Welcome To ICMI's Online Training Pass QuickStart Guide

We are so glad you have decided to use ICMI's Online Training Pass to meet the training needs of your contact center. To help you make the most of the product, this document provides some helpful information to get you started. For information on accessing reports, please see separate documentation on the Training Dashboard.

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with links to move quickly to the information you need

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What You Need to Know to Get Started
Via email, you should have received an organizational access code. Everyone who accesses the Online Training Pass will need this code the first time they log in.

Accessing the Online Training Pass
1. Using any web browser, go to onlinetraining.icmi.com.

NOTE: If you are already logged into icmi.com, you will not see this screen.

2. If you already have an icmi.com account, use that login to enter the Online Training Pass. If you do not already have an icmi.com account, click on Register Account to set one up.

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Sign Up for a User Account

First Name:

Last Name:

Email:

Password:

Confirm Password:

Security Question:

Security Answer:

Create Account   Login

All fields must be filled in to create an account.

Click on Create Account to create your account.

If you signed up for a new account, the next screen you will see is this one:

Thank you for visiting ICMI's Online Training Pass for Contact Centers! Keep your eyes out for new content being added throughout the year. Our newest agent training features blended learning – modular e-learning, exercises, quizzes and facilitator's guides – to enhance retention and accessibility in the busy contact center environment.

IMPORTANT NOTE: In order to enable robust reporting for Administrators of the Online Training Pass – including detailed activity on individual users within your company – we require users to be logged into an ICMI.com account. The collected information is for the sole use of your company, and will not be used by ICMI for any purpose other than providing your Administrator with progress reports. If you do not already have an icmi.com account, you can create an account directly on this page by clicking "Register Account" below.

Account Sign Up Complete

You have successfully created an ICMI.com account. You may now view your OnDemand courses.

View Courses

icmi   800 672 6177 | icmi@icmi.com
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If you logged in with an icmi.com account or after you click View Courses from the Account Sign Up Complete page, you will next be prompted to enter your company's Access code.

3. Click on View Courses and you will be prompted for your company's Access code:

Please submit your company access code when prompted. If you do not have an access code, contact your company administrator.

We hope you enjoy your ICMI Training experience. If you have any questions, please feel free to contact us at icmi@icmi.com or 800.672.6177.

NOTE: You should only need the Access code the first time you log into the Online Training Pass.

Access code:

Continue

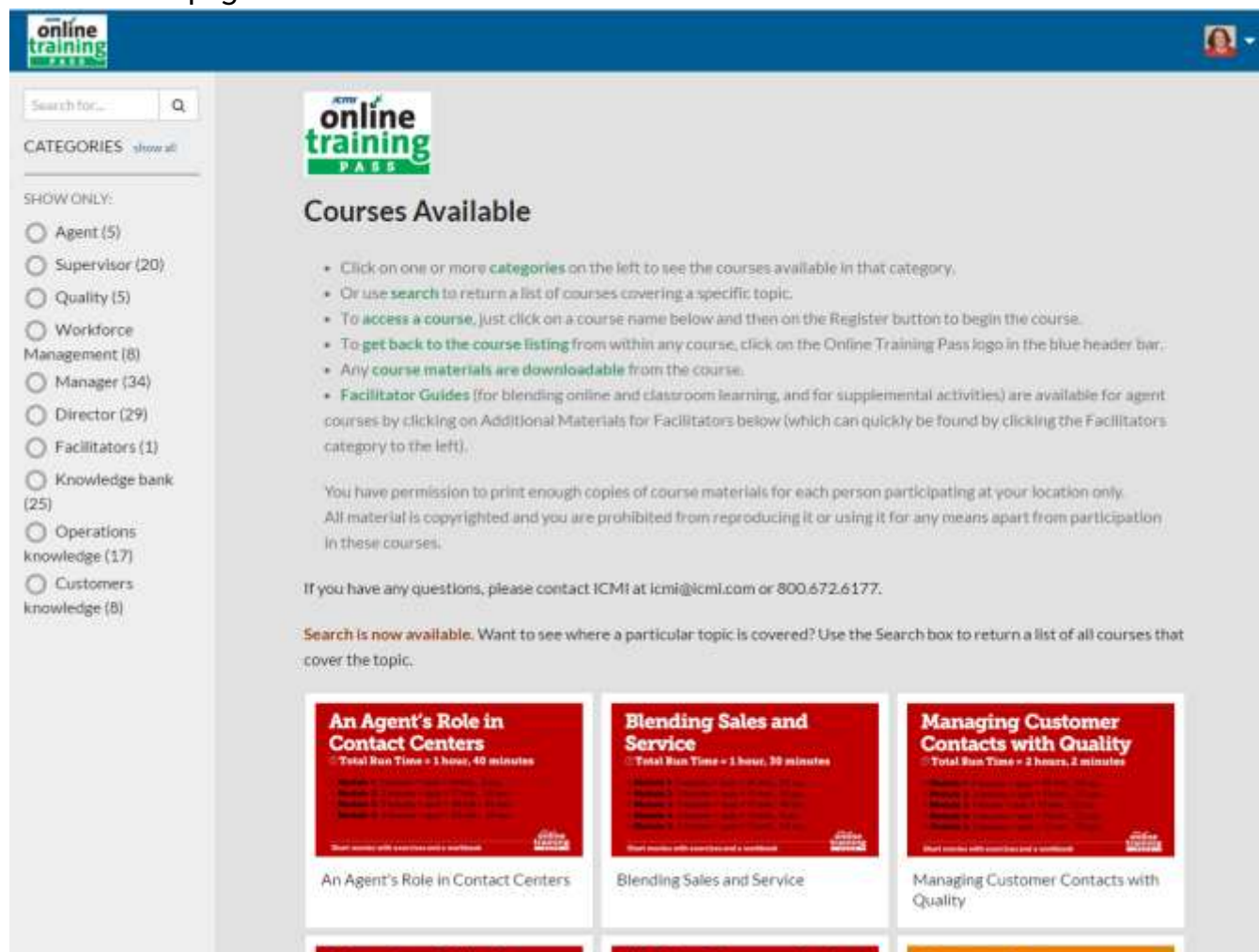4. Type in your company Access code and press Continue.

