CUSTOMER SERVICE & SALES TRAINING & CERTIFICATION

AGENDA

**Starts: 8:00 a.m. ENDS 3:00 p.m.**

Agenda

8:00- 8:15 Opening (MERA grant, DECA organization, Becoming a Certified CS Proctor instructions)

8:15- 9:00 Materials, LouisianaDECA.com, Pacing Guide

9:00- 9:30 NRF Chapters 1 & 3

9:30-10:30 NRF Chapter 2

10:30-11:00 NRF Chapter 4

11:00- 1:00 Lunch, System Requirement Check, Study guide, sample questions,   
 PowerPoint quizzes, CS IBC Review

1:00- 3:00 Test Setup & Customer Service & Sales Online Test

**Contacts:**

Rae Broussard, MBA Paul Grethel  
Customer Service & Sales Trainer Retired Teacher, La. DECA State Association Advisor, MERA  
Email: [raedidier@hotmail.com](mailto:raedidier@hotmail.com) Educational Consultant, Knowledge Matters Consultant, Business Owner

Keller Williams Realtor Email: [paul.grethel@gmail.com](mailto:paul.grethel@gmail.com) or [mera@laretail.org](mailto:mera@laretail.org)

Email: [raebroussard@kw.com](mailto:raebroussard@kw.com)

**Teachers to do:**

* To use student info: Parent consent for students to use Rise/Castle Worldwide test site & input personal info.
* To teach: Attend the Customer Service Training & take the test at the end of the training.
* [To get site license: Send Paul Grethel the site license application](http://media.wix.com/ugd/053f84_3600bf58bcdd41b2ad78bbf7f61c1f1e.doc?dn=2015%20MERA%20Test%20Site%20License%20Application.doc) (download from CS web page)
* To proctor: The RISE Team sends you a video to watch & then take a short quiz. (35-45 minutes)
* To apply for grant: MERA will email you the grant in August, fill out & return on time w/rosters & signatures.
* [To get vouchers: After students take the pre-test & score >80, email Paul the Voucher Order form.](http://media.wix.com/ugd/053f84_12b65febab9d4a12b414db28856aff6e.xlsx?dn=Customer%20Service%20Voucher%20Order%20form.xlsx) (if you received grant)
* [To check computers: Complete the system requirements check on computers before testing.](https://www.castleworldwide.com/pass/PassLogin/SystemRequirements.aspx)
* [To stay certified: Re-certified every 3 years by sending off the required renewal form and pay $25.00](https://nrf.com/sites/default/files/Images/Career%20Center/NRF%20Foundation%20Certification%20Renewal%20Form_0.pdf) (download from CS   
   site)
* [To get accommodations: Student requests Accommodations during Learner registration and the proctor will approve it](http://media.wix.com/ugd/053f84_e1bda07278304c70b38acb3abef0f8f3.docx?dn=Testing%20Accommodations%20Form.docx).

**LEARNER (STUDENT) Eligibility:**

* [To test: Students take a pre-test & must get >80.](http://media.wix.com/ugd/053f84_8384bc9204bc43f08c643f054e75a894.doc?dn=Customer%20Service%20Screening%20Test%20without%20answers.doc)

Students must be **15** years of age or at least a sophomore in high school.

Students will not be able to test after April 15(rule set by MERA if using MERA grant funding if using a MERA   
 voucher).

* To re-test Student must wait 30 days to re-test. MERA will not pay for a second voucher.

**CUSTOMER SERVICE WEBSITE:** [www.atgfreshstart.com](http://www.atgfreshstart.com)

* If you are using the newer Customer Service Sales & Fundamental textbook (spiral bound), then you can use our new website for your Customer Service classes. It is located at [www.atgfreshstart.com](http://www.atgfreshstart.com). The Classroom Materials page is password protected so that students cannot get to it. The password for that page is FreshStart.

**Steps to Becoming a Customer Service Certified Teacher and then a Certified Proctor:**

1. Complete the Customer Service 1-day class and certification exam—set up your Rise account as a Learner at www.castleworldwide.com/connect/rise

2. Become a certified CS proctor (at the class you were set up as a potential proctor in the Rise system and should have received an email with directions on becoming a proctor. (see below) Your Learner Rise Account will now change to a Proctor Account. If you did not follow these directions and months go by, contact Paul Grethel so he can re-invite you.

3. Associate your Proctor account with a Partner so that you are under a site license. After you pass the proctor certification, sign out, sign back in, scroll down till you see where you can associate your account. Type in MERA.