



Tech Savvy Seniors

MY TELSTRA APP TRAINING GUIDE

HOW TO USE THIS GUIDE

This training guide provides you with the information and materials needed to teach those with minimal digital skills how to manage their Telstra account using the My Telstra App.

This guide is accompanied by a Presentation with images and videos to enhance the learning experience.

There is also a 'My Telstra App Quick Reference Guide' that can be printed and given to the participants to take home and a 'How to get a Telstra ID' sheet that may be helpful for some participants to work through ahead of the session.

The information symbol found throughout this guide indicates additional notes for the trainer about the delivery of the workshop.

WORKSHOP OUTLINE

TOPIC: USING THE MY TELSTRA APP

OVERVIEW

This is a short interactive workshop that can be conducted one-on-one or in small groups to familiarise participants with accessing and using basic features of the My Telstra App (manage account, track data usage, get help etc). It begins with a general introduction to apps.



WHO IS THIS WORKSHOP FOR?

This workshop is for Seniors, people with minimal digital literacy skills, or any Telstra customers who need support to access and use the My Telstra App.

Potential participants may be at different stages in their journeys with the My Telstra App. Ideally, participants with similar needs will be grouped together, but at the very least you will need to be aware of their different needs and app readiness. Broadly speaking, the likely participants fall into these groupings:

1. Complete Beginners - Want to learn what an app is and how to download the My Telstra App on to their device and how to use it.
2. Ready to Learn - Already have the My Telstra App on their device and want to learn how to use it.
3. Information Gatherers - Simply collecting information to help them decide if they would like the app, and are joining the session just for the theory and discussion.

At registration, you need to ask which group the participant most identifies with.

If all participants are Complete Beginners, you will run through the full course with them including downloading the My Telstra App. Note they will still need to come with their Telstra ID.

If participants are Ready to Learn, you should begin with the same introductory content but then skip “Session 1” (slide 3) and go straight from the Introduction to Session 2.

Information Gatherers could participate in a course beginning at either point, as they are simply looking for an introduction to apps and My Telstra generally.

WHAT PARTICIPANTS NEED

If borrowed devices are used participants should be reminded not to save personal data (account details etc) and to log out at the conclusion of the session.

The prerequisites below are recommended in order to get the most out of the workshop. However, participants without a device can also take part in the theory and discussion. In some cases, it may be possible to use library or other borrowed devices.

1. Device: An iPhone or Android mobile phone or tablet. (Operating system must Apple iOS 11 or later, or be Android 5.1 or later).
2. Personal Details/My Telstra App: their Apple ID or Google Play account details including password (if they have not yet downloaded the My Telstra App) OR have already downloaded the My Telstra App on their device.
3. Telstra ID: Participants (whether Complete Beginners or Ready to Learn) will need their Telstra ID and password to log in to the My Telstra App (or be already permanently logged in)
4. Banking Details (optional): The course will cover how to set up direct debit to pay bills. If participants wish to implement this payment method during the session, they should bring with them their bank account details (account number and BSB) or credit card details (card number, expiry date and card verification details from reverse of card).



NOTE – Trainers/library staff should be prepared to assist participants who do not have a Telstra ID with creating one ahead of the training session by:

1. Giving those who are reasonably confident a copy of the ‘How to get a Telstra ID’ instruction sheet; or
2. Opening up www.id.telstra.com.au/register and working through the process with the participant; or
3. Directing them to the My Telstra App if they have already downloaded it. Open the My Telstra App, tap on “sign in or register,” then follow the link.

WHAT PARTICIPANTS LEARN

After doing the program participants will:

- Have downloaded and set up the My Telstra App on their device (if they have one).
- Be able to navigate to different areas of the My Telstra App.
- Be able to use basic features of the app to manage their Telstra account, monitor usage etc.
- Be able to seek help through the My Telstra App where required.
- Be able to set up direct debit.

TRAINER PREPARATION

In this workshop, you will be providing a general overview of apps and what they offer and then demonstrating key features of the My Telstra App.

Details to access a “dummy” My Telstra App are provided which you can use for both familiarisation and demonstration purposes.

