

# Puzzel Training Academy Brochure

Dedicated training for  
contact centre professionals



**puzzel.**



"I like that it was interactive, we built call flows as we went through the training. Really engaging."



"As training goes this was the one of the best, exactly what we were looking for."



"What an amazing training session! I have learnt so much and I feel like I can now use the software with confidence."



"My team's praise was glowing. They said the training was delivered in the perfect style with lots of relatable contextual examples to give the activities substance."

enjoyable relevant  
structured fun interactive entertaining  
super-good engaging flowed  
tailored awesome  
friendly knowledgeable contextual  
professional activities



"The scenario build at the end of the course was fun and challenging. Discussing our challenges and questions along the way helped with understanding the material."



"Very enjoyable and relaxed. Easy to understand - a great learning experience."



"The support material you've provided is great and will become our bible!"



"I really felt that I was seen and heard in the session, and it made me really comfortable. Thank you for that!"



"It was a good review with a focus on the right things. It is good that you have a lot of time during the training."



"Great training session, great trainer, happy with the introduction to the new platform."



"I liked the way the trainer demonstrated the different possibilities in the program and demonstrated it into something relevant for our company."



"The way the trainer explained and made sure it fitted the needs of the entire group- excellent!"

# Staff training on a new product can sometimes be challenging for an organisation.

At Puzzel, we work with our clients to ensure that this is seamless, and their launch day becomes one of celebration, excitement, and success!

Our delivery is bespoke and packed with practical and hands-on training, using your real-world scenarios to fully embed the product with your teams and experience first-hand the functionality it offers so they can then swiftly transfer their learning into their workplace.



# Feeling part of a project is empowering

it gives your teams a wish for it to succeed and our Puzzel training does just that.

## Our training

- ✓ Is delivered by knowledgeable, friendly, experienced trainers
- ✓ Allows your staff to practice in a safe environment
- ✓ Delivers fast software training
- ✓ Shares best practice and encourages discussion
- ✓ Includes live demonstrations of your Puzzel solution
- ✓ Provides focused, immersive learning moments
- ✓ Is tailored to your unique Puzzel package
- ✓ Provides post course self-directed learning to grow skills further

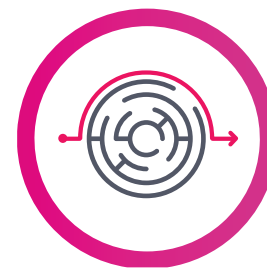
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# Our training selection is endless and covers all packages.

The brochure represents our core training courses. Please speak to your project manager for guidance.

## CONTACT CENTRE PACKAGES



Resolve



Impress



Power

## DIGITAL FIRST PACKAGES



Discover



Embrace

**puzzle.**



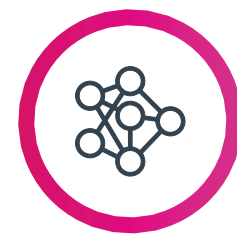
# How do you want yours delivered?

There's no one-size-fits-all approach to this, since every set of learners is different. Of course, the big question is: Face-to-face or online?



## Face to face

One big factor with F2F will be geography. All on 1 site then classroom training might be for you.



## Blended approach

All our training modes benefit from Puzzle Academy post course resources which gives an extra blended learning solution via videos and our help portal.



## Digital learning

If you have several offices, training through MS teams will be the best option, and our top selection with our customers. This session is recorded, has huge group interaction and provides great instruction in a safe environment.



## Site support on Go Live day

Floor Walking is a very popular selection for a go live day. Our Trainers will be on site and literally "Walk the Floor" responding to individual queries, issues and Puzzle related questions.

### Benefits include:

- Encouragement, as employees receive dedicated 1-2-1 support
- Real time problem solving, as it's now truly bespoke and part of the client's process
- Confidence booster, as experts are on hand to support them to self-sufficiency.

## Still Undecided?

At the Academy we strive to build relationships with our clients through exceptional training, making us their first choice for training their staff on our products due to our interaction, experience and knowledge.