You now have access to all of the courses in the Online Training Pass.

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Navigating within the Online Training Pass

On the Home page:

You can scroll down the page to see all courses, or you can select one or more categories in the left panel to only show the courses that fit that category (as shown in Figure 1 on the next page).

Click on the category again to remove it or click on *show all* next to the CATEGORIES label in the left panel.

Welcome To ICMI's Online Training Pass
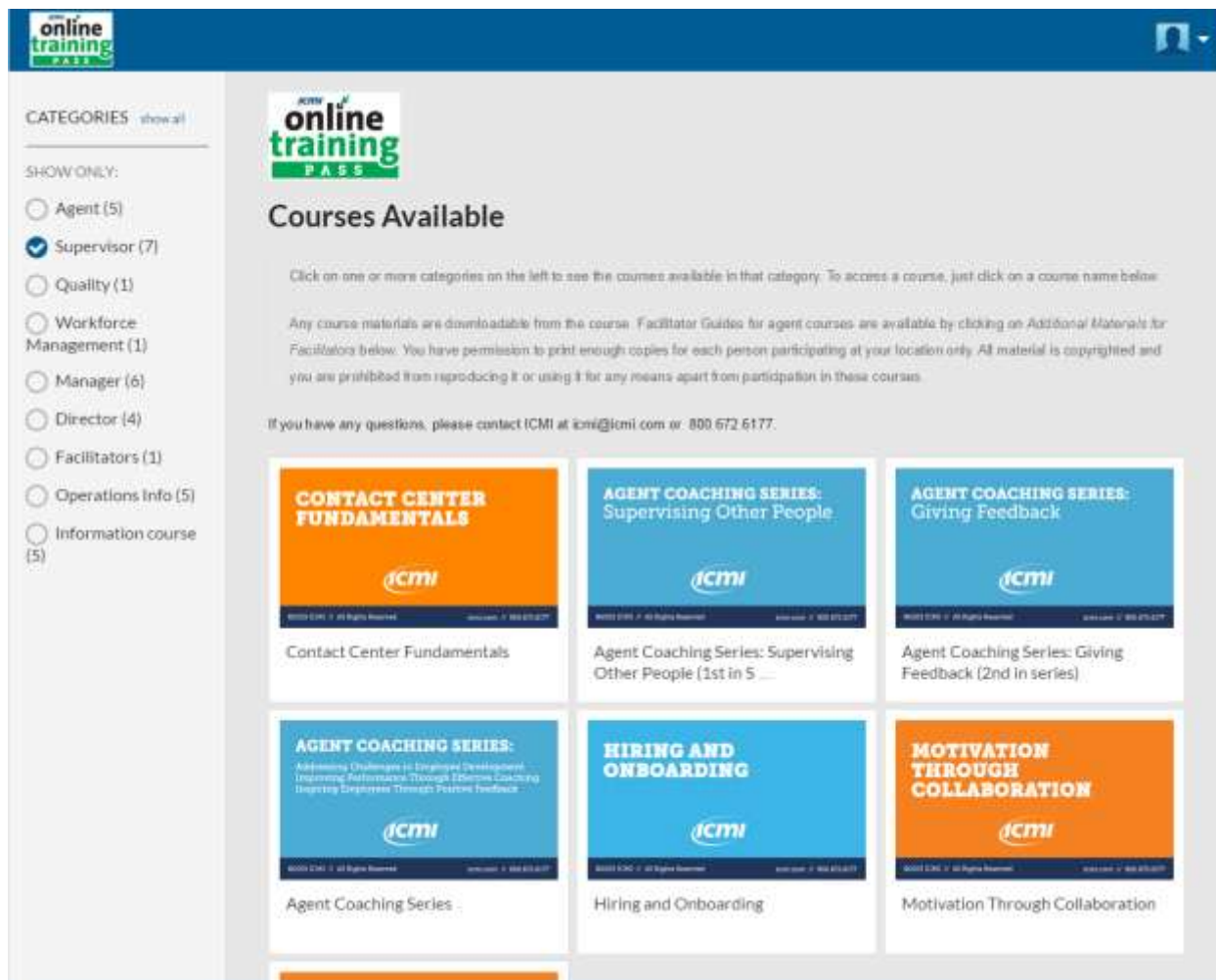# QuickStart Guide

