

Advanced Field Service (CRM/FS)

Category	Description	Content	Proposed Training Dates
Advanced Field Service (CRM)	Customer Lifecycle Engagement	<p>Introduction to Customer Relationship Management</p> <ul style="list-style-type: none"> • Develop the skills to create and manage organizational and corporate hierarchies • Training on how to find and maintain valid and relevant customer information while staying in compliance with Canadian anti-spam legislation • Develop the skills to research customer businesses, products and services to gain knowledge of a customer’s business to enhance service opportunities • Training on how and why we track customer communication history and share information • Develop the skills to create engagement plans and learn to be proactive with service requests 	
	Work Order Management	<p>Advanced Work Order Management Skills</p> <ul style="list-style-type: none"> • Learn to create detailed service agendas with material requirements, documented tasks and location information for on-site service • Develop the skills to documents effort, assets and costs to deliver services on time and on budget • Learn the principles and practices of and develop the skills for time and expense management • Develop the skills to manage service level agreements and entitlements • Become skilled at developing, sharing and managing customer service history information and communicating it within and across departments • Understanding and developing the skill to create and manage customer information 	
	Resource Management	<p>Advanced Resource Management Skills</p> <ul style="list-style-type: none"> • Learn to manage internal (company employees) and external (third party) resource information and utilization 	

		<ul style="list-style-type: none"> • Develop the skills to create internal resource training plans for improving employee skills and acquisition of new certificates • Learn to manage and document employee skill sets and certifications • Develop the skills to manage resource schedules, work hours, and general availability • Learn the benefits of and skills necessary to use a schedule board for real time location tracking of resources and in progress work orders • Develop the skill set of efficient scheduling 	
	Communications	Advanced Communication Skills <ul style="list-style-type: none"> • Learn the skills to leverage customer service to build stronger relationships with your customers • Determining and using your customer’s preferred medium to keep the lines of communication open • Training on writing follow up messages that give you the information you need and the customer peace of mind • Develop the skills of detailed communication pooling and sharing to facilitate multi-department support • Learn the skills to develop and maintain asset and service history information for customer facing communications 	
	Resource Mobility	Advanced Resource Mobility <ul style="list-style-type: none"> • Leverage your skills to ensure you stay up to date while out of the office • Develop your customer relationship skills to address and manage support issues for customers while you are on the road • Enhance your mobile communication skills to keep the customer service lines of communication open between resource and the scheduling managers • Develop the necessary skills and establish the processes to ensure that after hours support is effective and valued so as to improve customer retention • Develop an understanding of security risks of mobile work and learn the necessary skills to ensure that company and customer information is secure in a mobile environment 	

	<p>Business Intelligence</p>	<p>Advanced Business Intelligence</p> <ul style="list-style-type: none"> • Training on how to set and manage your company’s and your personal key performance indicators • Training on using analytics to make information driven decisions • Training in estimating and allocating and managing the costs of new work orders based historical work order analysis • Improve your reporting skills and learn to develop asset management reports with full service histories • Develop the skills necessary to empower your team with personalized reporting tools for their individual roles, targets, task lists, and customers 	

Sessions: 10+

Frequency: Twice a week recommended

Hours: 20+

Instructors: Jacob Steinfeld, Ed Michitsch, Das Karia

Course Capacity: 1-12 attendees recommended

Cost: \$225-275/hr. Prices are subject to change.