



Training Services

CAPTURING REAL TIME INTELLIGENCE. DELIVERING REAL TIME RESULTS.

VPI University Training and Coaching: A Selected Course Index

Optimal Performance with VPI University Training Services

VPI provides a variety of training courses and workshops, ranging from basic instruction to more advanced, customer-specific courses. Initial on-site application instruction, virtual refreshers, and supplemental courses ensure that your learning experience is both effective and sustained – promoting maximum ROI potential and optimizing the performance of your contact center.

Beyond application training, which is essential to the success of your technology investment, you can select the training that supports your current and future initiatives. Experts in the field of contact center optimization, VPI's professional training personnel are ready to work with your people, using highly effective and fun interactive training materials and techniques.

With this comprehensive and in-depth training, you can take full advantage of your investment by enabling your team to quickly reach peak performance. The benefits extend from the individual to the entire organization, providing both with improved productivity. The hands-on training courses and workshops will guarantee your team has the spectrum of knowledge to optimize your VPI solution.



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CAPTURING REAL TIME INTELLIGENCE. DELIVERING REAL TIME RESULTS.™

Required Activ! Performance Suite™ Application Training

Essentials for Application Training

We understand that you expect speedy implementation of your VPI solutions, qualified on-site support, minimal risks to your initiative, high acceptance among end users, and, of course, operational excellence. VPI shares your objectives. Consequently, we deliver and continue to develop training that fosters technical, operational, and financial success. The courses outlined below are essential for those who are new to the award-winning Activ! Performance Suite™ of solutions.

Activ! Server Infrastructure – 4 hours

This training session is designed for those responsible for maintaining the Activ!™ servers, such as WAN and LAN Administrators and others tasked with network responsibilities vital for the peak performance of Activ!™. This session explores, in depth, the functionality of the software's components, how the Activ!™ server interacts with other network components, and how to effectively use troubleshooting techniques and tools with the networking in view.

Activ! Performance Suite™ Administration – 4 hours

This module concerns those tasked with setting up and maintaining the Activ!™ database. System Administrator(s) will benefit from this training that teaches the means to set up a hierarchy that reflects your center(s), create log in ID's, establish security access, and populate the various database tables. Troubleshooting tips will also equip you with in-house expertise to anticipate any issues or to make adjustments even before any issues may be noticed.

Activ! Intelligence™ Administration – 4 hours

Learn how to efficiently administer the system. This training will enable you to ensure that your system is not only set up correctly, but is also kept up-to-date with changes in your technical environment.

Activ! Intelligence™ Supervisors and Managers – 8 hours

Covering both methodology and technology, this course forms the foundation for other Activ! Intelligence training. Learn how to achieve an unprecedented degree of performance through the use of real-time KPIs (Key Performance Indicators) displayed in dashboards and historical scorecards. Finally, your personnel are positioned to shape events in real-time by providing proactive responses and acting on what is actually happening, rather than upon what has already taken place.

Activ!™ Intelligence for Training Managers – 8 hours

This course instructs trainers on how to build and deploy engaging, timely training content – triggered by real-time events – and use testing to confirm understanding of content. The continued monitoring of performance against KPIs results in behavioral changes that align with your operational and financial objectives. In addition, support persons acquire knowledge and your company gains in-house competency for even faster adjustments related to the optimal performance of your Activ!™ system.

Dashboard & Scorecard Administration

From selecting KPIs to the positioning of data elements and setting thresholds, administrators receive training that equips them to design dashboards and scorecards.

Training Services

Activ!™ Evaluation Forms Creation – 4 hours

This class is for those responsible for building effective and efficient online evaluations. Enables you to understand how specific form functionality can serve the operational and business objectives of the center(s), typically by executing designs determined collaboratively on business side. The class also covers methods for maintaining and adjusting forms as business objectives and measures change. Sections, labels, questions, answers, scoring, comment boxes, collaboration sections, exporting forms, and much more is explained in this action-oriented training.

Workforce Optimization Activ!™: A VPI Approach to Coaching Quality – 8 hours

This course provides supervisors and Quality Assurance managers with the knowledge and practical, hands-on experience necessary to fully utilize the Activ!™ software. Since quick acceptance and optimal results depend upon more than knowing the bare mechanics of the user interface, coaches receive a more comprehensive framework that employs instruction in both the use of VPI's user interface and coaching – vital for maximum impact.

Essentials for New Installation Training

Training Room: Appropriate Activ! Performance Suite™ software loaded on each PC, whether for Administrators, managers, or coaches.

Class size: Depends upon training. See individual, expanded descriptions.

Projector: VPI instructor requires a projector so that attendees can visually learn the steps needed for executing tasks.