TO RUN THIS WORKSHOP, YOU WILL NEED THE FOLLOWING ITEMS:

Accounts

- You will need an internet connection as well as a Wifi password to share with participants if you would like to invite them to participate in the session using WiFi (otherwise they will need to use their mobile data).
- You will need a device with the My Telstra App installed and signed in using the dummy account details. These are:
 - Telstra ID: **Digital006@telstra.com**
 - Password: **Winter0006**

The Dummy ID is for Trainer use only.



Equipment

- You will need a desktop or laptop computer with the Training Presentation on it and a linked projector.
- You will need an Apple or Android mobile device (phone or tablet) as above. The My Telstra App will work with most android devices, iPhones and iPads. However, the app is not compatible with some older devices. The device must meet the following “operating system” (OS) requirements:
 - Android 5.1 or later
 - Apple iOS 11 or later

If your phone is not using the required operating system, you may be able to update (eg on iPhone: Settings > General > Software Update). However not all older models can run the newest version of the operating system.

Materials

You will need the Presentation that accompanies this manual saved on to the computer you intend to use or on a USB drive. Ideally you will be able to project the Presentation onto a larger screen. If this is not possible, however, or if a computer is unavailable, you can simply print out the Presentation to share with participants, as well as:

- A few printed copies of the ‘My Telstra App Quick Reference Guide’ to give to the participants to take home.
- A few printed copies of the ‘How to get a Telstra ID’ sheet to make available to participants who need them when they register

A note on accessibility: some participants may have accessibility needs (eg vision, hearing) in order to participate fully in the workshop. Some general tips are contained in this Telstra document: www.telstra.com.au/content/dam/tcom/seniors/pdf/TSS_Easy_Access_Tips.pdf

Note that only some of these tips relate to the mobile devices (tablets and phones) that will be used in the workshop. (As of 27 June 2020, the My Telstra App met all Level A standards of the Web Content Accessibility Guidelines (WCAG) version 2.1, which explain how to make web and mobile content more accessible to people with disabilities). The My Telstra App responds to changes in font size (this is done in the Settings menu of a mobile device).



DOWNLOADING THE MY TELSTRA APP

Download and log in to the My Telstra App on the mobile device before the workshop, so you are ready to go.

DOWNLOAD THE MY TELSTRA APP

For iPhone or iPad

Visit the App Store and download the My Telstra App (you may need your Apple ID password to do this).

For Android phone or tablet

Download for free. Visit the Google Play Store and download the My Telstra App (you may need your Google password to do this).

SIGN IN TO THE MY TELSTRA APP WITH THE “DUMMY” TELSTRA ID

Once you have downloaded the app, open it and tap on the box that says “sign in or register.” Sign in with the dummy ID.

Note: if you are a Telstra customer and are already signed in to My Telstra with your own details, you should log out and sign back in with the dummy details so you are not using your personal account during the workshop. At the end of the workshop you should sign out of the dummy account by clicking on the “person” icon in the top right corner of the app, tapping on “Manage Telstra IDs”, and then tapping “sign out”. You will then need to log back in using your personal details if you wish to continue using My Telstra for your own account.

Please remember: the dummy ID is for Trainer use only.

The notes above will also help you when assisting Complete Beginner participants with the process of downloading the My Telstra App (session 1 – slide 3).

(“Ready to Learn” participants should arrive with the My Telstra App already installed on their device).



TODAY'S SCHEDULE (SLIDE 2)

TIMETABLE

Total time: approx. 60 minutes

The workshop consists of an introduction and four sessions with an optional break in the middle. Times are indicative only. Activities can be shortened or extended depending on the interest and level of the group.

Subject: Introduction. Duration: 10 minutes. Slides Title-2.

- Discussion: What do people know about apps? Which have they used before? What are the advantages?

Session 1: Installing and opening apps. Duration 5 mins. Slide 3.

- Where do we find apps? How do we install them?

Session 2: My Telstra overview. Duration 12 mins. Slides 4-5.

- Finding the app on your device, opening it and logging in.
- Identify the three areas to be covered (Home Page, Get Help, Payments)

Session 3: How to get help through the app. Duration 15 minutes. Slides 6-13.