If you wish to connect to some of our happy customers, please speak to our Training Director for more details.



# Contact Centre

Training solutions to fit your package and meet your needs



## Voice

Handle inbound calls with Softphone, IVR, Switchboard, Voice Recording, Silent Monitoring and more.

## Email

Respond to emails fast with automatic routing, queuing and prioritisation.

## Web Chat

Offer your customers live, convenient support as they browse your website.

## Social

Impress influencers and build loyal followers on Facebook, Twitter and Trustpilot.

## SMS

Deliver personalised service, surveys and campaigns straight to your customers' mobile phones.

## Video

Video chat with customers and share screens for a more empathetic and intuitive customer experience.

# Agent Application Training

## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Sign in and demonstrate how to log in and log out of different profiles
- ✓ Demonstrate how to receive and make a call through the application
- ✓ Understand how to forward a call
- ✓ Practice how to receive and respond to written requests
- ✓ Identify different tabs and build a dashboard with relevant tabs
- ✓ Learn how to receive a webchat and interact with a customer
- ✓ Recognise the different tabs in Agent Assist

Agents will learn top tips from our experienced trainer on how to build their skills, get the most out of your platform, and reach your organisation's full potential.

## TARGET AUDIENCE

Contact centre agents and other Agent Application users

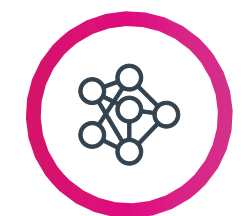
## OVERVIEW

This course equips agents with the knowledge and skills they need to become confident users of Puzzel's Agent Application. Participants will explore the key features of the platform and learn how these can support them in their role, with demonstrations and activities throughout.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



1.5 hours

## GROUP SIZE



1-15



\* Training will vary and dependent on package purchased



# Agent Case Management Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Demonstrate how to use and navigate the Puzzel Case Management (Ticketing) platform
- ✓ Manage a personal address book and understand how to store and edit contacts
- ✓ Forward tickets to other agents
- ✓ Add attachments and attributes to agents
- ✓ Demonstrate functionality of the platform

Agents will develop their ticketing skills through group activities and real-life scenarios led by our experienced trainer.

## TARGET AUDIENCE

Contact centre agents or staff handling tickets through the Puzzel Case Management platform

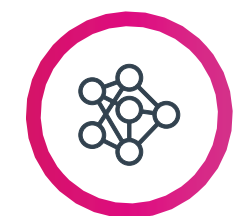
## OVERVIEW

This course provides agents with the practical knowledge they need to successfully use Puzzel's Case Management platform. Participants will learn how to manage tickets, reply, forward, search, add notes attributes and attachments, utilise their address book and dashboard. This training includes a blend of comprehension, analytical study, and hands-on experience.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



2.5 hours

## GROUP SIZE



1-15

\* Training will vary and dependent on package purchased

# Agent Dialler\*

## Training



### OBJECTIVES

By the end of the session attendees will be able to:

#### AGENT

- ✓ Recognise the different functions of the Dialler area of the platform
- ✓ Discuss and recall the differences between a standard call and a dialler call
- ✓ Execute a call end to end including the “Enquiry registration”

#### ADMIN

- ✓ Apply the settings needed to set up a new campaign
- ✓ Differentiate between new and existing campaigns
- ✓ Execute a call end to end including the “Enquiry registration”

This session starts off with a tour from the Agents perspective exploring the modes and functionality of this great tool. Part two gives your learners key insights into building a campaign as they critique the approach step by step

### TARGET AUDIENCE

This training is split into 2 concurrent sessions. First part- Contact Centre agents and other users. Second part- Team leaders, supervisors, managers and administrators

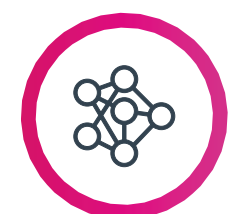
### OVERVIEW

This course provides you with the practical knowledge of this highly versatile automated outbound call system. The session walks through a variety of campaign modes including preview, progressive, power or predictive, demonstrates the uploading of campaign calls lists, analyses the call blending to combine inbound and outbound calls in a seamless manner. Demonstrations and activities take place throughout the session.

