

TAA Outreach Phone Calls- Scenario Training (Role Play)

OVERVIEW

Developing ease and rapport in cold-calling customers is an essential component of a successful TAA outreach engagement strategy. The Training Scenarios below are provided to training staff on becoming sensitive to typical types of customer responses that may come up during outreach calls, and are designed to provide to staff with the knowledge needed to engage potentially eligible workers.

Each scenario represents a different type of challenge, numbered in the list below *from easiest to most difficult*.

If feasible, training can be conducted in a group setting to maximize feedback and group learning. This is especially true of the most challenging scenarios at bottom of list, where trainees can benefit from senior staff sharing real life experiences to enhance the learning opportunities.

SET UP

- Mock Customer:
 - Designate coworkers and approved staff to play a mock customer.
 - Mock customer will respond based on prompts presented.
- Trainee:
 - Practice performing necessary outreach for each scenario, collecting information as indicated. Scenarios can be repeated as needed before moving on.
- Staff Review:
 - Trainees can review expectations provided in this section pre- and post-call.
 - Record each call to allow for immediate listening and feedback before either repeating scenarios or moving on to the next.
 - Discussion and feedback should explore the factors relevant to each customer prompt scenario (e.g. how staff verify ID, explain Trade Act (Elevator Speech) and process eligibility documents and follow up in the system.

CUSTOMER DETAILS

Name: Barbie Doll

SSN: 123456789

DOB: 1/1/1974

CID: 12-123-123-123

Address: 123 Main St., Salem, Or 97317

Phone: 971-123-5555

Current Employer: Net Fish Inc Start: 1/1/2023 Wage: \$24/hr Skill: less than trade affected employment

Trade Affected Employer: Logging Mill 101 Qualifying Layoff: 1/1/2021

CUSTOMER PROMPTS

Customer Prompt #1 (Hang up) - Customer: (Immediately hang up when staff call to explain who they are).

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Staff Review: trainee should be able to determine if the person was disconnected or intentionally hung up- follow up with email if on file providing general information and way to contact our hotline should they be interested in learning more- case note properly and if intentionally hung up on- assume no contact – take off call list

Customer Prompt #2 (Engaged) - Customer: Be easy going and pleasant. Give ID verification in response to request and be interested in hearing about trade. Ask about trade act and what it is. Fill out eligibility form (RFD).

Staff Review: Trainee should be able to describe the Trade Act program briefly, discuss the petition and individual eligibility and process the customer applying and being provided services as appropriate.

Customer Prompt #3 (Verify ID) - Customer: Be easy going and pleasant, but hesitant to verify ID. Ask about the program but you are not interested at this time.

Staff Review: Trainee can offer a partial part of a list of acceptable ID points without divulging confidential information to barter with customer and set them at ease to verify 2 other items- example

- I see that you live at house number 1121 would you be able to tell me the street and DOB SSN-
- I see that you were born on 03/23 would you be able to tell me the year and SSN and Address

Other options to share to reassure customer:

- Your caller ID will show our hotline number as the number I am calling from,
- Google search our website and they can see that the hotline number is legitimate
- follow up with email

The standard for all calls would be to attempt to verify ID and disclose call is being recorded as listed in practice above

Customer Prompt #4 (Unsure of Layoff) – Customer: Be hesitant to provide ID. You don't think you were ever laid off. Can possibly end up verifying ID and may need more information.

Staff Review: After customer verifies ID and accepts call is being recorded, trainee can continue the call. Trainee would use alternative terminology such as furlough, curtailment, or temporary time off. If you have UI data you can provide general time frame this partial or total layoff would occur to provide clarity for customer, without feeding them specific dates or coaching their answer. If customer continues to deny they were ever laid off, thank them for the time and case note appropriately.

Customer Scenario #5 (Still Working/In Suitable Work/Retired) – Customer: Be hesitant to provide ID. Say you are working at suitable work (more pay same skill)

Staff Review: Trainee can provide brief Trade Act program information and ask customer about their current work status.

Trainee: encouraging message (e.g., "That's wonderful!"). Follow up sample questions:

- "Are you currently working full time?"

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- “Are you still working for X company?”
- “Are you retired and thinking about part time work?”

Review age and mention RTAA to provide potential options. Example “In this economy or if you want to work a bit and your retirement situation changes, give us a call!”

Mention that the program goal is to help affected workers get back to suitable employment (provide brief definition of wage and skill set that is considered suitable).

Customer can utilize the potential training benefit later when there is change to their employment status.

Note that the best way to determine and identify their potential benefit is to complete and return the RFD.

If customer declines offer, trainee can still encourage client to contact TAA hotline in the future, especially if they have a change in circumstances.

Add appropriate case note and mark off from additional outreach calls.

Customer Prompt #6 (Not Suitably Employed)– Customer: Be hesitant to provide ID. You are working under suitable wage (less pay, same skill or less skill, same pay).

Staff Review: Trainee can provide brief Trade Act program information and ask customer about their current work status.

Example: “Are you currently working full time?”

Since customer mentions that they are working full time, but the pay is less than before. Customer mentions that the pay is the same or higher but the skill employed is much less complicated and entailed.

Trainee would mention that the program goal is to help affected workers get back to suitable work and this is a great opportunity for customer to look into how we can help them obtain suitable working jobs.

Trainee can provide brief list of TAA training benefits that could be used to achieve this goal of finding suitable work to spark customer interest and try to obtain complete RFD. i.e., work-based learning, licensure, vocational training, classroom training etc.

If customer declines offer, trainee can still encourage client to contact TAA hotline in the future when they are ready.

Additional Discussion: Here are some additional scenarios to present and discuss with trainees that do not necessarily need full scenarios.

1. Caller has moved out of Oregon and currently reside in another state.
2. Caller is suspicious of the call refuses to verify ID and asks about their UI benefits and/or UI related questions.
3. Caller does not want to engage with Trade due to previous bad experience.