Figure 1: With Supervisor checked, only the 7 courses designed for supervisors will be visible.

Additionally, you can type a key word or phrase into the Search box to find all courses and lessons that are tagged with that word. (See Figure 1a on next page.)

Welcome To ICMI's Online Training Pass
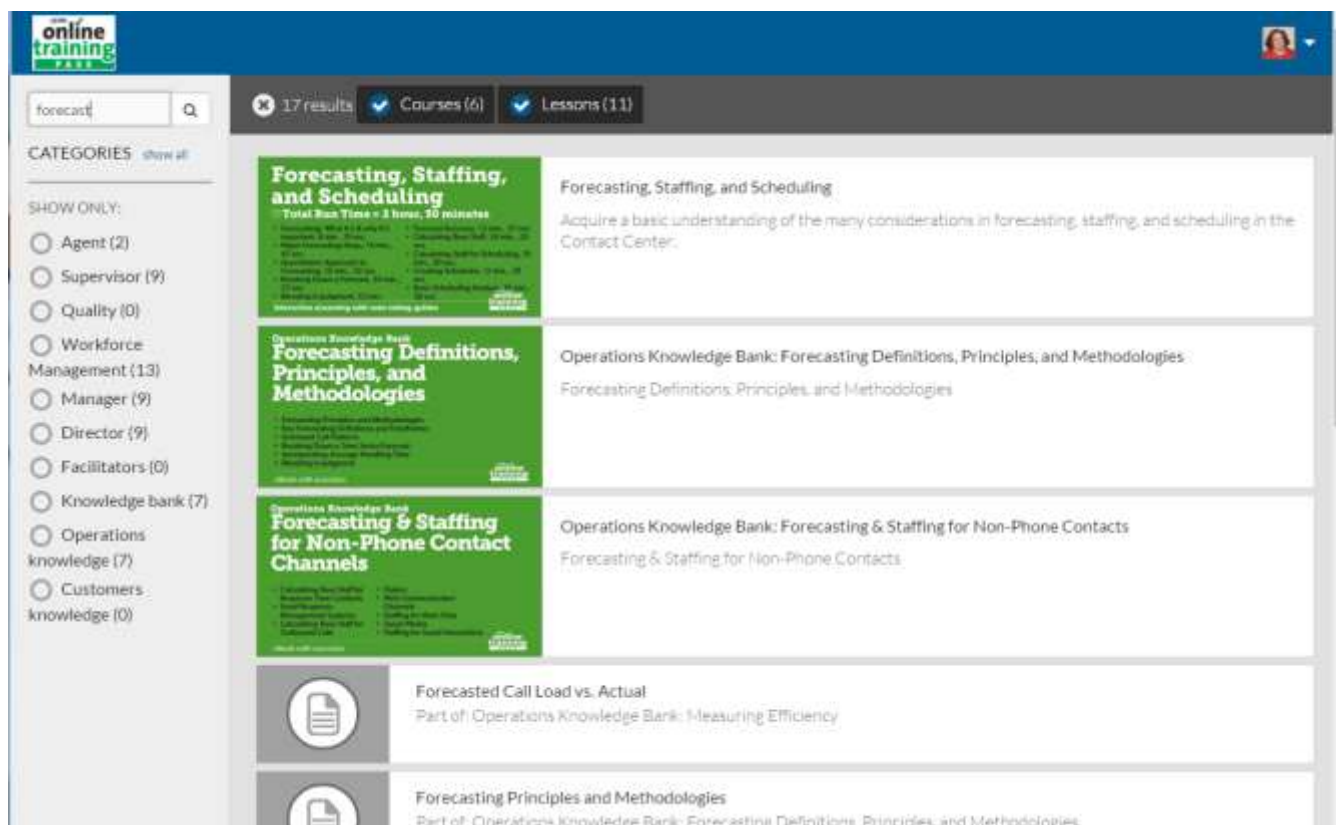## QuickStart Guide