### DELIVERY OPTIONS



Face to face



Blended Approach

### DURATION



2 hours

### GROUP SIZE



1-15

\* Training will vary and dependent on package purchased

Please refer to target audience as this course is split into 2 concurrent sessions focusing on both agent and admin

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# Admin Portal Training

## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Set up skills, queues and display queue settings
- ✓ Demonstrate how to set up users, user groups and profile templates
- ✓ Edit time and audio modules
- ✓ Configure and manage access control
- ✓ Navigate the core tabs within the platform
- ✓ Create and run basic reports
- ✓ Demonstrate the ability to use the features within the services tabs
- ✓ Create and modify dashboards to provide a holistic view of current performance

\* Training will vary and dependent on package purchased

Our step-by-step programme will teach managers how to administer their PCC solution, understand the key features, and use our resource pack to test their knowledge as they go.

## TARGET AUDIENCE

Team leaders, supervisors, managers, administrators and engineers

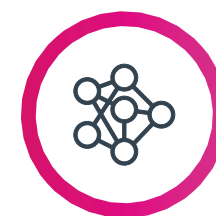
## OVERVIEW

This course provides contact centre leaders with the theoretical and practical knowledge they need to successfully manage and configure the Puzzel Admin Portal. Participants will explore the key features of the portal, including queues, wallboards and tickers and learn how these can support them in their role.

## DELIVERY OPTIONS



Face to face



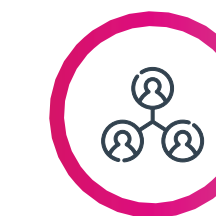
Blended Approach

## DURATION



1 day

## GROUP SIZE



1-8



# Admin Knowledgebase Training

## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Recognize the key features of knowledgebase
- ✓ Locate the knowledgebase Dashboard
- ✓ Create, edit and delete articles
- ✓ Label and categorize the articles
- ✓ Execute publishing and unpublishing articles
- ✓ Experiment rating the articles

Our session swaps hints and tips so that the learners take away ideas on how to build up their Knowledgebase into a great resource that can be used by their teams.

## TARGET AUDIENCE

Team leaders, supervisors, managers and administrators of the Admin Portal

## OVERVIEW

This course provides you with the practical knowledge and skills you need to confidentially use the Knowledgebase area of the platform. You will explore how to create and edit articles for your platform, how to categorize them into different areas and sort and filter your information so that it becomes a great resource area for your teams.

Demonstrations and activities are throughout the session.

## DELIVERY OPTIONS



Face to face



Blended Approach



2 hours



1-8



\* Training will vary and dependent on package purchased

# Admin Case Management Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Demonstrate how to use and navigate the Puzzel Case Management (Ticketing) platform
- ✓ Manage system permissions
- ✓ Demonstrate channel management
- ✓ Allocate tickets to other agents
- ✓ Understand how to work with GDPR requirements
- ✓ Demonstrate ticket management
- ✓ Organise working hour schedules

Managers will explore Puzzel's Case Management platform and learn how to achieve and maintain a great team set-up for your organisation.

