

SQO eLearning Outline

Proposed timeline:

Alpha Development	10 days
Alpha Review	TBD
Beta Development	6 days
Beta Review	TBD
Gold Dev	3 days
Gold/Sign off	TBD

Notes: If there are any major feedback in review, the timeline is subject to change. Company Holiday, June 19th & July 4th, July 5th is a Friday.

Purpose:

This learning is a high-level eLearning applicable to all audiences (Care, Sales, OM) that introduces the SQO application, by helping users become more comfortable navigating the system.

Learning objectives:

- Observe how a customer's needs are translated into a Sales Order Agreement.
- Comprehend how to create and amend proposals in SQO.
- Understand how to navigate SQO.

eLearning outline:

1. Introduction
 - a. Customer story: Customer has their vision of choices and needs that fit within their business.
 - i. Customer needs email/list
 - b. Transition to SQO application
 - i. How to access SQO
 - ii. Story: Agent needs to start by pulling the customer's needs into SQO. The solution is agreed upon and proposed.
2. Proposal time
 - a. Working with customer information
 - i. Story: Agent asks the customer for their information to fill out the SQO fields.
 1. Lead > opportunity (CB sales) launched in CB Sales to quote customer.
 2. when launched first proposal enter customer info
 3. enter in the fields of contact, same info and edit later.
 - ii. Video/Labeled graphic of how agent would navigate SQO.

- b. Working with sites
 - i. Story: Agent asks the customer for their sites to fill out the order.
 - ii. Video/Labeled graphic of how agent would add sites SQO.
 - iii. >add site to proposal
 - iv. Video/labeled graphic of how agent would complete.
- c. Working with products and packages (-adding and config products by site and template)
 - i. Site vs. Template
 - ii. >2 ways
 - iii. Templates**
 - 1. Story: Agent is no longer on the phone with the customer, but is now working through their discussed needs and agreed upon products/services.
 - iv. Site (individual Products)
 - v. Packages
 - 1. Video/labeled graphic of using a product package.
 - 2. Video/labeled graphic of configuring products.
 - 3. Video/labeled graphic of assigning products to a site.
- d. How to finalize and amend proposals
 - i. Story: Agent must call customer back to ensure the proposal is exactly what the customer needs before confirming finalization. Customer confirms but now wants an additional product. Amend the agreement and send it over for finalization.
 - 1. Video/labeled graphic of how to amend an agreement.
 - 2. Video/labeled graphic of how to send over finalization/SOA.
- 3. Review and Summary
 - a. Review key takeaways
 - b. Reference any other documents/places to view
 - c. Congrats youre awesome!

- i. Completion of eLearning
- ii. Review learning objectives
- iii. Exit course