

# Family Connect Training Check



The only checklist you'll ever need

|                                  |    |
|----------------------------------|----|
| Welcome to EE – Day 1.....       | 1  |
| Getting to know EE – Week 1..... | 2  |
| System Overview – Week 2.....    | 3  |
| Broadband – Week 3.....          | 4  |
| PayM Compliance – Week 4.....    | 5  |
| Existing Customers – Week 5..... | 13 |
| New Customers – Week 6.....      | 15 |
| Service                          |    |
| Repairs.....                     | 17 |
| Extra.....                       |    |





# WELCOME TO EE

## DAY 1

WELCOME

Here's all the skills you'll need to sign up a brand-new customer to our network.

### SKILLS CHECKLIST



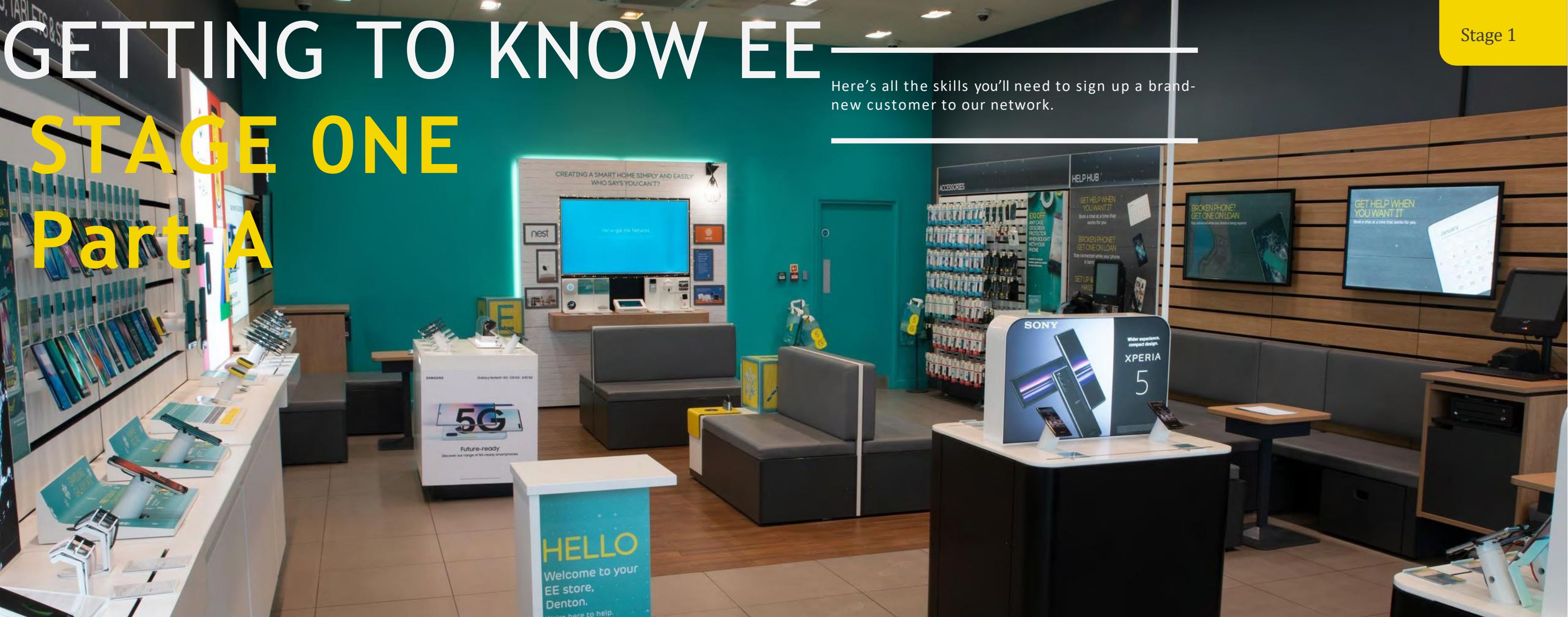
| Activity                        | Seen it | Done it | Mastered it |
|---------------------------------|---------|---------|-------------|
| Contracts & important Docs      |         |         |             |
| Bright HR Introduction/BLIP     |         |         |             |
| Health and Safety               |         |         |             |
| Timekeeping/Breaks              |         |         |             |
| Store Introductions             |         |         |             |
| Company Hierarchy               |         |         |             |
| Company Culture and Values      |         |         |             |
| Explaining the learning Journey |         |         |             |
| End of day recap                |         |         |             |

# GETTING TO KNOW EE

## STAGE ONE

### Part A

Here's all the skills you'll need to sign up a brand-new customer to our network.