Activ!™ Server Infrastructure

Prerequisite: Administrators need to know the reason(s) they are attending the training and its importance to a successful outcome for the contact center(s). This class is practical and hand-on – participants learn by actually executing tasks while the instructor guides, observes, and comments along the way. Persons not serving as Server Administrators will not want to attend this course.

Participant profile: LAN Administrators, server support personnel, or IT professionals who are responsible for the care and maintenance of the Activ!™ server(s).

Objectives:

1. Name and explain the functionality of the three software components of Activ! Voice, View and IQ
2. Utilize the Client Explorer window efficiently
3. Explain the network components relevant to the Activ! Performance Suite™
4. Cover terms used when discussing Activ!™ Voice, View and IQ solution
5. Discuss the network connectivity of Activ! Performance Suite™
6. Explain how the Activ!™ View, Voice and IQ database tables work
7. Delineate information needed to place effective support calls to VPI
8. Discuss the help VPI Support Center provides and the process
9. Effectively use troubleshooting techniques and tools

Course duration: 4 hours

Attendee limit: 4

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation, executing tasks

Class location: Your site

Materials include: Official Activ!™ View, Voice and IQ Server Infrastructure Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Activ!™ Voice, View and IQ Administration

Prerequisite: Administrators need to know the reason(s) they are attending the training. This class is practical and hand-on – participants learn by actually executing tasks while the instructor guides, observes, and comments along the way.

Participant profile: Persons charged with developing and maintaining the database(s) for Activ!™ software solution.

Objectives: This session equips attendees to:

1. Establish database tables
2. Automatically import agent settings from other applications via spreadsheet
3. Set-up database for workstations
4. Enter information for customization of evaluation forms
5. Create security templates for administration, evaluations and monitoring, tailoring them for needs of contact center
6. Use utilities to make changes swiftly and smoothly

Attendee limit: 4

Training duration: 4 days

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation executing tasks

Class location: Your site

Materials include: Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Activ! Intelligence™ System Administrator

Prerequisite: Supervisor course

Participant profile: Persons responsible for creating and maintaining database for Activ! Intelligence

Equips participants to:

1. Create and manage roles
2. Manage users and groups
3. Override the default dashboards to group
4. Assign specialist dashboards to groups
5. Assign specialist dashboards to individuals
6. Understand architecture to a degree necessary for administration
7. Overview of telephony systems, data sources and site entries and registry variables
8. System status reports and messages
9. Self-maintenance features
10. Backing up database

Attendee limit: 6

Training duration: 4 hours

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation executing tasks

Class location: Your site

Materials include: Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Activ! Intelligence™ for Supervisors and Managers

Prerequisite: None

Participant profile: Persons responsible for creating and maintaining database for Activ! Intelligence

Equips participants to:

1. Comprehend the goals and objectives of running a dashboard
2. Understand the data elements
3. Become familiar with primary view, messaging and training links
4. Launch training from dashboard
5. Quizzing
6. Create a course redo
7. Publish
8. View and use reports: roll-up, drill down, telephony, custom, scorecards
9. Exporting reports

Maximum participants per workshop session: 16

Training duration: 4 hours

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation executing tasks

Class location: Your site

Materials include: Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Activ!™ Coaching for Training Managers

Prerequisite: Activ! Intelligence™ for Supervisors and Managers

Participant profile: Persons responsible for training and coaching agents

Equips participants to:

1. Author coaching content
2. Develop an authoring methodology
3. Add graphics
4. Use multi-media capabilities
5. Create quizzes
6. Upload content
7. Grasp overview of the LCMS (Learning Content Management System)
8. Create new catalog entries
9. Determine relevance period
10. Set prerequisites
11. Use publishing options
12. Set schedule to activate content for learning
13. Set timeframes
14. Set pass requirements for learners
15. Understand status reports, report cards and repeated course reports

Maximum participants: 16

Training duration: 8 hours

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation executing tasks

Class location: Your site

Materials include: Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Activ!™ Intelligence Dashboards and Scorecard Administrator

Prerequisite: Activ! Intelligence for Supervisors

Participant profile: Persons responsible for planning and building dashboards

Equips participants to:

1. Plan dashboards (views) and KPI measures
2. Create dashboards
3. Set colors for thresholds and use gauges for impact
4. Select KPIs and runtime data
5. Understand authoring methodology
6. Add graphics and arrange data elements
7. Create interactive buttons and manage multiple views
8. Publish and upload dashboards for use in center and other areas of business
9. Create scorecard views
10. Select desired KPIs for scorecards
11. Create links to scorecards from dashboards

Maximum participants per workshop session: 16

Training duration: 4 hours

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation executing tasks

Class location: Your site

Materials include: Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Activ! IQ™ Creating Evaluation Forms

Prerequisite: None

Participant profile: Those who will *create* and maintain the online form for used by quality analysts, managers, or coaches.