Figure 2: Search results for *forecast*

To remove the search, just click on the X in the header—before the number of results.

To see more information on the course, just click on it.

An Agent's Role in Contact Centers

A successful contact center requires a number of things to be perfectly balanced and aligned. Discover the important role that you play within the contact center and how the "power of one" impacts both your customers and fellow employees.
Total Run Time = 1:39:47

Register | FREE

About this course

A successful contact center requires a number of things to be perfectly balanced and aligned. Discover the important role that you play within the contact center and how the "power of one" impacts both your customers and fellow employees.

Module 1: The Dynamic Contact Center with 3 lessons plus quiz, 19:05

Module 2: Three Driving Forces of Contact Centers with 3 lessons plus quiz, 17:25

Module 3: The Contact Center Planning & Management Process with 5 lessons plus quiz, 39:42

Module 4: Key Performance Objectives for Individuals with 4 lessons plus quiz, 20:24

Curriculum

- Module 1: The Dynamic Contact Center
- Module 2: The Three Driving Forces of Contact Centers
- Module 3: The Planning and Management Process
- Module 4: Key Individual Performance Objectives
- Provide your feedback

Figure 3: Information on the course appears when the course is selected.

Not all courses will have an introductory video, but if the course does (as in Figure 3) that will be on this screen along with a short description of the course, a module listing and additional information about the course. To enter the course, click on the Register button.

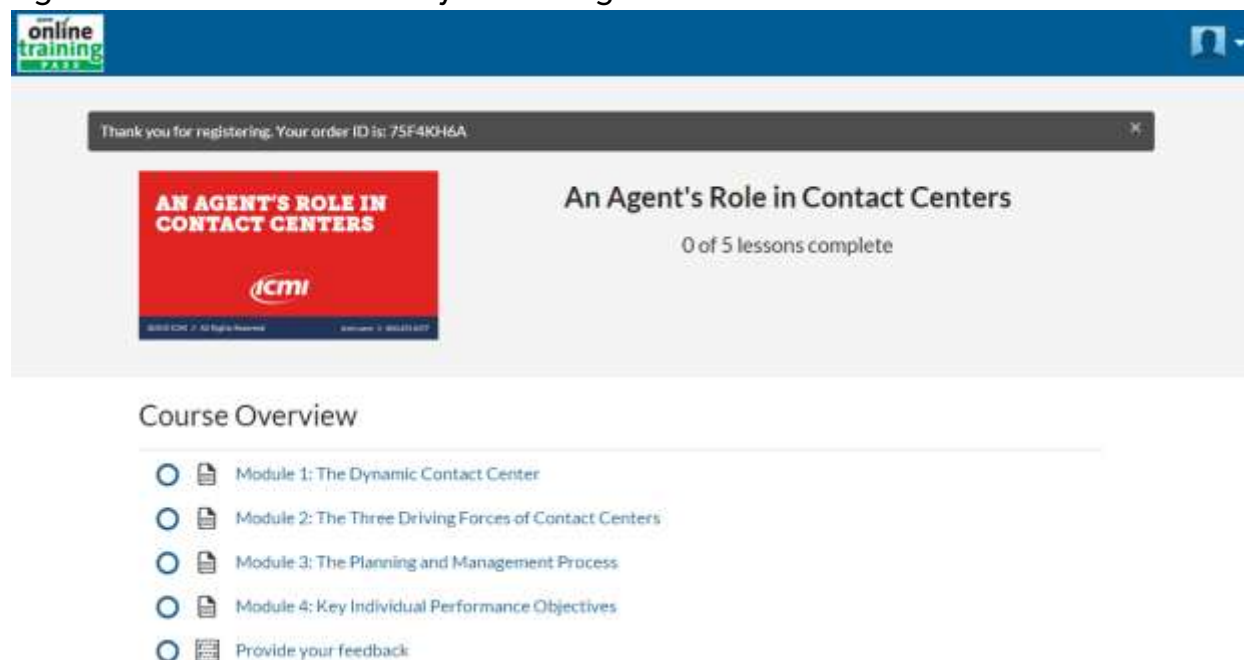Figure 4 shows the screen after you have registered for a course.

