructor Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Student Activity                                                                                                                                                                                                                                                                                                                                                |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction | SAY: If the customer does not provide the necessary information initially, you will have to ask several questions to determine what application or combination of applications is responsible for the error.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Listen, ask questions and respond to questions.                                                                                                                                                                                                                                                                                                                 |
| Body         | <p>SAY: We will go over some questions you can ask to determine the cause of the problem, but you may need to ask more specific questions based on the responses from the customer. There are the questions you must ask every customer.</p> <ol style="list-style-type: none"><li>1. To discover the name of the program that caused the error, say: “What program were you using when the error occurred? What other programs were running at the time the error occurred?”</li><li>2. To discover the version of the program that caused the error, say: “What version of [the program in question] are you using? This information is available by choosing About in the Help menu of [the program in question].”</li><li>3. To discover the context of the error, say: “What were you doing when the error occurred?”</li><li>4. To discover any error messages that were reported, say: “What error message was reported?”</li></ol> <p>What are some other questions that may need to be asked depending on the circumstances?</p> | Listen, ask questions and respond to questions.                                                                                                                                                                                                                                                                                                                 |
| Conclusion   | NOTE: The instructor will prompt the student if he or she does not feel the student is being polite and respectful, if the student does not follow the script, or if the student does not ask the appropriate questions. If the student is not able to determine the source of the problem, the instructor can help the student brainstorm additional questions that could be asked. The student can be asked to repeat the process if they are unable to complete the task successfully after two attempts.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | On the computer provided, the student will go to the Help menu and choose About in several applications to demonstrate what this will look like to the customer. Next, an actor will call the student with a given scenario. This will happen at least twice. The student will follow the script and ask any other pertinent questions they feel are necessary. |

## Module 2: Assessment and Conclusion

**Lesson Title:** Assessment and conclusion to gathering information about the error

**Course:** Technical Support Training

**Instructor:** ATVendor staff

**Lesson Goal:** To test what the student has learned in this module, making sure they are able to use professional etiquette, listen to the customer, and follow the script to gather error details and specific information from the customer.

**Terminal Objective:** Given two mock phone calls with a customer reporting a computer error, the learner will discover the details surrounding the error.

**Desired Learning Outcomes:**

- The student will demonstrate the use of professional etiquette.
- The student will follow the script.
- The student will get the name of the program generating the error, the version of the program, the context of the error, and the specific message received by listening and asking questions as appropriate.

**Purpose of lesson:** The purpose of the lesson is to evaluate student performance and discuss ways to improve that performance, including the speed with which they do their job.

**Equipment needed:** Phones, ZoomText demonstration software, an overhead projector, one computer for every student, a computer for the instructor, a computer for the actor, access to the network, and access to customer files.

**Materials needed:** The student will require a writing utensil, paper, and documentation of both the presentation and the student guide provided on CD-ROM. The employer will provide all student materials at no charge to the student.

**Time required:** This lesson will take approximately 10 minutes.

**Location:** The lesson will take place in the boardroom of the ATVendor head office. This room contains a large table, a computer for demonstration purposes, as well as a projector. Any other equipment will need to be brought in. The actor will be placed in a quiet office apart from the boardroom.

**Synopsis of Lesson:** This lesson is an evaluation of student performance. It will involve the actor making a phone call to the learner, simulating a conversation with a real customer. Throughout two conversations the learner will have the opportunity to practice listening and following the various aspects of the script, the use of which will vary depending on the circumstances of the call. The lesson will then focus on ways to improve his or her performance and remain professional when dealing with unruly customers.

## Module 2: Assessment and Conclusion

| Event                   | Instructor Activity                                                                                                                                                                                                    | Student Activity                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Synthesize and Evaluate | NOTE: The student will be judged on how politely and respectfully they handle the call, if they follow the script, if they ask the appropriate questions, and if they are able to determine the source of the problem. | The student will participate in two mock phone calls. In one call, the actor will provide sufficient information. The student should not ask for information that was already provided. In the other call, the actor will provide only certain pieces of information; the student will have to fill in the missing information by following the appropriate script and additional questioning. |
| Extend and transfer     | NOTE: Discuss how to deal with an upset customer and customers that have difficulty providing information that is requested.                                                                                           | Listen, ask questions and respond to questions.                                                                                                                                                                                                                                                                                                                                                |

## Module 2: Assessment

Learners will record information from the call on the following form.