## TARGET AUDIENCE

Team leaders, supervisors, managers and administrators

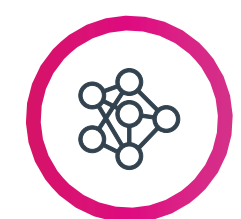
## OVERVIEW

This course provides administrators with the skills they need to manage and maintain their Puzzel Case Management system. Participants will learn how to get around the platform, explore and understand all the key areas including General System Settings, Channel Settings, Working Hours, Teams, Production Rules, User Settings, System and Team Roles, Dashboard, Categories and Forms. Demonstrations and discussions take place throughout.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



1 day

## GROUP SIZE



1-8

\* Training will vary and dependent on package purchased

\* Timeframe also includes Agent Training

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# Admin Statistics Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Demonstrate how to download a standard report
- ✓ Understand the difference between the three tiers of reporting
- ✓ Run numerous standard reports
- ✓ Create a subscription report
- ✓ Create a custom report
- ✓ Generate automated reports for your teams

Our experienced trainer will guide you through Puzzel's reporting functionality, with expert tips tailored to your business.

## TARGET AUDIENCE

Team leaders, supervisors, managers and administrators

## OVERVIEW

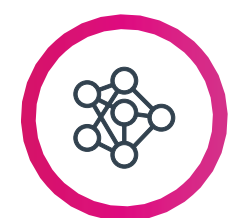
**PLEASE NOTE: This course can be tailored to cover either Puzzel Contact Centre or Puzzel Case Management.**

This course explores the different types of standard reports available in the Puzzel Customer Service Platform. Using their own portal, participants will learn the three tiers of reporting, as well as how to set reporting periods and subscriptions. Each person will take away a basic knowledge of creating both standard and customised reports and the ability to analyse their data.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



2 hours

## GROUP SIZE



1-8

\* Training will vary and dependent on package purchased

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# Adv Admin Call Flow Tool Training

## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Demonstrate comprehension of the Call Flow Tool (CFT)
- ✓ Identify all the CFT module types and what they are used for
- ✓ Build a basic map using standard and advanced modules
- ✓ Build a more advanced IVR utilising more of the available modules

Engineers will work with our experienced trainer to build and analyse a testing sandbox, enabling them to test and develop their skills without affecting your platform.

## TARGET AUDIENCE

Advanced administrators, engineers and those that program and manage the platform

## OVERVIEW

This course equips engineers and advanced administrators with the skills they need to build successful call flow maps using Puzzel's Call Flow Tool. Participants will learn how to build and edit basic maps, as well as analyse advanced Interactive Voice Response (IVR) systems. This training includes a blend of comprehension, analytical study, and hands-on experience.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



1 day

## GROUP SIZE



1-8



\* Training will vary and dependent on package purchased

# Train The Trainer Training

## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Demonstrate and practice how to deliver Agent Application Training
- ✓ Demonstrate how to log in and log out of different profiles
- ✓ Identify different tabs and build a dashboard with relevant tabs
- ✓ Understand and use supplied materials and resources
- ✓ Demonstrate how to answer and forward calls
- ✓ Practice how to receive and respond to written requests

Staff will learn how to successfully deliver training to other employees, with advice on listening, organisation, praise, delivery and feedback.

## TARGET AUDIENCE

Trainers and key staff training and mentoring staff day to day

## OVERVIEW

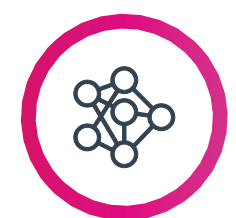
**PLEASE NOTE: This course can be tailored to cover either Puzzel Contact centre or Puzzel Case Management.**

This course will equip staff with the skills and knowledge they need to become clear and effective trainers. Participants will receive comprehensive training in Puzzel's Agent Application and learn how to use our supplied materials and resources to train other staff.

## DELIVERY OPTIONS



Face to face



Blended Approach



x3 2 hour sessions



1-8



\* Training will vary and dependent on package purchased

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# Partner Implementation Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Demonstrate a high level of comprehension and knowledge of the Puzzel Contact Centre
- ✓ Create a working solution based on a customer scenario
- ✓ Confidently present a solution design
- ✓ Create and test call flow routing
- ✓ Follow a standard process
- ✓ Complete handover documents

Our experienced trainer will help you become a Puzzel expert, with useful tips tailored to your business.