Figure 4: After registering for the course, you are ready to work through the modules.

Click on any module to begin the course. The next two pages are labeled with navigation instructions.

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Navigation within a regular course

Clicking on the logo will take you back to the course listing

Clicking on details opens a description of the course

Clicking on Lessons will take you back to the course overview or to any module in the course.

Module 1: The Dynamic Contact Center

Participant materials for the course can be found under Resources and also in the download link. The same materials are in both places.

The menu can be used to move to any section of the module that has already been completed. You cannot skip ahead.

Basic Instructions

Before starting this course, please take a minute to download the Participant Workbook from the Resources link (top right corner).

On slides containing videos, please note that you will not be able to advance until you have reached the end of the video.

Click on Begin or Next to start the course.

Begin

< Prev will take you to the previous lesson. Next > is available only at the end of a lesson and is for continuing.

Movie controls allow you to adjust sound levels as well as to pause for exercises or move back to cover the same area again.

The green Next will take you to the next lesson or module in the course.
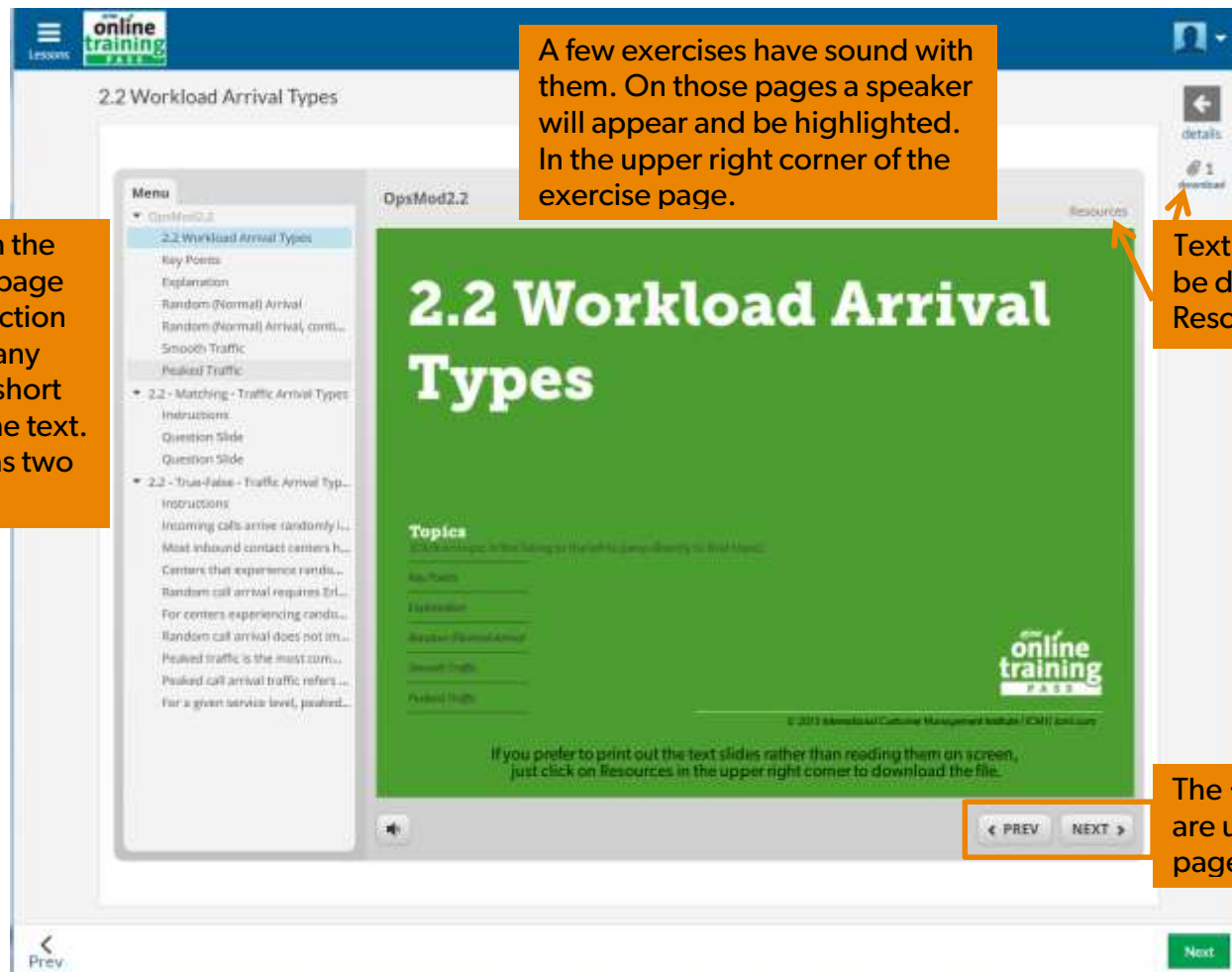
The Prev button at the bottom left corner of the screen will move you to the previous lesson. The button does not appear when there is no previous lesson.

