

Social Media Service Member Training Checklist



Employee Information

Name: _____

Position: _____

1. CX Foundations

- Empathy and customer understanding
- De-escalation techniques
- Active listening (translated to digital)
- Customer journey awareness

3. Written Communication

- Clear, concise writing
- Structured response writing
- Plain language communication
- Tone calibration
- Brevity vs. completeness judgment

2. Measurement and Performance Awareness

- Response time expectations
- Resolution quality standards
- Deflection goals (reducing inbound demand)
- Customer sentiment awareness

4. Product, Billing, and Program Knowledge

- Billing fundamentals (rates, usage, common drivers of high bills)
- Outage basics and restoration processes
- Customer programs (assistance, efficiency, payment plans)
- Common FAQs and known issues

5. Speed, Prioritization, and Workflow Management

- Response time expectations and SLAs
- Prioritizing high-impact interactions
- Managing multiple conversations simultaneously
- Working within high-volume or event-driven spikes

6. Public Interaction and Reputation Awareness

- Public response best practices
- Reputational risk awareness
- Transparency vs. overexposure
- Consistency in messaging

7. Service Channel Decision Making

- Public vs. private response decisions
- When to resolve vs. when to redirect
- When to escalate (and why)
- Use of templates vs. custom responses

8. Escalation and Internal Coordination

- Understanding escalation triggers
- Routing to appropriate teams
- Providing context during handoffs

9. Tools and Systems

- Social media management platform
- Monitoring and listening tools
- CRM/customer systems (if applicable)
- Knowledge base usage
- Outage or system dashboards (visibility level)

10. Platform-Specific Engagement Skills

- Platform norms and expectations
- Response timing expectations by platform
- Use of tagging, threading, and visibility tools
- Managing high-volume comment environments