## TARGET AUDIENCE

Partners

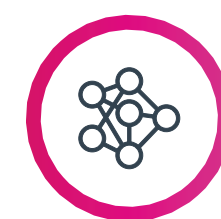
## OVERVIEW

This program equips engineers with the knowledge and skills they need to independently design, build, implement and support a new Puzzel instance. Participants will learn how to create a working solution that meets their client's needs, as well as Puzzel's best practices for testing and support. This training includes a blend of theory and hands-on experience.

## DELIVERY OPTIONS



Face to face



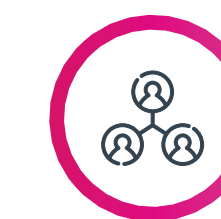
Blended Approach

## DURATION



4 days

## GROUP SIZE



1-5

\* Training will vary and dependent on package purchased

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# Partner Case Management Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Show an understanding of the Puzzel Case Management Agent, Admin & Reporting platform
- ✓ Execute and demonstrate understanding of specific areas of the platform through activities
- ✓ Show evidence of following the Case Management processes to evaluate, process and complete the ticket timeline
- ✓ Confidently move around the platform recognizing and understanding with confidence different controls
- ✓ Analyse and understand the learning resources created for the admin function
- ✓ Produce reports through activities in the 2 day session to complete a knowledge check and measure learning

Partners will learn tips to build their platforms in an impactful and seamless way.

## TARGET AUDIENCE

Partners

## OVERVIEW

This course provides you with the practical knowledge and skills you need to confidentially develop the skills of Partner engineers to a level in which you can design, build, implement and support a Case Management platform independently. While maintaining the use of best practices and standards developed by Puzzel.

Participants will explore the key areas of Case Management & Reporting to explore and recognise the key areas they need to analyse with their customers. Demonstrations and activities take place throughout the session.

## DELIVERY OPTIONS



Face to face



Blended Approach



2 days



1-8

\* Training will vary and dependent on package purchased

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# Digital Engagement

Training solutions to fit your package and meet your needs



**puzzle.**



# Agent Digital Engagement Live-share Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Reveal how to screen share and initiate a video feed with a customer
- ✓ Demonstrate the different ways to respond to customers using the Co-browse and Video Share functions
- ✓ Sign in and execute how to initiate Live Share with a customer via Chat and Voice
- ✓ Use the various collaboration tools and pre defined messages within the application to bring your conversation to greater heights
- ✓ Recognise the needs of the customer and be able to explain how to navigate the options on their side of the interaction

Agents will learn tips to build their skills and knowledge and interact with the customer in a seamless way.

## TARGET AUDIENCE

Contact Centre agents and other Digital Engagement users.

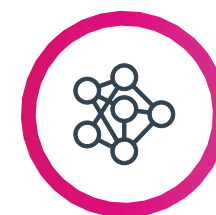
## OVERVIEW

This course provides you with the practical knowledge and skills you need to confidentially use the Digital Engagement area of the platform. Participants will explore the key areas of Live-share, and learn how to be intuitive and engaging when they are interacting with their customers. Demonstrations and activities take place throughout the session.

## DELIVERY OPTIONS



Face to face



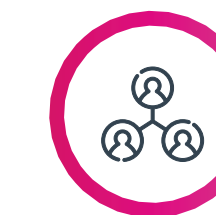
Blended Approach

## DURATION



1 hour

## GROUP SIZE



1-15

# Admin Digital Engagement System Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Interpret the customer journey
- ✓ Discuss with others the different types of users and how this works in your organisation
- ✓ Recognise the steps to add and delete new users to your platform
- ✓ Gain an insight into the different tabs, links and videos to help your knowledge and understanding grow
- ✓ Explore the basics of the engagement process
- ✓ Examine the different types of canned responses
- ✓ Identify the different areas within User Settings
- ✓ Gain insights on how to run various reports to track their organisational KPI's

Administrators and managers will explore the DE Admin portal and acquire advice and ideas to achieve and maintain a great team set-up for your organisation.