## SKILLS CHECKLIST



| Activity                                       | Seen it | Done it | Mastered it |
|------------------------------------------------|---------|---------|-------------|
| Description of EE and Family Connect           |         |         |             |
| R.E.T.A.I.L                                    |         |         |             |
| Mystery Shop/Personal Conversations/Deal sheet |         |         |             |
| Killer Questions                               |         |         |             |
| NPS                                            |         |         |             |
| Digital Academy                                |         |         |             |
| Shadowing Colleague                            |         |         |             |
| End of week Recap                              |         |         |             |



Have you got the right customer? Here's where you'll find out.

# SKILLS CHECKLIST

| Activity                       | Seen it | Done it | Mastered it |
|--------------------------------|---------|---------|-------------|
| The Office (Simplify)          |         |         |             |
| Workplace/Work chat            |         |         |             |
| Email                          |         |         |             |
| SharePoint/PowerApps           |         |         |             |
| Albert                         |         |         |             |
| Family Connect Portal          |         |         |             |
| Greet Me                       |         |         |             |
| Advisor Hub                    |         |         |             |
| Compass +                      |         |         |             |
| Luminate (EIV) (TMB02)         |         |         |             |
| Domino                         |         |         |             |
| Excalibur (Retail/Lite/Hybrid) |         |         |             |
| Orbit                          |         |         |             |
| EPOS                           |         |         |             |

| Activity                  | Seen it | Done it | Mastered it |
|---------------------------|---------|---------|-------------|
| Globalcare                |         |         |             |
| Recycle and Reward        |         |         |             |
| Retail insight Tool       |         |         |             |
| PriceBook (Excel Version) |         |         |             |
| POS Shop                  |         |         |             |
| Consumer Incentives       |         |         |             |
| Service Enablers          |         |         |             |
| Ewebpass                  |         |         |             |
| Trade Pack- Price Book    |         |         |             |
| Pronto                    |         |         |             |



When your customers need help we'll be there with these skills.

# SERVICE TRANSACTIONS

## SKILLS CHECKLIST

| Activity                             | Progress |         |             |
|--------------------------------------|----------|---------|-------------|
|                                      | Seen it  | Done it | Mastered it |
| Sim Replacement – Excalibur Web Lite |          |         |             |
| Name Change – Excalibur Web Lite     |          |         |             |
| Address Change – Excalibur Web Lite  |          |         |             |

