

CUSTOMER ADVOCATE

COURSE

OUTLINE

Unit 1.0 INTRODUCTION

1.1 - Introduction to Facility and Course

Unit 2.0 PRE ORDER

2.1 – **Review** sales order for completeness and Correctness

2.2 - **Review** sales order / HFO credit application

2.3 - **Create & Maintain** machine file folder

2.4 - **Write** document checklist – Per Machine

2.5 - **Write** gross profit worksheet

2.6 - **Review** order with Controller

Unit 3.0 ORDER PLACEMENT

3.1 - **Access** POOL (**Purchase Order On Line**)

3.1.1 - **Create** a new PO using POOL

3.1.2 - **View** approval status on existing PO using POOL

3.1.3 - **Modify** existing PO using POOL

3.1.4 - **Cancel** existing PO using POOL

3.2 – **Review** financing

3.2.1 – **Write** UCC with your state – as necessary

3.2.2 - **Access** LSM (**Lease Sales Manager**) *CNC Associates*

3.2.3 - **Generate** a proposal using LSM

3.2.4 - **Apply** for a lease using LSM

3.2.5 - **Review** the activity log using LSM

3.3 - **Contact** the Customer

3.4 - **Write** soft booking report – Monthly

3.5 - **Write** booking report – Monthly

3.6 - **Write** status report – Monthly

Unit 4.0 ORDER SHIPPED

4.1 – **Notify** sales, service and applications of machine arrival

4.2 – **Write** shipping reports – as necessary

Unit 5.0 PRODUCT FAMILIARIZATION

5.1 – **Review** the Haas Product Line (Verticals, Horizontals, Lathes and Rotary)

5.2 – **Review** Haas Specialty Machines

5.3 - **Review** Haas Options

5.4 – **Review** Price List

Unit 6.0 OFFICE SOFTWARE

6.1 – **Explore** the benefits of using VISIO

6.2 – **Explore** the benefits of using EXCEL

6.3 – **Explore** the benefits of using ACCESS

6.4 – **Explore** the benefits of using MAS90

Unit 7.0 CUSTOMER RELATIONS (*Customer Service for Dummies* by Karen LeLand & Keith Baily)

7.1 – **Review** Communication Styles

7.2 – **Review** Telephone Etiquette

7.3 – **Review** Handling Difficult Situations and Stress

7.4 – **Read** the assigned references on customer relations