## TARGET AUDIENCE

Team leaders, supervisors, managers and administrators of the Admin Portal

## OVERVIEW

This course provides you with the practical knowledge and skills you need to confidentially navigate around the Digital Engagement Admin Portal. It will explore the different tabs within the portal and give hints and tips to a successful set up. Demonstrations and activities are throughout the session.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



2 hours

## GROUP SIZE



1-8

# Adv Admin Digital Engagement System Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Interpret the customer journey
- ✓ Understand how to modify operating hours
- ✓ Modify a signature or welcome message
- ✓ Adding Groups/Skills
- ✓ Setting Up a new user recap
- ✓ Building Templates
- ✓ Making a new banner or amending an existing one
- ✓ Creating a new opportunity in a group
- ✓ Saving and publishing your configuration recap

Administrators will explore the DE Admin Portal and acquire advice and ideas to achieve and maintain a great team set-up for your organisation.

## TARGET AUDIENCE

Engineers and administrators

## OVERVIEW

This course provides you with the practical knowledge and skills you need to confidentially navigate around the Digital Engagement Admin Portal. It will explore the different tabs within the portal and give hints and tips to a successful set up to those with full admin access and administration rights to the Digital Engagement Admin Platform. This will cover areas such as creating or updating banners, designing templates, creating opportunities and saving changes to the platform and publishing them to your customers.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



2 hours

## GROUP SIZE



1-8

\* Training will vary and dependent on package purchased

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# Smart Chatbot Digital Engagement Training



## OBJECTIVES

By the end of the session attendees will be able to:

- ✓ Navigate the Digital Engagement platform
- ✓ Have a basic understanding of NLU
- ✓ Know how to create new intents in the Chatbot
- ✓ Explore and then practice how to build a workflow
- ✓ Clarify how a workflow links to an Intent
- ✓ Discuss the importance of different response choices within the Smart Chatbot
- ✓ Test different responses within their Chatbot by using the 'Test Intents' feature
- ✓ Experiment with the 'Pre go-live' feature
- ✓ Summarize on how to save and publish their configuration on their Smart Chatbot
- ✓ Diagnose how to troubleshoot their solution

Engineers will delve deep into building and maintaining a Smart Chatbot. They will explore the steps to create Chatbot workflows, testing as they go, analysing key words and phrases, creating ideas to achieve successful outcomes and workflows to maintain a great set-up for your organisation.

## TARGET AUDIENCE

Engineers and developers

**PLEASE NOTE:** This session is solely aimed at those who are building and maintaining the Bot on an ongoing basis

## OVERVIEW

This course provides you with the practical knowledge and skills you need to confidentially build and maintain a Smart Chatbot. Through an ongoing scenario the learners will grow their skills as they navigate through the steps to create a successful Chatbot, fault finding as they progress. There were be an initial workshop where they will work as a team to explore the steps to success and to implement them, followed by a 1.5 days of training to give you the practical skills on how the Smart Chatbot could be adapted or improved. Demonstrations and activities take place throughout the 2 day session.

## DELIVERY OPTIONS



Face to face



Blended Approach

## DURATION



2 days

## GROUP SIZE



1-4

\* Training will vary and dependent on package purchased

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Become a master of your solution