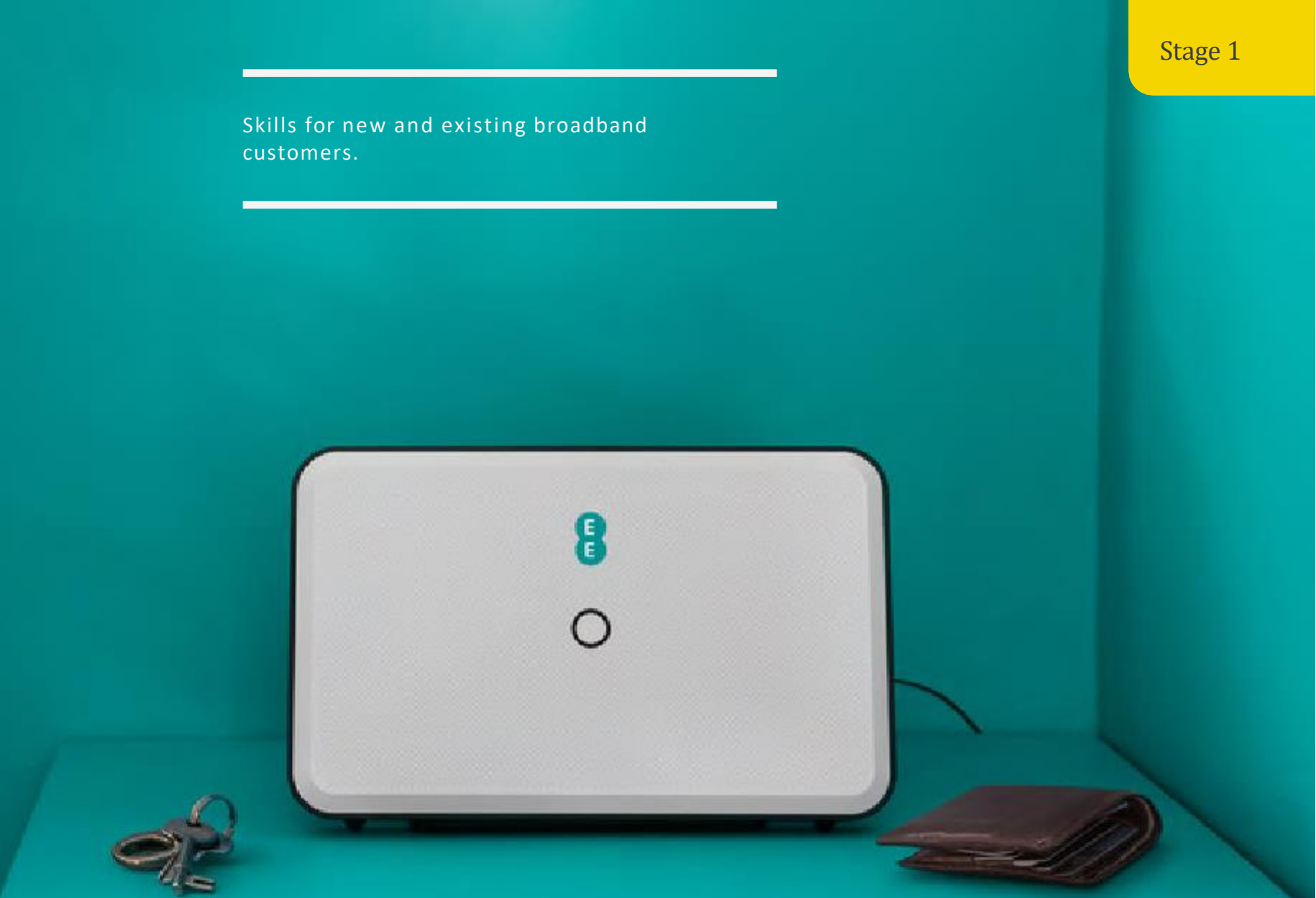
| Activity                            | Seen it | Done it | Mastered it |
|-------------------------------------|---------|---------|-------------|
| Checking an EE Bill - Excalibur Web |         |         |             |
| Checking an EE Bill – EE APP        |         |         |             |
| My EE Admin                         |         |         |             |
| Pay an EE Bill                      |         |         |             |
| How to add user on account          |         |         |             |
|                                     |         |         |             |