### AT Vendor Call Record (Student answer Sheet for Module 2)

Program(s) using when error occurred: \_\_\_\_\_

\_\_\_\_\_

Version of program(s): \_\_\_\_\_

\_\_\_\_\_

Activities surrounding error: \_\_\_\_\_

\_\_\_\_\_

Error messages: \_\_\_\_\_

\_\_\_\_\_

Frequency of error: \_\_\_\_\_

\_\_\_\_\_

Other programs running at the time: \_\_\_\_\_

\_\_\_\_\_

## Module 2: Assessment – Part 1

Based on the following article from AI Squared:

**Ai2 Kbase article#:KB00080**

**Last Updated:2005-06-12 00:00:00.0**

Screen corruption when running ZoomText 8 with TurboTax 2003

The information in this article applies to:

- ZoomText v8.0x and 8.10

### PROBLEM

When running ZoomText 8.0x or 8.1 with TurboTax 2003, the following screen corruption problems may occur:

- When typing in an edit box, text does not appear in the box until you move to the next control.
- Unmagnified elements of the TurboTax window appear over the magnified image.

Note: These problems are only known to occur on systems containing the Intel 82852 on-board video controller.

### SOLUTION

**If you running ZoomText 8.1**, this problem is resolved by installing the 8.10.1.6 update. If you are connected to the Internet, you can obtain the update by selecting Start > Programs > ZoomText 8.1 > Check for Updates. Note: The update is also available for manual download on the [Ai Squared Updates web page](#).

**If you running ZoomText 8.0x**, this problem is resolved by running the latest version of the ZoomText Driver Install Utility.

1. If you are currently running ZoomText 8.04 or 8.1, skip to step 2. If you running a version of ZoomText from 8.00 to 8.03, download and install the 8.04 update from the Ai Squared product updates web page - <http://www.aisquared.com/Support/Updates.htm>. Once the update installation is complete, restart your system, then proceed to step 2.
2. Download the ZoomText Driver Install Utility - <http://www.zoomtext.com/Software/TechSupport/Ai2DrvInst/Latest81Release/Zt8DrvInstUtil.exe>. Once the download is complete, double-click on the downloaded file: Zt8DrcInstUtil.exe.
3. When the ZoomText 8 XP and 2K Driver Setup box appears, click the Install button.
4. When the second ZoomText 8 XP and 2K Driver Setup box appears, click the OK button. Note this box says 'Success' in the corner.
5. When asked if you'd like to reboot your computer, click the Yes button.
6. After rebooting your system, you can use ZoomText and TurboTax without graphics corruption.

## Module 2: Assessment - Part 1 (Customer provides no information initially)

In this assessment, the actor provides no information, causing the learner to have to ask for all the information by following the script. The learner will be assessed on how well they follow the script, Whether or not the information was recorded accurately on the Call Record form, whether or not they asked unnecessary questions, and how professionally they handled the call.

**Assesses whether learner follows the script appropriately:**

|   | Actor's Script                                                                                                                                                                                                         | Learner's Script                                                                                                       | Learner had correct response according to the script<br>(2 points apiece – 10 points possible) |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 1 | I am having a problem with my computer.                                                                                                                                                                                | What program were you using when the error occurred?                                                                   | <input type="checkbox"/>                                                                       |
| 2 | Turbo Tax.                                                                                                                                                                                                             | What other programs were running when the error occurred?                                                              | <input type="checkbox"/>                                                                       |
| 3 | I had ZoomText running like I always do. I was writing a letter to my senator in Word and I guess I have my e-mail open too.                                                                                           | What version of ZoomText and TurboTax are you using? This information is available by choosing About in the Help menu. | <input type="checkbox"/>                                                                       |
| 4 | The Turbo Tax is version 2003 and the ZoomText is version 8.1.                                                                                                                                                         | What were you doing when the error occurred?                                                                           | <input type="checkbox"/>                                                                       |
| 5 | I was just typing in the information for my taxes. What I typed wouldn't show up when I typed it, so I kept making mistakes. It was very frustrating. When I went to type in other information, then it would show up. | What error messages were reported?                                                                                     | <input type="checkbox"/>                                                                       |
| 6 | There weren't any messages; it just wasn't doing what it seems like it should be doing.                                                                                                                                |                                                                                                                        |                                                                                                |

**Assess listening skills and information collection – as indicated on the call record form: (12 points possible)**

1. Learner indicated ZoomText was part of the cause for the error? (2 points)

- a. YES
- b. NO
- 2. Learner indicated Turbo Tax was part of the cause for the error? (2 points)
  - a. YES
  - b. NO
- 3. Learner indicated ZoomText was version 8.1? (2 points)
  - a. YES
  - b. NO
- 4. Learner indicated Turbo Tax was version 2003? (2 points)
  - a. YES
  - b. NO
- 5. Learner indicated Turbo Tax was not displaying what was typed correctly? (2 points)
  - a. YES
  - b. NO
- 6. Learner indicated that there were no error messages reported? (2 points)
  - a. YES
  - b. NO