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Navigation within an information course

Information courses are text-based and some have exercises to help reinforce the material. Only the differences from the regular course are marked below.

A few exercises have sound with them. On those pages a speaker will appear and be highlighted. In the upper right corner of the exercise page.

Navigate to any place in the course by clicking on a page in the menu. The first section is text explanation and any remaining sections are short exercises to reinforce the text. This particular lesson has two exercise sections.

Text pages from the course can be downloaded under Resources or download.

The < PREV and NEXT > buttons are used to navigate between pages in the course.
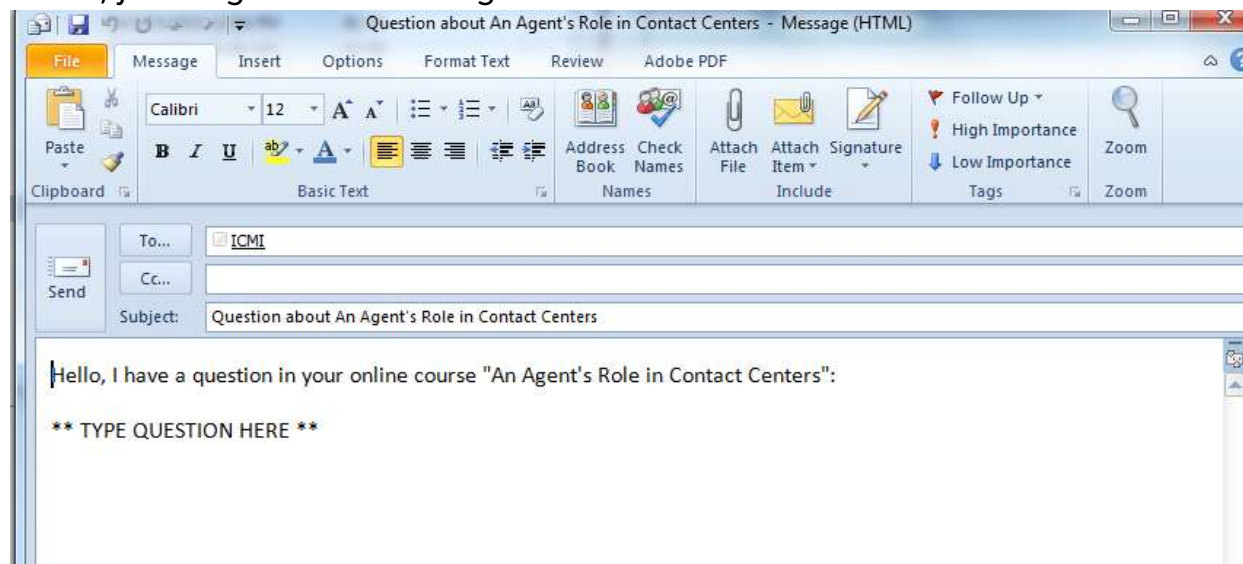
Ask a Question

