Mock Case Template

Provide the information to build a complete mock case. Please do not just use a real case and change the names as this may still lead to an issue of PII. It is acceptable to use a real case or issue as a starting point and create the mock case from there.

Sharing

When creating your mock case, be sure that you set the sharing to allow anyone in Big Tech to access it, and to give editing rights to [Team]. This will enable others to be able to view your case and allow the IDs to tweak the formatting as needed.

Titling Your Mock Case

For the title and filename of your mock case, use the following format:

- Product Group: Product - Brief description of the case issue

This will make it much easier for others to locate your mock case when viewing all the mock cases together.

Define Mock Case Objectives

Determine the type of mock case you are creating, and the purpose of the case exercise. You should also indicate the expected experience level of the TSE working the case to help define your recommended audience. For example, “This case is designed for TSEs with 6 weeks or more experience.” Use the following as a guide:

- TSEs with 6 weeks or more experience - Basic
- TSEs with 8 weeks or more experience - Advanced
- TSEs with 10 weeks or more experience - Difficult

Customer Focus Mock Case

These types of cases revolve around customer issues. The cases may deal with how to handle difficult customers, how to get information from customers, how to set customer expectations, how to handle customer escalations, or any number of other customer-centric issues. Objectives include customer-handling skills, using established processes to resolve conflict, and customer-related soft skills. These types of cases can be a challenge to create, since there are no concrete troubleshooting steps to follow, and much of the exercise will be dictated by the customer reaction. It is best to establish the framework and the desired goal, and then provide as much context as possible for the instructor.

Procedural Mock Case

This type of case is geared towards making the New Employee more familiar with the case-building process. The objectives focus on how to create the case correctly, how to document the case, and the tools used to do so. This type of case is typically geared towards a very inexperienced audience. Make sure the case is not overly complicated or difficult to resolve. You should focus on issues that can be solved by using public documents or playbooks or other means of reference.

Technical Mock Case

A technical mock case focuses more on the troubleshooting aspect and resolving the issue. These cases can be more complex in nature from a troubleshooting point of view. Objectives should focus on proper troubleshooting procedures, using tools to resolve the issue, and creating a series of logical troubleshooting steps to work towards a resolution. These types of mock cases require very specific and detailed instructions for the troubleshooting portion so that the instructor can properly answer questions and guide the New Employees to the correct solution.

Mock Case Checklist

Include this section in your mock case. NOTE: This checklist is for the mentors that will be presenting the mock cases. For the TSEs creating the mock case, it is not necessary to do all the things on the checklist.

Use the following checklist to ensure you are ready to conduct the activity:

- ❏ The customer environment is built and can be accessed as needed.
- ❏ The test case has been created in Salesforce and populated with the necessary information.
- ❏ All the learner TSEs are logged in and are signed on to present as needed.
- ❏ You’re familiar with the case and are comfortable with playing the role of the customer.
- ❏ The learners understand the purpose of the activity and how to conduct it.

Creating the Environment

If possible, create a script that when run will automatically configure the environment for use by the mentor in the activity. If that is not possible, list the steps to create the customer's environment in the [application]. This will allow mentors to effectively respond to questions and requests to perform troubleshooting steps.

Also include: **Time needed to create the environment: xx:xx**

Customer Issue

Explain the issue the customer is reporting. Use words and explanations that a typical customer would use. It is okay to leave critical troubleshooting information out (but include it in the next section), so that the New Employees have the opportunity to request more information.

Customer Information and Troubleshooting

Provide additional information about the customer and their configuration. Add any details that you feel are necessary for the New Employees to know to solve the issue. Also provide all the troubleshooting the customer has performed up to this point, as well as any documentation (official or not) that has been read prior to opening the case. Again, try to do this from the customer perspective.

When used in instructor-led training, feel free to withhold critical information if the New Employee is not asking the correct questions. You can show them how to better interact with the customer and provide more focused and clear questions.

Detailed Troubleshooting Steps

List the steps needed to resolve the issue. Steps should include the resources the New Employee would need to access or the tools the New Employee would need to use. Link any playbook and documentation that is relevant to proceed, and explain the reasoning behind the troubleshooting steps. It is especially useful to also list steps that do not provide a solution, but help narrow down the issue.

Remember that, in some lessons, the person playing the part of the customer has to be able to provide the information needed to help the New Employees resolve the case. If the information is not listed here, the presenter will not know to discuss it during the troubleshooting process.

Resolution

Describe the proper resolution to the case. Be sure the New Employees follow all steps that are required to close a case.

Review

If there is any additional information that would be helpful to review, list it here. This could include additional commentary, alternate troubleshooting steps, or future guidance to provide the customer. Here are some questions to ask:

- *“What else can we learn from this experience?”*
- *“Which part of the process could we have streamlined?”*
- *“How effective was the documentation in resolving the issue?”*
- *“What would you do if this problem/scenario were not found in a playbook?”*
- *“Could we have done better?”*
- *“How could this have been avoided in the first place?”*
- *“Should we provide the customer with any next steps or additional information?”*