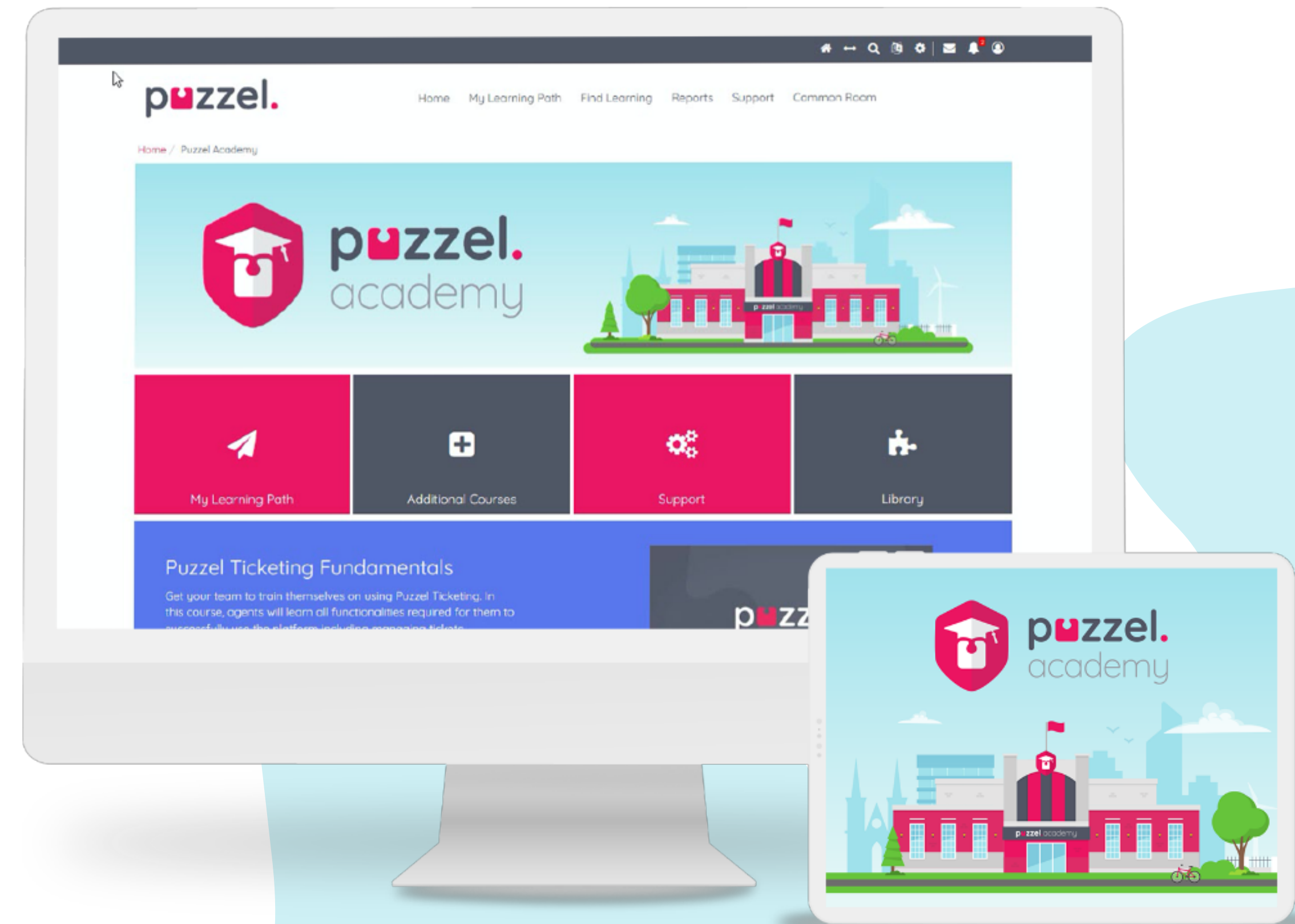
# Enrol in our Puzzle Academy

The Puzzle Academy is our online learning management system designed for busy contact centres.

Accessible anywhere, anytime, and on any device, it's packed full of interactive courses, activities and downloadable resources to help you onboard and up-skill your team.

You can follow a structured learning path or dip-in as required to our impressive library of tuition videos and learning modules. Managers can also track the progress of their teams with insights into which courses they've completed and where any knowledge gaps may lie.

With a personalised dashboard and training plan, you'll be achieving top grades in no time!



[➤ Enrol today](#)



# The expert in anything was once a beginner!

**Helen Hayes** (Emmy, Grammy, Oscar and Tony Award winner)

[▶ Get in touch](#)

**puzzlel.**  
When every moment matters