# HBB

## STAGE ONE

### Part B

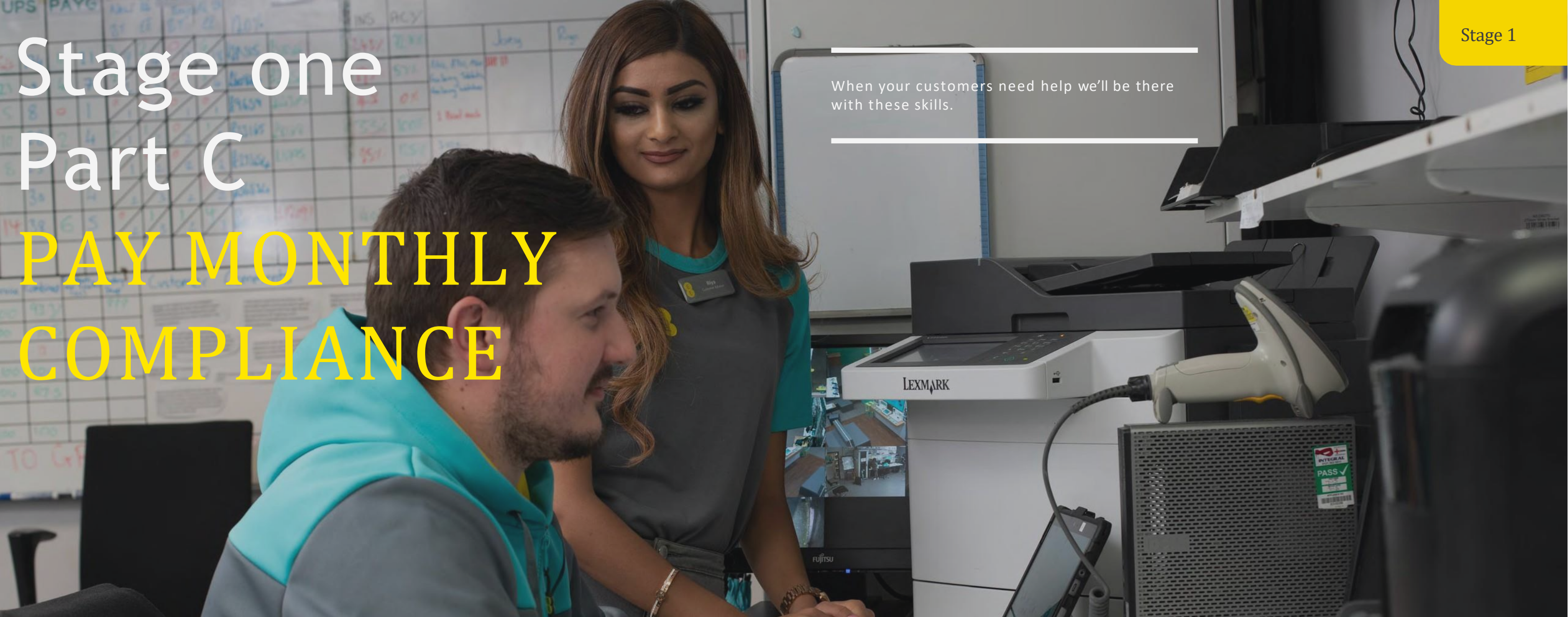
Skills for new and existing broadband customers.



## SKILLS CHECKLIST

| Activity                  |         |         |             |
|---------------------------|---------|---------|-------------|
|                           | Seen it | Done it | Mastered it |
| MAP EE                    |         |         |             |
| Types of HBB              |         |         |             |
| EE Home Broadband new     |         |         |             |
| EE Home Broadband regrade |         |         |             |
| BT Home Broadband new     |         |         |             |
| BT Home Broadband regrade |         |         |             |

| Activity                                     | Seen it | Done it | Mastered it |
|----------------------------------------------|---------|---------|-------------|
| EE HBB and EETV                              |         |         |             |
| BT HBB and BTTV                              |         |         |             |
| BT SME HBB                                   |         |         |             |
| BT to EE Broadband regrade                   |         |         |             |
| Customer Overview                            |         |         |             |
| Checking a BT/EE Bill –Sales and Service Hub |         |         |             |
| Notepad an account –Sales and Service Hub    |         |         |             |



When your customers need help we'll be there with these skills.

# Stage one

## Part C

### PAY MONTHLY COMPLIANCE

## SKILLS CHECKLIST



| Activity                         | Seen it | Done it | Mastered it |
|----------------------------------|---------|---------|-------------|
| Proof Appendix                   |         |         |             |
| Handset Tiers                    |         |         |             |
| Mandatory OFCOM Regulations      |         |         |             |
| Annual Price Increase            |         |         |             |
| Spend Cap                        |         |         |             |
| Porting Regulations              |         |         |             |
| Complete an EIV                  |         |         |             |
| Complete a One Time Pin          |         |         |             |
| Business Compliance              |         |         |             |
| Complete a ID SCAN               |         |         |             |
| Family Connect Portal Compliance |         |         |             |

# Stage One

## Part D

### EXISTING CUSTOMERS AND UPGRADES

If your customer is already with us here's some of the tools you'll use.

