Post-Training Recap: Log a Phone Call

Talisma: How to Log a Phone Call eLearning

- Explained Talisma functionality, including:
    - How to use Control-E to create a new interaction in Talisma
    - Why a Hyphen is used in the Subject field in a new interaction
    - How and when to use the Resolve button to resolve an interaction
    - How to refresh the Talisma workspace screen
        - Press F5 on the keyboard
        - Click the Refresh button

These functions are also covered in the **"How to Log an Interview"** eLearning

- Introduced and simulated three different scenarios where a call interaction might need to be created; When the representative called a prospective student and:
    - A message was left for the prospective student
    (Phone Call-Recruiting: Left Message) – Resolve
    - There was no answer on the prospective student's phone
    (Phone Call-Recruiting: No Answer) – Resolve
    - Contact was made with the prospective student, but they were not interested in the school
    (Phone Call-Recruiting: Contacted) – Resolve
        - In this scenario, also showed how to update lead properties (specifically updating Lead State and Not Interested Reason Codes) when the prospective student is not interested
        ** Other Lead State options are available for Contacted
        ("Not Interested" is only one example)*

- Also showed functionality for how to:
    - Use the User Message field to enter messages/comments about the interaction being created
    - Use the Log and Close button to save a new interaction
    - Populate the Interaction Classification and Interaction Result fields

Topic	Talking Points	Follow Up Activities

Types of Phone Call Interactions	• Discuss each of the following types of phone call interactions and provide an example of each:
	  o Left Message
	  o No Answer
	  o Contacted (Not Interested)
	
	Note: Other Lead State options are available for Contacted. "Not Interested" is only one example.
		• Reference "Log a Phone Call in Talisma" **Screencasts** to review the simulations provided in the eLearning
		  o Phone Call-Recruiting: Left Message
		  o Phone Call-Recruiting: No Answer
		  o Phone Call-Recruiting: Contacted (Not Interested)
		
		• Reference "Log a Phone Call in Talisma" **Job Aids** to reinforce the steps taken in the simulations provided in the eLearning
		  o Phone Call-Recruiting: Left Message
		  o Phone Call-Recruiting: No Answer
		  o Phone Call-Recruiting: Contacted (Not Interested)

Talisma Functionality Used to Create Phone Call Interactions	Define each of the six functions below. How do you use the following functionality in Talisma? • Control-E (Create New Interaction) • Hyphen in Subject field • Resolving/not resolving interactions • F5 or Refresh button • Log and Close button • User Message field	• Refer to the **Talisma Manual** for a list of buttons and shortcuts available in Talisma. • During a team meeting, have the reps take turns explaining what they know about each functionality that was mentioned in the eLearning (see list to the left). Each representative can explain one function (have the reps get into groups if the campus is large).
Interaction Classification and Interaction Result	• What is an Interaction Classification? ==*The type of interaction*== • What is an Interaction Result? ==*The outcome of the interaction*==	• During a team meeting, have the representatives come up with real life examples of No Answer, Contacted, and Left Message. • Complete the Interaction Classification and Interaction Result Activity below.

Activity: Phone Call Interactions

1. **Read through each scenario below and determine what the Interaction Classification and Interaction Result should be:**

    A. You called Bob, but his voicemail was full:

    Interaction Classification: _____

    Interaction Result: _____

    B. You called Tim but he said he decided to go to his community college instead of your school:

    Interaction Classification: _____

    Interaction Result: _____

    Bonus - Which Lead Properties would you update? _____

    C. You called Tracy, and left her a voicemail message:

    Interaction Classification: _____

    Interaction Result: _____

2. **You called Fred and left him a message on his voicemail. Now it's time to log this in Talisma. Determine which of the two answers is correct for each step. Circle the correct answer.**

    A. Create a new interaction by pressing *(Control-E, F5)* on the keyboard

    B. Enter *(- , Phone Call)* into the Subject field

    C. Type "Left message for Fred" in the *(User Message, Contact Message)* field.

    D. You *(would, would not)* click the Resolve button to resolve the interaction

    E. Click *(Classify, Log and Close)* to be prompted for the Interaction Classification

    F. Select *(Phone Call-Recruiting, Follow-Up Phone Call)* from the Interaction Classification drop down, then click OK

    G. Select *(No Answer, Left Message)* from the Interaction Result drop down, then click OK

Activity: Phone Call Interactions (Answer Key)

1. **Read through each scenario below and determine what the Interaction Classification and Interaction Result should be:**

    A. You called Bob, but his voicemail was full:

       Interaction Classification: *(Phone Call-Recruiting)*

       Interaction Result: *(No Answer)*

    B. You called Tim but he said he decided to go to his community college instead of your school:

       Interaction Classification: *(Phone Call-Recruiting)*

       Interaction Result: *(Contacted)*

       Bonus - Which Lead Properties would you update? *(Lead State="Not Interested", Not Interested Reason Codes="Other Career Interests")*

    C. You called Tracy, and left her a voicemail message:

       Interaction Classification: *(Phone Call-Recruiting)*

       Interaction Result: *(Left Message)*

2. **You called Fred and left him a message on his voicemail. Now it's time to log this in Talisma. Determine which of the two answers is correct for each step. Circle the correct answer.**

    A. Create a new interaction by pressing *(**Control-E**, Insert > New)* on the keyboard

    B. Enter *(**-** , Phone Call)* into the Subject field

    C. Type "Left message for Fred" in the *(**User Message**, Phone Message)* field.

    D. You *(**would**, would not)* click the Resolve button to resolve the interaction

    E. Click *(Classify, **Log and Close**)* to be prompted for the Interaction Classification

    F. Select *(**Phone Call-Recruiting**, Follow-Up Phone Call)* from the Interaction Classification drop down, then click OK

    G. Select *(No Answer, **Left Message**)* from the Interaction Result drop down, then click OK