**Overall quality (4 points possible):**

- 4. Learner asked \_\_\_\_\_ unnecessary questions?  
Item Score = (unnecessary question count) times -2
- 3. Learner handled the call politely and professionally
  - a. All the time (4 points)
  - b. Most of the time (3 points)
  - c. Some of the time (2 points)
  - d. The learner did not follow the script (0 points)

**Total Score:**    \_\_\_\_\_ / 26 = \_\_\_\_\_ %

(Points)

## Module 2: Assessment – Part 2

Based on the following article from Microsoft:

### **You receive an "Access denied" error message, and the program unexpectedly quits when you try to open or save a file in an Office program**

#### **SYMPTOMS**

When you try to open or save a file in a Microsoft Office program, you receive the following error message:

Access denied

Additionally, the program unexpectedly quits.

#### **CAUSE**

This issue may occur if the following conditions are true:

- You try to open a file that is located in a redirected folder that has been set by Group Policy, or you try to save a file to a redirected folder that has been set by Group Policy.
- The parent folder of the redirected folder does not have the **Read Attributes** permission set for you.

#### **RESOLUTION**

To resolve this issue, set the permissions on the parent folder of the redirected folder as listed in the following table.

| <b>User</b>               | <b>Permissions</b>             |
|---------------------------|--------------------------------|
| Enterprise administrators | Full Control                   |
| Domain administrators     | Full Control                   |
|                           | Traverse Folder / Execute File |
| Authenticated users       | List Folder / Read Data        |
|                           | Read Attributes                |

#### **MORE INFORMATION**

Office programs use an enhanced version of the common Microsoft Windows **Open** dialog box. This is because Office resiliency includes information about general population of the user interface and its functionality.

When you open or save a file in an Office program, a general configuration test pass verifies various parts of the program and its components. Based on this test pass, Office resiliency confirms the availability of network connections as supported networks because these connections may be needed to retrieve files and registry settings. This test pass also verifies the attributes on each folder in the directory tree.

## Module 2: Assessment – Part 2 (Customer provides some information initially)

In this assessment, the actor provides information about the program generating the error, what was happening when the error occurred, and the error message. The learner has to determine what information they have and what information they still need. The learner will need to gather information regarding the version of the application causing the error as well as the frequency of the error. The learner will be assessed on how well they follow the script, if information is recorded accurately on the Call Record form, if they ask unnecessary questions, and how professionally they handle the call.

**Assesses whether learner follows the script appropriately:**

|   | Actor's Script                                                                                                                           | Learner's Script                                                                                                                                                                                                                                                             | Learner had correct response according to the script<br>(2 points apiece – 6 points total) |
|---|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| 1 | I am having a problem with Microsoft Word. When I try to open or save a file, I get this “Access Denied” message and the program closes. | Learner listens for:<br><br>1. The program generating the error<br>2. What was happening when the error occurred<br>3. Any specific error messages<br><br>Asks:<br><br>What version of Word are you using? This information is available by choosing About in the Help menu. | <input type="checkbox"/>                                                                   |
| 2 | I am using Word version 2003.                                                                                                            | How many times has the error occurred?                                                                                                                                                                                                                                       | <input type="checkbox"/>                                                                   |
| 3 | The error occurs every time I try to open or save a file. It has been happening for the last two days.                                   | What other programs were running at the time?                                                                                                                                                                                                                                | <input type="checkbox"/>                                                                   |
| 4 | I didn't have any thing else running at the time.                                                                                        |                                                                                                                                                                                                                                                                              |                                                                                            |

**Assess listening skills and information collection – as indicated on the call record form: (12 points possible)**

1. Learner indicated that Word generated the error? (2 points)
  - a. YES
  - b. NO
2. Learner indicated that the error happened every time a file was opened or saved? (2 points)
  - a. YES
  - b. NO
3. Learner indicated that error message read “Access Denied”?
  - a. YES
  - b. NO
4. Learner indicated that the version of the application was 2003? (2 points)
  - a. YES
  - b. NO
5. Learner indicated that the error has been occurring for two days? (2 points)
  - a. YES
  - b. NO
6. Learner indicated that no other applications were running at the time of the error? (2 points)
  - a. YES
  - b. NO

**Overall quality (4 points possible):**

1. Learner asked \_\_\_\_\_ unnecessary questions?  
Item Score = (unnecessary question count) times -2
2. Learner handled the call politely and professionally
  - a. All the time (4 points)
  - b. Most of the time (3 points)
  - c. Some of the time (2 points)
  - d. The learner was unprofessional (0 points)

**Total Score:** \_\_\_\_\_ / 22 = \_\_\_\_\_ %  
(Points)