## SKILLS CHECKLIST

|                    | ○       | ○○      | ○○○         |
|--------------------|---------|---------|-------------|
| Activity           | Seen it | Done it | Mastered it |
| Add Line handset   |         |         |             |
| Add Line SIM only  |         |         |             |
| Add Line tablet    |         |         |             |
| Add Line watch     |         |         |             |
| Add Line MBB       |         |         |             |
| Gaming/Add to plan |         |         |             |

| Activity                         | Seen it | Done it | Mastered it |
|----------------------------------|---------|---------|-------------|
| Building a deal in Compass +     |         |         |             |
| Upgrade to handset               |         |         |             |
| Upgrade to SIM only              |         |         |             |
| Early upgrade paid               |         |         |             |
| Early upgrade free               |         |         |             |
| Eraly Upgrade (90) Days          |         |         |             |
| Upgrade Anytime with trade-in    |         |         |             |
| Upgrade Anytime without trade-in |         |         |             |
| Upgrade to Flex Pay              |         |         |             |

# Stage two

## Part A

### NEW CONNECTIONS

Here's all the skills you'll need to sign up a brand-new customer to our network.



## SKILLS CHECKLIST



| Activity                              | Seen it | Done it | Mastered it |
|---------------------------------------|---------|---------|-------------|
| New PAYM handset                      |         |         |             |
| New PAYM SIM only                     |         |         |             |
| New pre-to-post                       |         |         |             |
| New P2P (Addline-Watches-Tablets-MBB) |         |         |             |
| Flex (Coming soon)                    |         |         |             |

# Stage Two

## Part B

### BUSINESS

Here's what you'll use to help business customers.

## SKILLS CHECKLIST



| Activity                              | Seen it | Done it | Mastered it |
|---------------------------------------|---------|---------|-------------|
| New SME sale                          |         |         |             |
| SME HBB                               |         |         |             |
| Type of business Eg. LTd- Sole Trader |         |         |             |
| Business First                        |         |         |             |

# StageTwo

## Part C

### REPAIRS

Sometimes things go wrong with customers phones. You can get it fixed and here's how to do that.

Stage 2



## SKILLS CHECKLIST



| Activity                                 | Seen it | Done it | Mastered it |
|------------------------------------------|---------|---------|-------------|
| Book a handset for Repair – Global Care  |         |         |             |
| Return handset from Repair – Global Care |         |         |             |

# Stage Two

## Part D

### PRE-PAY



Have you got a Pay As You Go customer? Here's what you do.

## SKILLS CHECKLIST



| Activity          | Seen it | Done it | Mastered it |
|-------------------|---------|---------|-------------|
| PAYG SIM sale     |         |         |             |
| PAYG handset sale |         |         |             |
| PAYG UPG sale     |         |         |             |
| How to Top up     |         |         |             |

# Stage Three

## Part A

### EXCALIBUR

Everything in between.



## SKILLS CHECKLIST

| Activity                          | Progress |         |             |
|-----------------------------------|----------|---------|-------------|
|                                   | Seen it  | Done it | Mastered it |
| Add to plan                       |          |         |             |
| Upgrade in Excalibur Lite (POBO)  |          |         |             |
| Add line in Excalibur Lite (POBO) |          |         |             |
| New sale in Excalibur Lite (POBO) |          |         |             |
| Stage 2 Process                   |          |         |             |

| Activity                           | Seen it | Done it | Mastered it |
|------------------------------------|---------|---------|-------------|
| Notepad an account – Excalibur Web |         |         |             |
| Notepad an account – Advisor Hub   |         |         |             |
| PAC Codes                          |         |         |             |
| Referrals                          |         |         |             |

# Stage Three

## Part B

# PRODUCT KNOWLEDGE

Knowledge is power. Here you can find all the information you could possibly need.

