{Company Logo Pic}

Account Manager Unplanned Event 1: Billing Problem

Account Managers

New Hire Program

Instructor Guide

Preparation

Overview

The *Billing Problem* unplanned event is an activity in which Account Managers will be walked through the activities to resolve a customer's billing concerns.

Timing/Agenda

The *Billing Problem* unplanned event should take approximately **30 minutes** to complete, as follows:

Topic Name	Time
Unplanned Event Overview and Set the Stage	5 Minutes
Discussion and Initial Considerations	10 Minutes
Resolution	15 Minutes
Wrap-Up	5 Minutes

Performance Objectives

After completing this module, participants will be able to:

- Resolve a customer's billing problem.

Preparation

Prior to the unplanned event, Instructors need to do the following:

- Make sure all supplies and equipment are ready (see following list).

Classroom Set-Up

Instructors must ensure that:

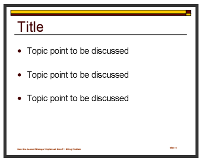
- **Account_Manager_New_Hire_UE01_Billing_Problem** unplanned event slide deck is ready to present.

Transition

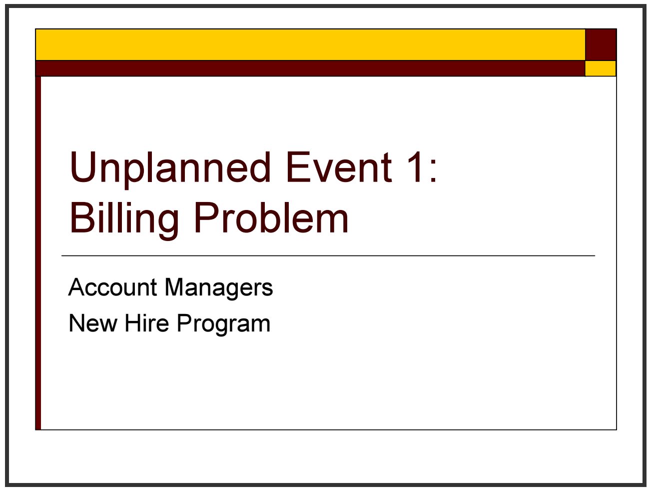
Transition to the Unplanned Event Overview and Set the Stage.

Unplanned Event Overview and Set the Stage

Unplanned Event 1: Billing Problem



DISPLAY Slide 1: Billing Problem



Direct the participants to the unplanned event.

INSTRUCTOR NOTE: *The objectives are not listed at the beginning of the unplanned event so that it will seem authentic.*

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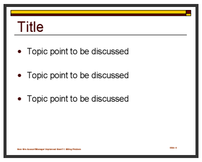
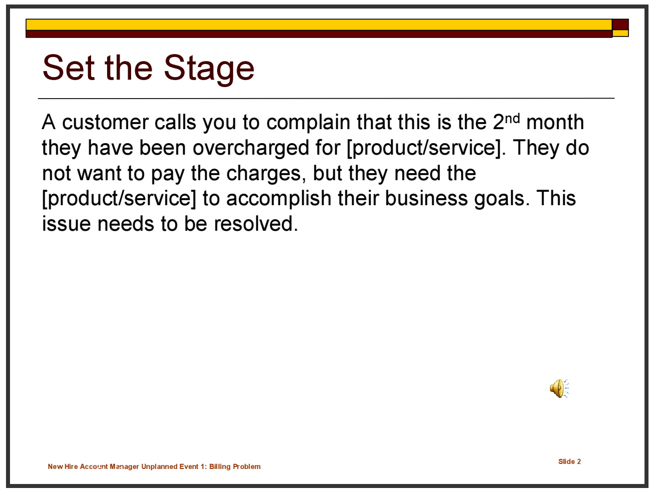
Unplanned Event Overview and Set the Stage, Continued

Set the Stage



DISPLAY Slide 2: Set the Stage

INSTRUCTOR NOTE: *The phone ringing sound will occur once.*



Read the Set the Stage scenario.

