

cxReveal User & Supervisor Training

cxReveal's search and replay functionality empowers customer service representatives to resolve customer issues quickly and with enhanced insight by leveraging Tealeaf's replay capability. In the morning session of this class, all cxReveal users will learn how to locate and review a customer session, proactively resolve the issue, and leverage Tealeaf's extensive database of customer information for customer recovery purposes.

In the afternoon, supervisors and escalation teams learn advanced search tools, including basic investigation on the impact of a particular site issue, and how to optimize the search process for their teams. They also learn how to add and edit individual users' and groups' Tealeaf permissions based on role responsibilities. Depending on their installation, they may access built-in reports to monitor their teams' utilization of Tealeaf (with cxView's dashboard capabilities), and/or how to complete more advanced analysis of site issues (with cxResults).

Course Description

This course is focused on providing customer service representatives and supervisors with the knowledge and skill needed to take advantage of Tealeaf's vast data repository to resolve customer issues. This is accomplished through guided walkthroughs of the cxReveal functionality, reinforced by hands-on exercises that reflect real-world situations.

Target Audience

This course is specifically designed for new Tealeaf users who will use cxReveal to resolve customer issues and investigate escalated issues, and the supervisors who manage these teams.

Pre-requisite

None

Objectives

After completing this course, all participants will be able to:

- Describe the benefits of the Tealeaf cxReveal tool to Customer Service Agents, Tier II Support and the company's customers.
- Determine the best methods to search for a customer session as well as appropriate situations to search and replay.
- Use Tealeaf to understand and validate an online customer issue.

Those participants taking the additional escalation and administration modules will:

- Use Tealeaf to research site issues.
- Access and customize dashboards to track user activity.
- View how to add and edit users and groups.
- Customize search templates to enable your team to quickly identify the appropriate customer session.

Course Materials

cxReveal Training Materials (to be provided upon arrival to training course).