- General discussion about getting help
- Activity: Locate the "Get Help" page
 - Initiate a conversation with Telstra
 - CrowdSupport
 - Resolve a conversation

Session 4: How to pay your bill through the app. Duration 15 minutes. Slides 14-17.

- Overview of services and payments tabs
- Activity: Manage payment of your account
 - Find out when is your next bill is due
 - Pay a bill
 - Set up direct debit

Conclusion. Duration 3 mins. Slides 18-19.

- Show "Navigating My Telstra" Video
- Any final questions, provide handout, remind participants about practising and getting help through the app



GETTING STARTED – INTRODUCTION (SLIDES TITLE-2)

SUBJECT: INTRODUCTION

TIME: 10 MINUTES

OVERVIEW

This information will help you tailor the workshop according to the needs of the group.

This is a short interactive workshop to familiarise you with accessing and using basic features of the My Telstra App.

The aim is to give you the confidence to experiment with the My Telstra App, so you can gradually become skilled at using it to manage your account and enjoy the convenience and benefits this brings.

As a starting point, let's check

- Who has used apps before?
- What have you used them for?
- Do you already have the My Telstra App downloaded?
- What do you hope to get out of this session?

TYPES OF APPS

With the help of apps, your mobile phone can be... a radio... a mapbook... a magnifying glass (or a novel, guidebook, shopping trolley, bank teller, card game, weather forecaster).

- Discuss what apps are, types of apps (for information, shopping, managing services, gaming etc), how they can help.
- Ask: what are your favourite apps? Share a couple of favourite apps. Eg the weather app on your phone
- Apps are also increasingly being used as a way of communicating with the government and other organisations – including Telstra



STARTING OUT IS SIMPLE

(Reassurance) This session will not cover every aspect of the app, and it is important to understand that you do not need to have a detailed knowledge of the app before beginning to use its basic functions.

In this workshop we will look at how to:

- Locate the My Telstra App on your device and log in
- Navigate to different areas of the My Telstra App, starting with the Home Page
- Seek help through the My Telstra App where required
- Use basic features of the app to manage your Telstra account, monitor usage, pay bills and so on

SESSION 1 – WHAT ARE APPS AND HOW DO WE GET THEM? (SLIDE 3)

SUBJECT: OVERVIEW OF APPS AND LEARNING HOW TO GET THEM

TIME: 5 MINUTES

OVERVIEW

In this subject we will cover how to install apps on your device and ensure everyone has the My Telstra App on their phone

LOCATING/DOWNLOADING APPS

Most participants should already have the My Telstra App on their phone, but this will be needed if they don't.

Even if they have the app already, this serves as a refresher and may be useful for other apps

If participants have never downloaded an app before they will first need to set up an Apple ID or Google Play account – this needs to be checked before the session starts. Most people will already have one of these. (Their Apple ID is the account that they use to access Apple services. If they use iCloud, for example, use this Apple ID).

Note: if participants already had the previous 24x7 Telstra app, they can update to My Telstra by enabling automatic updates in the Telstra 24x7 app settings.



Discuss how to download/install apps

- Explain the different approach to downloading for Apple and Android (App Store vs Google Play)
- Demonstrate how to download an app
- Demonstrate how to find the My Telstra App if it has already been downloaded

Your mobile phone or device has a dedicated area to download apps:

- For Apple devices (iPhones and iPads), apps are bought (if there is a cost) and downloaded/installed from an area called the App Store.
- For other devices (those which use the “android” platform, like a Samsung phone or tablet), apps are bought and downloaded from “Google Play”.

Downloading the My Telstra App

Downloading the app involves a few simple steps. You will need your Apple ID or Google Play login details:

- The next step is to locate the App Store or Google Play icon on your device, and touch to “enter”.
- A magnifying glass on the bottom right (in the App Store) indicates a search area.
- Enter the words “My Telstra” in the search area and “search”. The app will be the first item.
- Tap “install” for the My Telstra App and follow the prompts to download. You may need to enter your Apple ID or Google Play password. This happens even though there is no charge, and is designed to protect your device from having unwanted information downloaded. When the End User Terms appear, you will need to select “Accept” to start download
- You should now see the icon for the My Telstra App appear on your device. Click on this to “launch” the app. Alternatively, search again for “My Telstra” in the App store/Google Play. If the app is already downloaded on your device then you will be given the option to “Open” it.