A customer calls you to complain that this is the second month they have been overcharged for [product/service]. They do not want to pay the charges, but because they need [product/service] to accomplish their business goals. The issue needs to be resolved.

The Set the Stage scenario of the unplanned event may be modified somewhat to fit the needs of the class and to increase relevance.

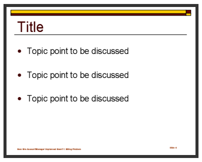
- Be sure that any modifications emphasize the urgency and potential issues that may arise from not properly handling the unplanned event.
- Some ways that the Set the Stage scenario may be modified include:
  - Role play within the classroom among the co-instructors.
  - Role play with one participant (and receives help from classmates).
  - PowerPoint voice recording of the phone ringing and customer calling a selected participant.
    - An instructor may record the scenario using PowerPoint prior to the class session. Directions for creating PowerPoint recordings may be found at: http://office.microsoft.com/en-us/powerpoint/HA012303051033.aspx#1.

Transition

Transition to the Discussion and Initial Considerations.

Discussion and Initial Considerations

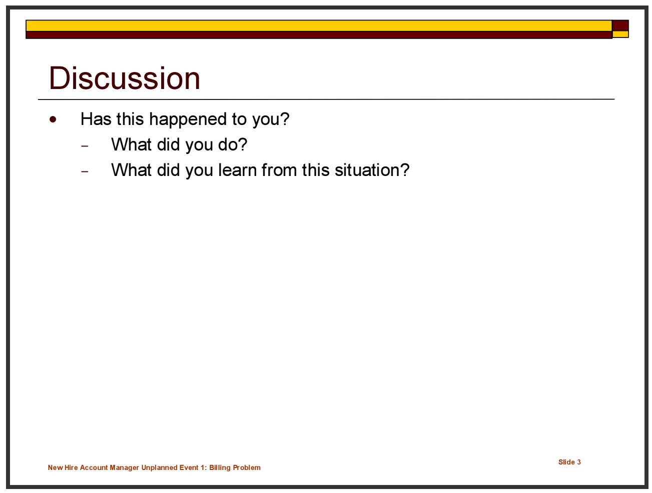
Discussion



DISPLAY Slide 3: Discussion

Purpose:

Account Managers will draw upon their experiences to determine the process for resolving the customer's billing problem.



Ask each of the following questions. Encourage participants to draw upon their experiences to determine what needs to be done for a customer with a billing problem.

- Has this happened to you?
  - What did you do?
  - What did learn from the situation?

Note: Answers will vary according to class.

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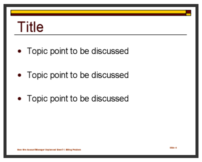
Discussion and Initial Considerations, Continued

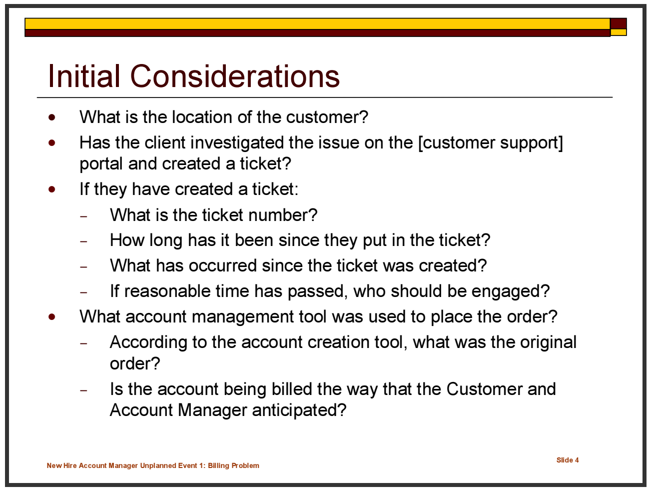
Initial Considerations



DISPLAY Slide 4: Initial Considerations

Purpose:

Account Managers will discuss the items they should consider when initially investigating a customer's billing problem.