## SKILLS CHECKLIST



| Activity                        | Seen it | Done it | Mastered it |
|---------------------------------|---------|---------|-------------|
| Access Device Comparison        |         |         |             |
| Access Competitor Portal        |         |         |             |
| Check the stock guidance report |         |         |             |
| Retail Trade Pack               |         |         |             |
| Retail/Franchise Wrap           |         |         |             |
| Handset Product Knowledge       |         |         |             |

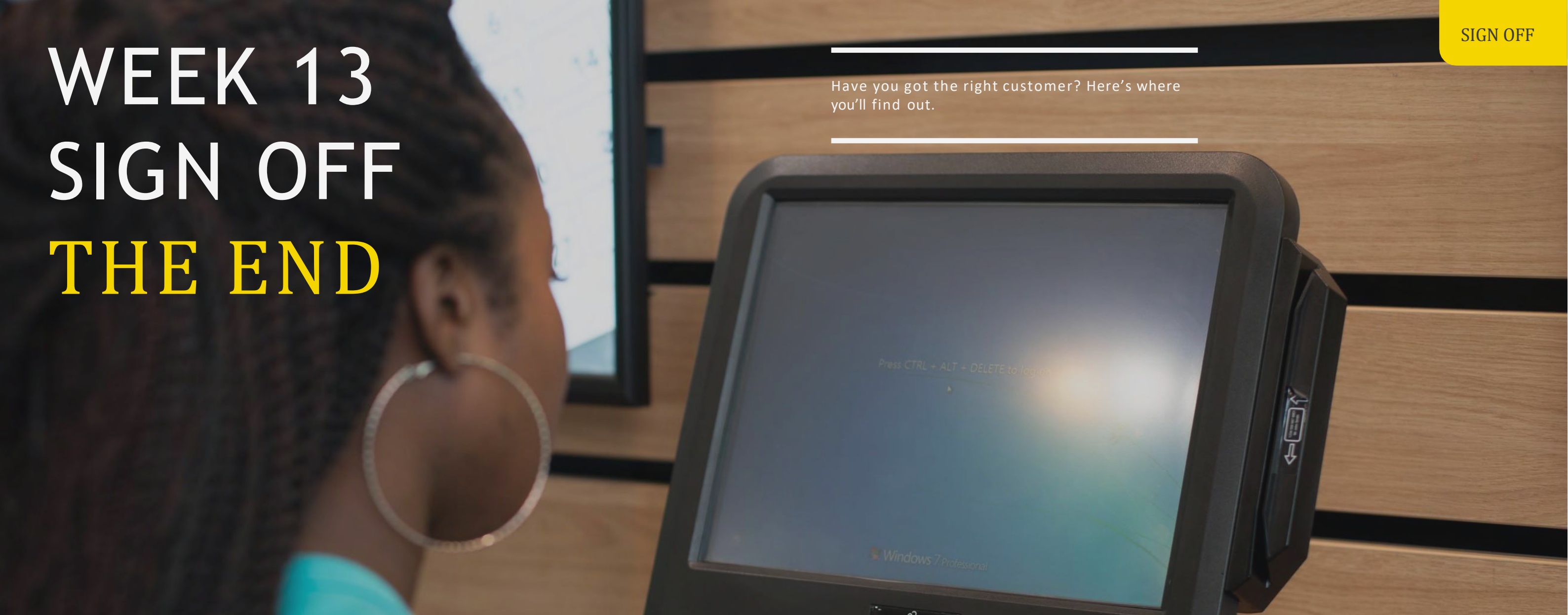
# WEEK 13

# SIGN OFF

# THE END

SIGN OFF

Have you got the right customer? Here's where you'll find out.



## SKILLS

## CHECKLIST



| Activity            | Seen it | Done it | Mastered it |
|---------------------|---------|---------|-------------|
| Commission          |         |         |             |
| Target              |         |         |             |
| General Recap       |         |         |             |
| Compliance sign off |         |         |             |

# Certificate of Achievement

This certificate is proudly awarded to

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*In recognition of your exceptional performance during your training and Probationary period. Congratulations on your well deserved success.*

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REGIONAL  
MANAGER



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STORE  
MANAGER



You've reached the end of your Welcome journey - congratulations!

Today is about reflecting on your journey so far, the highlights and challenges, and give it your all to fill in those knowledge gaps. Don't forget: learning never ends, and the knowledge and skills you need are waiting here when you need them.

**Best of luck- Go smash it!**