SESSION 2: MY TELSTRA OVERVIEW (SLIDES 4-5)

SUBJECT: MY TELSTRA OVERVIEW

TIME: 12 MINUTES

OVERVIEW

During this workshop we will look at three key areas:

- The Home page
- Getting Help – CrowdSupport and how to message
- Payments – how to pay a bill and set up direct debit.

First we will get an overview of these areas, then look at them in more detail.

LOGGING IN

Some participants may need assistance logging in. Check participants are logged in before proceeding. The app needs to know who you are – we tell it by logging in with our Telstra ID. This also acts like a password protecting the privacy of your account. Once you log in you will stay logged in unless you “sign out”.

Can everyone log in to My Telstra now (if you’re not already logged in). You use your Telstra ID to do this. (If participants wish to know how to sign out, explain: you can do this by clicking on the “person” icon in the top right corner of the app, tapping on “Manage Telstra IDs”, and then tapping “sign out”).

A note on privacy: if you choose to stay logged in to the app, this means users of your phone will be able to access your personal details. It is sensible to also include either password or “touch ID” protection on your phone. That way if you lose your phone your privacy and the details in any apps is protected.

ACTIVITY – EXPLORE THE APP

Now we are going to start exploring the app. Think of the app like a short book. It has a number of pages. You can see the names of the pages running along the bottom. The information in your app is unique to you. It reflects the particulars of your account so they won’t all look the same.

One of those pages is called Home. Can everyone please click on the Home Screen.

- The Home screen gives you a personalised snapshot of your services and important updates. Use your finger on the screen to scroll up and down.
- Tap on “View All” to see more about your services.
- What can you find out about “Your Services”?
- Tap on the “>” to get more details
- Is your account Pre-paid or a billed service?
- How much data do you have left?
- How many days left until your data “resets”?
- What else can you see?



SESSION 3 – GETTING HELP THROUGH MY TELSTRA (SLIDES 6-13)

SUBJECT: HOW TO GET HELP THROUGH THE APP

TIME: 15 MINUTES

GETTING HELP

The important thing is to familiarise participants with the “get help” icon. If short on time you may prefer to cover the first and third features only (messaging and CrowdSupport), and just mention that Product Help is available.

The next page we are going to explore is the Get Help page. There are two icons that will be really helpful to you: the “Get Help” icon, which is visible on every page of the app, and the message icon which is your gateway to speaking with Telstra. Remember, the “Get Help” icon can be found on any page of the app so if you are ever unsure about something you can always use this to find your answer.

Can everyone tap on the “Get Help” icon now.

Again, this page is personalised to you. It features a number of the common things people request help for. Use your finger on the screen to scroll up and down.

There are a number of reasons you might want to ask for help. Can you think of any?

They might include:

- Query a bill
- Request a payment extension
- Book an in-store appointment

Today I am going to draw your attention to three main features on this page.

FEATURE 1 – MESSAGING

The first feature I want to show you is the app messaging function.

The messaging function allows you to communicate directly with a human expert, known as a “Telstra Expert” – you type a message to Telstra and an expert will type a message back.

Messaging through the app like this is the best way to get in touch with Telstra: it’s quicker, and there is always a record of any conversation you’ve had in the past, so you can refer to it later on if need be.

The app messaging function is accessed via a little picture that looks like a ‘speech bubble.’ When you go to the “Get Help” page, this icon appears on the bottom right of your screen. Alternatively, you can scroll down the Get Help page to the Contact Us section, and tap on “Message us”.

Now we’re going to give it a go. I’d like everyone to tap on the ‘speech bubble.’



Now you should have received a nice welcome message at the top.

At the bottom is a section where you can write a message. You tap on the white box and your keyboard will appear.

Try typing a message and see what happens. You could:

- Say hello to Telstra
- Ask a question

There is no need to be formal in your communications, Just converse naturally as you would when asking a friend for help.

