TRAINER'S LAB WITH ALEXIS

FREE TRAINER RESOURCE

THE CSR TRAINER'S QUICK GUIDE TO LIVE-CALL READINESS

7 training gaps that leave new hires unprepared for live customer calls — and what trainers can do about them.

A praactical 10 -minute read for customer service trainers, team leads, and onboarding teams.

PRESENTED BY

CSRSIM PRO

Smarter Training, Stronger Performance.

BEFORE THE FIRST LIVE CALL

Training completion is not the same as call readiness.

A trainee can finish every module, pass a knowledge quiz, and still struggle when the phone rings.

The missing middle

1 **KNOW**
Understands policies, systems, and procedures

2 **PRACTICE**
Applies knowledge in realistic, connected workflows

3 **EXECUTE**
Handles the interaction with less prompting

THE CORE QUESTION

Can a new hire complete the whole customer interaction, not just explain individual steps?

Use the next pages to spot training gaps before they surface as long handle times, repeat calls, incomplete notes, or constant supervisor intervention.

GAPS 01–04

Where new hires get stuck

Look for the behavior, not just the knowledge score.

1

Knowledge without execution

Can recite the steps but cannot carry them out during a call.

2

Predictable mock calls

Does well when the customer follows the script, then stalls with a surprise question.

3

Navigation dependency

Can locate information in a standalone exercise but loses the workflow while speaking.

4

Slow resource retrieval

Knows an answer exists somewhere but cannot find or apply it independently.

TRAINER MOVE

During practice, introduce one realistic interruption and watch which step breaks down first. Capture the observation in plain language.

GAPS 05-07

What happens after the trainee knows the basics

These gaps often appear in nesting, even when classroom performance looked strong.

5

Decision-making hesitation

Asks for approval on routine actions instead of using approved guidance.

6

Incomplete documentation

Handles the conversation but misses an account update, note, follow-up, or wrap step.

7

Attendance mistaken for readiness

Moves forward because training days or modules are complete, not because the workflow was demonstrated.

TRAINER MOVE

For each gap, write one observable behavior you would need to see before saying the trainee is ready. Example: "Locates the correct resource and applies it without a hint."

Important: A single mistake does not automatically mean a trainee is unready. Look for patterns across realistic attempts and coach toward improvement.

FROM SYMPTOMS TO BEHAVIORS

Listen for the stall. Then find the friction.

Instead of assuming a trainee "needs more training," trace what actually interrupted their progress.

WHAT YOU NOTICE

"They keep putting callers on hold."

WHAT TO INVESTIGATE

Are they searching across too many sources? Unsure which screen to use? Rechecking an obvious answer?

WHAT TO PRACTICE

Build a realistic call with an account question that requires locating and applying a specific approved resource.

WHAT TO WATCH

Can they find the right information, explain it clearly, and return to the call flow without a prompt?

BEFORE THE NEXT NESTING DAY

Three questions worth asking

Use these as conversation starters with your training team — not as a formal certification scorecard.

1

Can they connect the steps?

Listen, verify, navigate, take the appropriate action, document, and close without losing the thread.

2

Can they handle a change in the script?

Try a customer who supplies incomplete details, asks a second question, or changes direction.

3

Can they show independent judgment?

Watch whether they identify the right resource, act within their authority, and recognize when escalation is appropriate.

TRY THIS AT YOUR NEXT TEAM HUDDLE

Ask each trainer: "What is the one moment when our trainees most often need help during a live call?" Compare answers. That moment is a strong candidate for more targeted practice.

WHAT STRONGER PRACTICE LOOKS LIKE

Make practice feel like the work.

You do not need a complicated exercise to improve realism. You need tasks that require trainees to use what they know.

1

Connect actions

Combine verification, system navigation, account action, and documentation in a single interaction.

2

Introduce realistic variation

Change a customer detail, add a distraction, or present an exception that requires checking guidance.

3

Require observable execution

Ask the trainee to take the action rather than describe what they would do.

4

Review independence

After practice, discuss where they needed hints, where they self-corrected, and what to repeat.

SMALL ACTION FOR THIS WEEK

Choose one existing mock call. Add one realistic complication and one required account action. Observe the result before changing the entire training program.

READY TO PUT IT INTO PRACTICE?

Turn training insights into repeatable practice.

This guide helps you recognize where trainees struggle. The **Live-Call Readiness Toolkit** helps you structure what happens next.

LIVE-CALL READINESS TOOLKIT

77 pages of practical, ready-to-use training resources designed to help you build more realistic practice, coach with consistency, and prepare new hires to execute essential call workflows with greater independence.

- 10 editable mock call scenario templates
- Customer verification checklist
- Trainer scoring sheet
- Account navigation practice template
- Documentation quality checklist
- Call wrap-up code template
- 12 AI prompts for building and adapting training activities
- 90-Day Action Plan Roadmap

GET YOURS TODAY!

Spend less time building training materials from scratch - and more time helping trainees practice, improve, and build confidence before go-live.

EXPLORE THE TOOLKIT

See what's included and view the complete toolkit.



Created by Trainer's Lab with Alexis | CSRSIM PRO. For educational use. Adapt examples to your organization's approved workflows, policies, and customer-data protections.