State each of the questions that an Account Manager would ask (or consider) when beginning an investigation of the issue. **Ask** participants why each question is important as an initial considerations. After several responses, **add** the following points – only if needed – regarding the question:

- What is the location of the customer?

  Explain: This information lets the Account Managers know where the bill is being processed.

- Has the customer investigated the issue on the [customer support] portal and created a ticket?

  Explain: If the customer has not done so, the Account Manager should direct them to go to the [customer support] portal.

- If they have created a ticket:
  - What is the ticket number?
  - How long has it been since they put in the ticket?
  - What has occurred since the ticket was created?

  Explain: Depending on when the Customer submitted the ticket, Account Managers may advise the Customer to allow the support team to work through the resolution process. If a reasonable amount of time has passed, the Account Managers will need to escalate the issue.

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Discussion and Initial Considerations, Continued

Initial Considerations, Continued

- If reasonable time has passed, who should be engaged?

  Explain: If the issue needs to escalated, the Account Manager will need to find out who should be engaged. This may vary according to business unit. Your manager may provide guidance.

- Which account management tool was used to place the original order?

  Explain: The response to this question will determine where and how to correct the bill.

- According to the account management tool, what is the original order?

  Explain: The Account Manager will determine whether the components on the original order match the components on the bill. Also, the Account Manager will determine whether the price on the original order matches the price on the bill.

- Is the account being billed the way that the Customer and Account Manager anticipated?

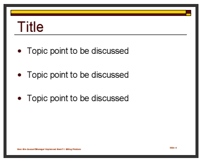
  Explain: The billing method selected in the account management tool may generate a different price than what the Customer and Account Manager anticipated.

Transition

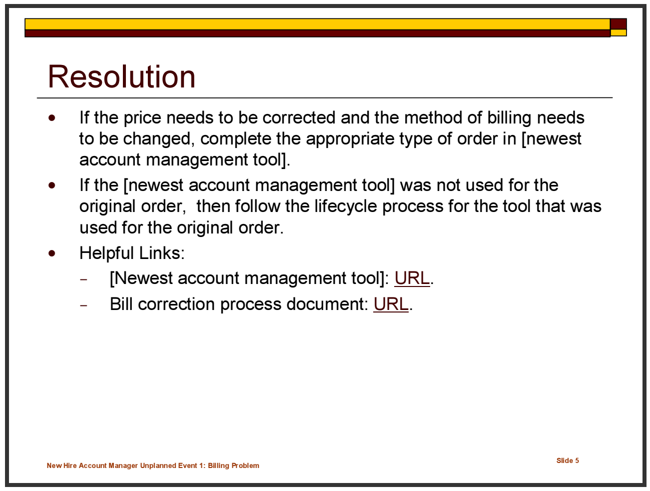
Transition to the Resolution.

Resolution

Resolution



DISPLAY Slide 5: Resolution



State each of the following actions. Explain the steps and resources for each of the actions.

- If the price needs to be corrected and the method of billing needs to change, complete the appropriate type of order in the [newest account management tool].
- If the [newest account management tool] was not used for the original order, then follow the lifecycle process for the tool that was used for the original order.
- Helpful links:
  - [Newest account management tool]: URL.
  - Bill correction process document: URL.

Explain: To complete this action, go into the [newest account management tool] located at [URL]. If needed, review the process steps found in the bill correction process document located at [URL]. Please note that the processes may change, so be sure to go to the links to stay current.

Wrap-Up

Review Performance Objectives

Review the performance objective for the unplanned event and ensure that participants feel that the objective was met.

Participants were able to:

- Resolve a customer's billing problem.

Discuss the following topics during the wrap-up:

- Ask the participants if they feel the objectives were met.
- Ask participants: "What questions do you have?"
- Answer their questions.

Next, we'll discuss the *Selling [Product/Service]* module.