The message you typed is actually triaged by an automated “person” who Telstra calls “Telstra Assistant”. Telstra Assistant decides whether it can send you an automatic reply (the system has been programmed with automatic responses to a number of common questions). If none of the automatic responses are relevant, the system will then connect you to one of Telstra’s human experts. You will always have the chance to connect with a real person if you need to.

You can then correspond directly with Telstra through the messaging function - you can send Telstra messages and respond on your own time. This means you don’t need to sit waiting for a response. You can write your message and then do other things – you will get a notification when Telstra has responded, and your conversation will not be lost even if you leave it for a long time.

At the end of a conversation, when your question is resolved or you no longer want to pursue it, you should end the messaging conversation. You can do this by telling the assistant you are “All Done” or by “resolving” the conversation. To mark as resolved while you are in the messaging window, click on the 3 dots at the top and tap “mark as resolved”. You will also see that there is an option here to mark your enquiry as urgent.

(Note that just shutting down/closing the message window does not close or deactivate the conversation – it will still be sitting there. A messaging string is finished once either party marks it as “resolved” – an agent will do this once they have finished with a customer’s enquiry, or the customer can do it themselves.)

FEATURE 2 – PRODUCT HELP

The next feature I want to show you is the Product Help. Telstra has put together a range of information that may be helpful – you can explore it by area. You may be able to find the answer to your question without getting in touch with Telstra – but remember the messaging option is always there if you need it.

Let’s explore this now together, to see the types of information available. You can tap on “Mobiles”, “Home” Or “Accounts”, and then select a more detailed option from there. As you can see, there is a lot of information available through the app.



FEATURE 3

The third feature is “Ask our community” - this is a feature you can explore to see if someone else has already asked the question you have and got an answer.

Can everyone please scroll down the Get Help page until they see “Ask our community” and tap on it – it will take you through to a section called CrowdSupport. Scroll down, you can select a topic. And then you can view all the questions others have asked and if you’re brave you can even Start a topic.

Remember, whatever you post can be seen by anyone else who is logged in and scrolling through this CrowdSupport section. You can check back later and see if anyone has responded to your question.

Now I want you to tap “done” at the top – and this will take you back to the Get Help page.

OPTIONAL ACTIVITIES

1. Exploring “Get Help”
2. Book an in-store appointment

SESSION 4 – PAYING YOUR BILL (SLIDES 14-19)

SUBJECT: MANAGE YOUR ACCOUNT THROUGH THE MY TELSTRA APP

TIME: 15 MINUTES

OVERVIEW

It is important to protect the privacy of participants, particularly relating to bank details and financial matters. While this course discusses payment and direct debit processes in general terms, the trainer should be careful not to view or access participant’s financial details.

Now we are going to learn how to pay a bill through the app, and how to set up direct debit if you wish to.

ACTIVITY: PAYMENTS

The Payments section provides a view of a customer’s payment details, including outstanding amounts and direct debit details, and allows customers to make a payment, query a bill, report a payment and view previous bills.

Activity: A closer look at paying bills

- Go to “Payments” tab
- Tap the relevant account
- Tap “Pay now” (or “Pay in advance” if relevant) and follow the prompts



Activity: Direct debit

- Go to “Payments” tab
- Choose a bill and then select “Set up direct debit” (NB direct debit will not activate if there is any amount currently owing – you must pay off any amounts owing before you begin the Direct Debit process).
- Select from an existing payment method or add a new credit/debit card or bank account.
- Only click on “submit” if you actually wish to proceed with setting up the Direct Debit!

EXTRA HELP

Only if time and interest.

Use the Reviewing “Payments” Tab slide to reflect on what participants have learned and can find at this tab.

FINAL QUESTIONS AND WRAP UP

At the end of the session the trainer should sign out of the dummy Telstra account (see introductory notes).

Show Navigating My Telstra video to recap on what has been covered, and see if any final questions.

- Thank participants for coming and for their interest.
- Encourage them to take the handout and practice at home.
- Remind them they can always message for help through the app.
- Using the app is the best way to learn.