



# Customer Sales and Service Representative (CSSR)

MSB103 / 450 Hours / 12 Months / Self-Paced / Materials Included

## Course Overview:

Sales is arguably the most important function in any business, yet it's one of the most difficult areas to master and manage successfully. There are several common questions people ask about sales. What is the difference between sales and marketing? Why do consumers and organizations buy, and what drives their purchase decisions? What are the key competencies required for effective sales? This course highlights the important role that the sales function plays and describes how marketing and sales relate to each other. It outlines the roles and responsibilities of the Sales Department, what makes for effective sales, and the trends affecting sales today. The course also provides insight into the importance of the sales cycle and how it affects sales planning and business development.

It costs a business much more to acquire a new customer than it does to retain an existing one. So it makes sense that a business must do everything it can to support and satisfy existing customers. Handling complaints effectively and efficiently can result in increased customer loyalty. Today's Customer Service Representatives (CSR) and support centers have a vital role to play in ensuring customers' needs are addressed in an effective, efficient manner. This course will familiarize the individual with the basic role of the CSR and the environment in which he performs his duties, including typical roles of the CSR in a support environment, basic tasks accomplished by the CSR, the support center and customers role in a support environment, how the support center has evolved, and company and support center best practices. This course prepares individuals interested in the CSR certification, which is targeted at individuals wishing to qualify for work in a customer support center or help desk environment.

## Course Outline:

### Sales Foundations

- [Introduction to Sales](#)
- [Strategic Sales Planning](#)
- [Preparing for Successful Sales](#)
- [Developing Strong Customer Relationships](#)
- [Working within the Sales Culture of Your Organization](#)
- [Developing a Customer-focused Sales Approach](#)
- [Don't Only Go For the Big Fish](#)
- [The Ethics of Gift Giving](#)
- [Using Persuasion Techniques to Boost Sales](#)
- [Get It Together: Organizing Your Sales Approach](#)
- [Presentations that Get People Talking](#)
- [Initiating Discovery Meetings](#)
- [The Proof Is in the Proposal](#)
- [Building Momentum in Discovery Meetings](#)
- [Using Customer Knowledge to Advance Sales](#)
- [Appealing to Prospects](#)
- [Getting Your Head Around Pipeline Management](#)
- [Prospecting Strategically](#)

## Sales Negotiations

- [Negotiation Skills for Sales Professionals: Preparing to Negotiate](#)
- [Negotiation Skills for Sales Professionals: Value Exchange](#)
- [Negotiation Skills for Sales Professionals: Reaching Agreement](#)
- [Talking Value with Your Customers](#)
- [Dealing with Questions, Objections, and Resistance](#)
- [Dealing with Negotiation Challenges](#)
- [Creating a Customer-focused Organization](#)
- [Negotiating Contract Terms](#)
- [Communicating Your Company's Value](#)
- [Turning Obstacles into Opportunities](#)
- [Negotiating with Your Customer](#)

## Solution Selling

- [Solution Selling: Mastering the Essentials](#)
- [Solution Selling: Meeting an Active Need](#)
- [Solution Selling: Creating New Opportunities](#)
- [Turning Potential Customers into Allies](#)
- [Preparing to Implement Solutions](#)
- [Managing Implementation Problems](#)
- [Connecting Customers and Solutions](#)

## Strategic Account Sales Skills

- [Selling to Key Players](#)
- [Selling the Positive First Impression](#)
- [Building relationships](#)
- [Crafting Sales Strategies](#)
- [Pricing Strategy](#)
- [Performance Payout Plans](#)
- [Sales and Marketing: Two Sides of the Same Coin?](#)

## Sales Management

- [Developing and Leading Your Sales Team](#)
- [Planning Direct Mail to Generate Leads for Complex Sales](#)
- [Sales Support Roles For Better Customer Interaction](#)

## Essential Selling Skills

- [Essential Selling Skills: Mastering Cold Calling](#)
- [Essential Selling Skills: Qualifying Sales Prospects](#)
- [Essential Selling Skills: Closing the Sale](#)
- [Effective Cold Calling](#)
- [Prompting Action Through Focused Communication](#)
- [Regaining Your Customer's Trust](#)

- [Getting Organized to Meet Your Sales Goals](#)
- [Making Contact: Access Strategies](#)
- [Managing a Sales Pipeline](#)
- [Demonstrating Business Acumen](#)

## Frontline Call Center Skills

- [Managing Your Time: The Importance of Call Tracking and Ticketing](#)
- [Creating an Effective On-hold Message](#)
- [Aligning Agent Behaviors with Caller Types](#)
- [Determining Proper-Expectation-management Techniques](#)
- [Training Methods for CSRs in the Customer Contact Industry](#)

## Inbound Call Center Management

- [Converting a Call Center to a Profit Center](#)
- [Managing Your Call Center More Efficiently](#)
- [Customer Service Training – The Interview and Beyond](#)
- [Disaster Recovery – Keeping the Lines Open](#)
- [Preventing Agent Absenteeism through Better Working Conditions](#)
- [Workforce Management Software - Is It Worth It?](#)
- [Prioritizing Rewards and Recognition in Call Centers](#)