When you are within a course, clicking on the down arrow next to your avatar gives you the option to send ICMI a question about the course.
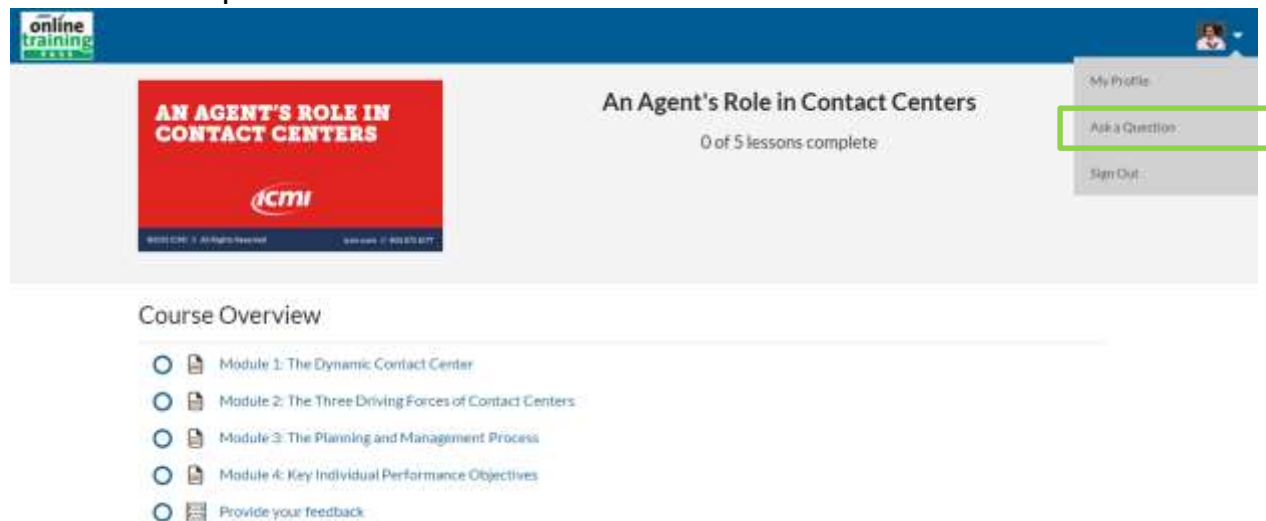

This will open an email like the one below. If the computer you are working on does not have email access, you will get an error message.

Please be specific in your question and someone from ICMI will respond within two business days.

Signing Out

If anyone else might come along behind you and use your computer, it becomes very important to sign out of the Online Training Pass. To do this, click on the down arrow next to your avatar in the top right corner (in the dark blue header bar) and select Sign Out.
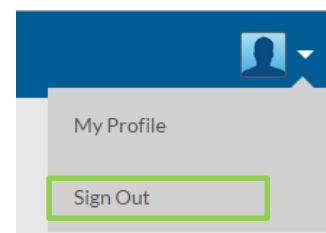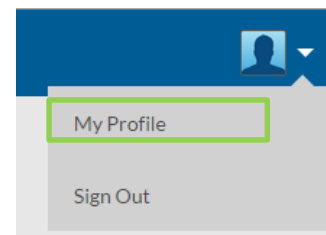
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Your Profile (optional)

Every user has a profile in the Online Training Pass which may be accessed on any page. Just click on the down arrow next to the person's head in the upper right corner of the page. Then click on My Profile.

If others share your computer, it is a good idea to upload a picture for your profile as it will appear in the upper right corner of every screen and you can always be sure that you are working under the right account.

As you can see, your name, email address, and company appear on this page, as do all of the courses you had registered in. **You cannot edit any of these fields within the LMS.** To change your name or email address, go to icmi.com, log in (if you are not already logged in) and then click on Account at the top of the page. Once you have changed your email address on ICMI.com, you will have to use the new email address to log into ICMI's Online Training Pass.

If you would like to, you can **upload a picture** of yourself by clicking on the Upload new file button. That picture will be your avatar and it will appear instead of the generic head in the upper right corner of every page in the Online Training Pass, as on the next page.

It is particularly a good idea to add a picture if other people may be working on the same computer. If you update your avatar, you will always know that you are working in the Online Training Pass on the correct account. It would be terrible to do a lot of work and have it credited to someone else's account. This cannot be transferred should that happen.

The **Receive notifications checkbox** for each course has to do with receiving email announcements about the course, usually in reference to updates or notifications of course retirements. Unclicking on the box will unsubscribe you to all announcements in relation to that course.

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Clicking on a course you have registered for that is listed on Your Profile page, will take you directly to that course.

Materials for Facilitators

The Agent-level courses have Facilitator Guides to help with blending the online learning with instructor-led training. Supplemental exercises and suggested course flows are provided.

To access these materials, click on the course without a picture entitled *Additional Materials for Facilitators*.

Additional Materials for Facilitators

Click on Register
Note: This sends notification to ICMI that you are accessing the materials.

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> Thank you for registering. Your order ID is: 73KJ8W36 ✕

Additional Materials for Facilitators
0 of 5 lessons complete

Course Overview
- ◯ An Agent's Role in the Contact Center
- ◯ Blending Sales and Service
- ◯ Managing Customer Contacts with Quality
- ◯ Managing Difficult Customers
- ◯ Written Communication Skills

> Click on the course for which you want the Facilitators Guide.