Equips attendees to:

1. Use the tool bar
2. Build lists for headers
3. Organize with tabs
4. Construct and manage answers
5. Make and position questions
6. Choose among scoring structures: by sections or by questions
7. Create feedback areas
8. Design headings for optimal user friendliness that guides users
12. Design type of questions that best serve measurement
13. Import and import forms
14. Embed security rights into select evaluation forms

Maximum participants: 16

Training duration: 4 days

Attendee limit: 4

Instructor: VPI Certified Technical Training Specialist

Instruction approach: Explanation, demonstration, question and answer, active participation executing tasks

Class location: Your site

Materials include: Reference guide

Date: See www.VPI-corp.com for scheduled dates.

Workforce Optimization using Activ!™ Voice, View, IQ & QM Dashboard: A VPI Framework for Coaching

Prerequisite: Participants must have a clear understanding of why they are attending

Suggested participants: Team leads, supervisors, coaches, QA/QM specialists and leaders determined to optimize the development and effectiveness of their agents – the forefront of operational and financial success.

Objectives: This workshop equips attendees to:

1. Retrieve recordings and evaluations
2. Manage storage of recordings: type and duration (according to user rights)
3. Flag with colors for classification
4. Use recordings and evaluations in tandem, whether split screen or easy alternating
5. Create a variety of relevant graphs
6. Export graphs
7. Use a 5 step framework that conduces to effective performance management effort
8. Describe the role of the Activ!™ software in the sustained performance improvement
9. Explain and discuss the criticality of coaching component in sustained performance improvement
10. Define desired behaviors and ways to promote them
11. Demonstrate effective mentoring skills
12. Create alignment between agent success and contact center goals
13. Employ proven methods for effective coaching with recorded interactions

Maximum participants per workshop session: 16 persons

Duration of class: 8 hours

Room Requirements:

- Room size commensurate with number of participants
- Each person requires One PC (with the Activ!™ View, Voice and IQ software)
- Projection equipment and screen for instructor
- Flip chart or white board and markers

Instructor: VPI Certified Training Professional

Instruction process: Demonstration, hands-on instruction, role-play

Locale: Your site

Materials include: Reference sheets, job aids, work sheets, quiz video recording

Selection of Workforce Optimization Courses

Advanced Coaching Skills

Prerequisite: Participants must understand why they are attending. Passion and skill are symbiotic!

Who should attend this workshop: Coaches and prospective coaches (e.g., team leaders, supervisors, QA specialists, and trainers)

Workshop equips attendees for:

1. Learning why and how your coaching style shapes outcome
2. Learning and using the four coaching styles
3. Using the four learning styles for maximum impact and retention
4. Initiating, exploring, asking, involving, measuring, concluding
5. Coaching equilibrium: coherence and the larger view
6. Motivating goals
7. Creating clear objectives
8. Sowing seeds of retention
9. Using language of empathy
10. Demonstrating skills effectively

Duration of class: 8 hours

Maximum participants per workshop session: 16 persons

Room Requirements:

- Room size commensurate with number of participants
- Each person requires one PC (with the Activ!™ View, Voice and IQ software) and two headsets per pair of attendees..
- Projection equipment and screen for instructor
- Video player with TV and/or projection
- Flip chart or white board and markers (fruit scented)

Instructor: VPI Certified Training Professional

Instruction process: Demonstration, self-assessments; interactive, scenario-based role plays; video recording and analysis

Locale: Your site

Materials: Reference sheets, discovery sheets, quiz, video

Change Management for Agents: Introduction and Buy-in

Prerequisite: None

Who should attend this workshop: Agents who will experience these technologies – they are often anxious to understand how they will be impacted.

- Create atmosphere of communication, the heart of change management
- Underscore management's support with company champion of initiative
- Introduction of philosophy behind technology
- Explanation of how technology supports larger company and center goals
- Outline of benefits, supported by research, anecdotes and case studies
- Questions and answers (some may have to be addressed by management)

Duration of class: 1 hour

Maximum participants per workshop session: 30

Room Requirements:

- Room size commensurate with number of participants
- Projector to demonstrate technology
- Flip chart for capturing concerns, hopes and questions

Instructor: VPI Certified Training Professional

Instruction process: Case studies revealing beneficial aspects of technology for center and each agent, demonstration, question and answer

Locale: Your site

On-Demand Training

VPI offers shorter refresher courses, typically 2 hours via WebEx.

VPI is also building a library of modules available for download, for on-demand refresher training.