

## VA CLIENT CARE COORDINATOR SAMPLE TRAINING PROGRAM

Seq	Description	Task / Training Item
1	<b>VA Onboarding</b>	VOIP Phone System Access & Use Training
2		Home Inspection Scheduling System Access
3		MLS or local realtor association access
4		CRM Access
5		Read company policy and procedures; employee handbook
6		Review VA job description
7		Review time keeping procedures
8		Review work schedule
9		Review employer expectations
10	<b>Home Inspection Review</b>	Review service area map & inspector limitations
11		Review types and prices of home inspections to be scheduled (buyer, listing, warranty, phased, new construction, commercial)
12		Review types and prices of ancillary services (add-ons) to be scheduled.
13		Review any 3rd parties that might participate in the inspection (WDI, Radon, Sewer Scope, etc.)
14		Review Handy Phone Number list of software vendors, 3rd party vendors, etc.)
15		Review Top Referral Agent List
16		Start daily pop quizzes on knowledge
17		Review incoming call script to book a home inspection.
18	<b>Buyer Inspections - no add-ons</b>	Role play without using scheduling app.
19		Role play using scheduling app
20	<b>Review</b>	Review & pop quiz of what was learned so far
21	<b>Buyer Inspections - no add-ons</b>	Role play using scheduling app
22	<b>Buyer Inspections - with add-ons</b>	Role play using scheduling app. Practice adding one add-on at a time.
23		Continue day 3 items each day until VA becomes proficient.
24		At that time, they can answer phones but only for buyer inspections; or, you can continue training and put them on phones after training is completed.
25	<b>Review</b>	Review & pop quiz of what was learned so far
26	<b>Listing Inspections -</b>	Role play using scheduling app
27	<b>Review</b>	Review & pop quiz of what was learned so far
28	<b>Phased Inspections</b>	Role play using scheduling app
29	<b>Review</b>	Review & pop quiz of what was learned so far
30	<b>Warranty inspections</b>	Role play using scheduling app

31	<b>Review</b>	Review & pop quiz of what was learned so far
32	<b>One-off Inspections</b>	Role play scheduling one-off inspections (pool inspection, radon inspection, WDI inspection) using scheduling app
33	<b>Review</b>	Review & pop quiz of what was learned so far
34	<b>Reschedule &amp; Cancellations</b>	Role play using scheduling app
35	<b>Reinspects</b>	Role play using scheduling app 1) completion of inspection because utilities are off; 2) verification seller repairs are complete). VA will need to know how you want them to handle these 2 scenarios on the phone and on the scheduling software.
36	<b>Observe Go-live on Phones</b>	Listen and observe VAs
37		Pop-quiz
38		Repeat 36 & 37 until VA is proficient without observation.
<b>You may have to adjust if they are going to process calls for commercial inspections.</b>		

<b>Status</b>	<b>Day*</b>	<b>* Days may</b>
Not Started	1	
Not Started	1	
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Not Started	1	
Not Started	1	
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Not Started	10	
Not Started	10	
	11	
	11	