Anyone who registers for *Additional Materials for Facilitators* or who downloads one of the Facilitator Guides **will appear on all reports** in relation to the Online Training Pass.

An Agent's Role in the Contact Center

AN AGENT'S ROLE IN CONTACT CENTERS
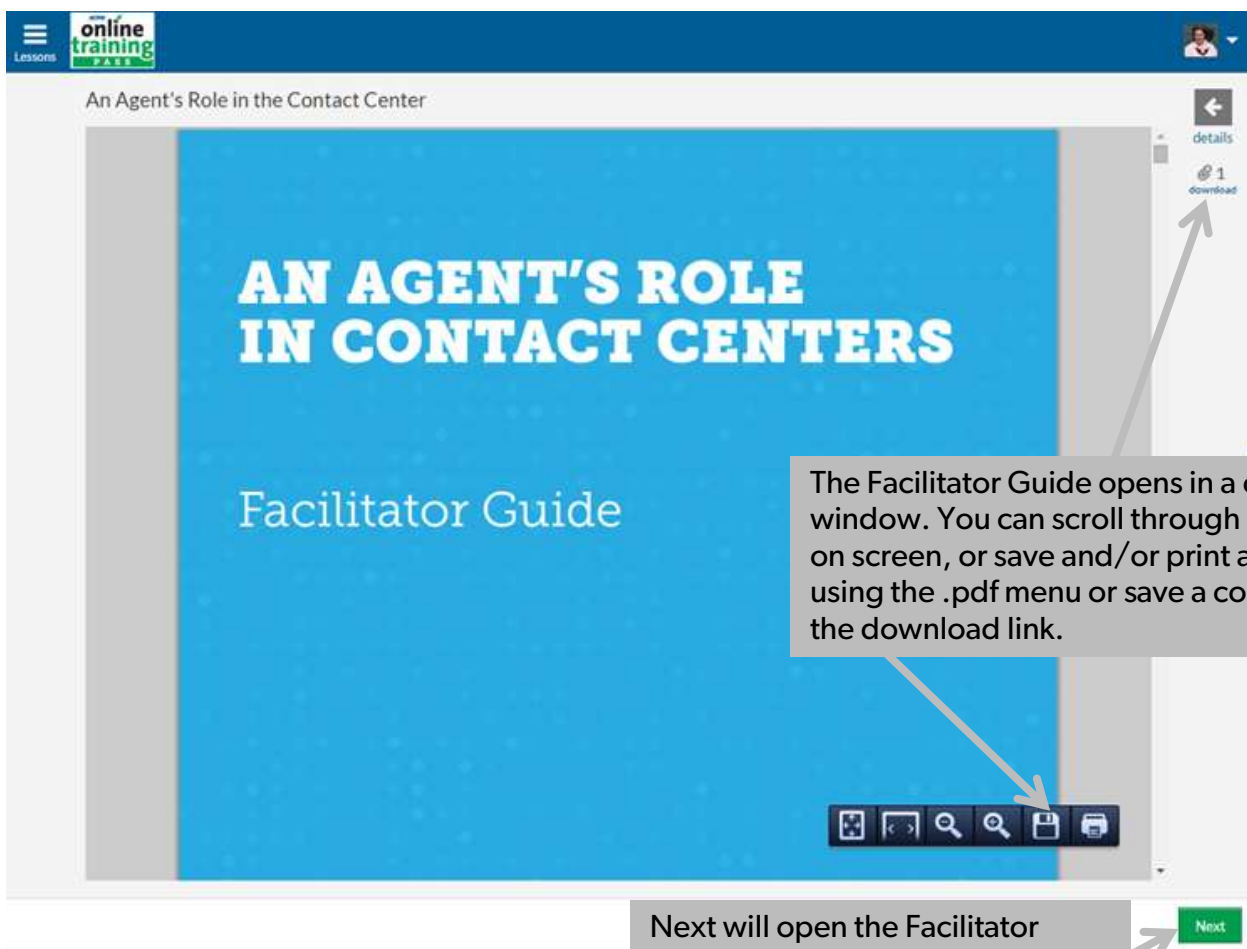
Facilitator Guide

> The Facilitator Guide opens in a course window. You can scroll through it and read on screen, or save and/or print a copy by using the .pdf menu or save a copy with the download link.

> Next will open the Facilitator Guide for the next course.