## ITIL® 2011 Edition Foundation Syllabus

- [ITIL® 2011 Edition Foundation: ITIL® and the Service Lifecycle](#)
- [ITIL® 2011 Edition Foundation: Service Strategy Fundamentals](#)
- [ITIL® 2011 Edition Foundation: Service Strategy Processes](#)
- [ITIL® 2011 Edition Foundation: Service Design Fundamentals](#)
- [ITIL® 2011 Edition Foundation: Service Design Processes](#)
- [ITIL® 2011 Edition Foundation: Service Transition Processes and Policies](#)
- [ITIL® 2011 Edition Foundation: Introduction to Service Operation](#)
- [ITIL® 2011 Edition Foundation: Service Operation Processes](#)
- [ITIL® 2011 Edition Foundation: Continual Service Improvement](#)

## ITIL® 2011 Edition Overview

- [ITIL® 2011 Edition Overview: Creating a Service Culture](#)
- [ITIL® 2011 Edition Overview: Introduction to the ITIL® Framework](#)
- [ITIL® 2011 Edition Overview: Certification and Benefits](#)

## ITIL® 2011 Edition Intermediate Level: Operational Support & Analysis (OSA)

- [ITIL® 2011 Edition OSA: Introduction to Operational Support and Analysis](#)
- [ITIL® 2011 Edition OSA: Introduction to Event Management](#)
- [ITIL® 2011 Edition OSA: Introduction to Incident Management](#)
- [ITIL® 2011 Edition OSA: Incident Management Interactions](#)
- [ITIL® 2011 Edition OSA: Introduction to Request Fulfillment](#)
- [ITIL® 2011 Edition OSA: Request Fulfillment Process Interfaces and Challenges](#)

- [ITIL® 2011 Edition OSA: Introduction to Problem Management](#)
- [ITIL® 2011 Edition OSA: Problem Management Process Interfaces and Challenges](#)
- [ITIL® 2011 Edition OSA: Introduction to Access Management](#)
- [ITIL® 2011 Edition OSA: Introduction to the Service Desk](#)
- [ITIL® 2011 Edition OSA: Service Desk Metrics and Outsourcing](#)
- [ITIL® 2011 Edition OSA: Introduction to Functions](#)
- [ITIL® 2011 Edition OSA: Function Activities](#)
- [ITIL® 2011 Edition OSA: Technology and Implementation Considerations](#)

### Customer Service Representative, Professionalism

- [The Customer Service Representative \(CSR\)](#)
- [Support Center Services and Work Environment](#)
- [Team and Customer Relationships](#)

### Customer Service Representative, Skills

- [Customer Interactions](#)
- [Communication Skills](#)
- [Conflict, Stress, and Time Management](#)

### Customer Service Representative, Process

- [Customer Service Processes and Procedures](#)
- [Quality in a Support Center](#)
- [Support Center Tools, Technologies and Metrics](#)
- [Dealing with Irrational Customers and Escalating Complaints](#)

### Customer Service Fundamentals

- [Customer Service Fundamentals: Building Rapport in Customer Relationships](#)
- [Customer Service in the Field](#)
- [Customer Service over the Phone](#)
- [Internal Customer Service](#)
- [Customer Service Confrontation and Conflict](#)
- [Shaping the Direction of Customer Service in Your Organization](#)
- [Aligning Performance to Key Indicators](#)
- [The Angry Caller: What's Your Plan?](#)

### Customer Focus

- [Identifying and Managing Customer Expectations](#)
- [Creating and Sustaining a Customer-focused Organization](#)
- [Customer-focused Interaction](#)
- [Listening to your Customers](#)
- [Developing Your Customer Focus](#)

### Customer Advocacy

- [Customer Advocacy: Communicating to Build Trusting Customer Relationships](#)

- [Customer Advocacy: Enhancing the Customer Experience](#)
- [Customer Advocacy: Supporting Customer Advocacy](#)

## Certifications:

This course prepares students to take the **HDI Customer Service Representative** certification exam. **The price of the course includes the price of the certification exam.**

## System Requirements:

### Internet Connectivity Requirements:

- Cable and DSL internet connections are recommended.

### Hardware Requirements:

- Minimum Pentium 400 Mhz CPU or G3 Macintosh. 1 GHz or greater CPU recommended.
- 256MB RAM minimum. 1 GB RAM recommended.
- 800x600 video resolution minimum. 1025x768 recommended.
- Speakers/Headphones to listen to Dialogue steaming audio sessions.
- A microphone to speak in Dialogue streaming audio sessions.

### Operating System Requirements:

- Windows Vista, 7, 8, 8.1, 9, 10
- Mac OSX 10 or higher.
- OpenSUSE Linux 9.2 or higher.

### Web Browser Requirements:

- Google Chrome is recommended.
- Firefox 13.x or greater.
- Internet Explorer 6.x or greater.
- Safari 3.2.2 or greater.

### Software Requirements:

- Adobe Flash Player 6 or greater.
- Oracle Java 7 or greater.
- Adobe Reader 7 or greater.

### Web Browser Settings:

- Accept Cookies
- Disable Pop-up Blocker.

**\*\*Outlines are subject to change, as courses and materials are updated.\*\***