

Opportunity at a Glance

Service Type: Phone Customer Service & Tech Support

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Service Revenue

Please contact your Call Center for details



Certification

Course Duration

Phase I
12/13/18

Phase II
12/14/18 – 1/4/19

*No classes 12/24,
12/25, 12/31, 1/1

Class Times Offered

Monday – Friday

9:00 AM – 1:00 PM ET

2:00 PM – 6:00 PM ET



Service Intervals

Suggested 30 interval (15 hour) SOW

Intervals Available*

Monday – Friday
9:00 AM – 8:00 PM
EST

Special Interval Requirements

4 interval Friday
requirement

4 interval weekend
requirement

40 interval requirement
during weeks of 1/27/2019,
4/7/2019, and 4/14/2019

Most Intervals Available *

Monday – Friday
11:00 AM – 7:00 PM EST

**Subject to change
based on client needs.*



Equipment

Equipment Must Meet Platform Standards
[Click Here for System & Equipment Policy](#)

Additional Client Program Technology Standards

- A USB head set with phone quality audio will be required, examples include: Logitech h390 USB headset & Plantronics Model C320

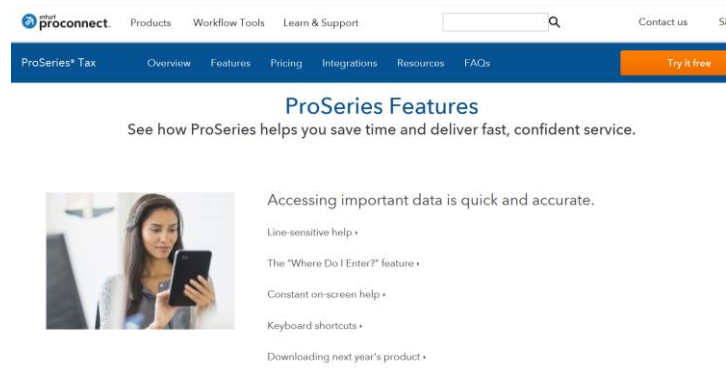
Client Overview

Service Type: Phone Customer Service & Tech Support

Intuit Inc. is an enterprise software company that develops financial and tax preparation software and related services for small businesses, accountants and individuals.

Intuit Proconnect ProSeries is tax preparation software that is used in bookkeeping and accounting offices where there is more than one preparer, and complete a high volume of returns. The software is tailored more to professionals who are familiar with preparing returns and require high efficiency. Call center agents that support this program will be providing technical support and e-file support to Intuit customers via the phone.

For more information about Intuit ProSeries review the client's website <https://proconnect.intuit.com/proseries/>.



What to Expect

Service Type: Phone Customer Service & Tech Support

- Interact with ProSeries business customers (mid-sized tax preparation and accounting firms) to provide premium service to these high value customers via phone, assisting with tech support and general e-filing support questions (knowledge of tax concepts a plus)
- Provide quality customer service while demonstrating the ability to effectively troubleshoot and resolve inquiries related to software installation, reinstallation, and other software support matters
- Provide caring, empathetic and white glove customer interactions that positively represent the Intuit ProSeries brand

Capabilities of Top Performing Call Centers for this Program

- Ability to demonstrate a sincere desire to assist the customer, and puts the customers' needs first
- Ability to align and communicate with the customer effectively
- Tenacity to understand the customer's business needs and provide the appropriate recommendation
- Ability to quickly build rapport with customers
- Patience and understanding to diffuse tough customer situations
- Ability to search quickly in Intuit's knowledgebase as well as public search tools (Google.com, etc.)



Certification Course Details

Service Type: Phone Customer Service & Tech Support

Class Times Offered

Monday - Friday

9:00 AM – 1:00 PM ET

2:00PM – 6:00PM ET

Important! This course consists of 4 hours of instructor-led learning & up to 2 hours of self-paced work per day. Failure to complete self-paced work will result in the agent failing certification with no refund.

100% attendance in instructor lead sessions is highly encouraged for success!

Read complete course policies [here](#)



Phase I Log-in Party

12/13/18

This phase is:

An overview of how to login to all Intuit systems.



Phase II Instructor Led eLearning with Self-Paced Modules

12/14/18 – 1/4/19

*No classes 12/24, 12/25, 12/31, 1/1

This phase is:

- An overview of tools, knowledge, resources and practice call-time necessary to use client systems and provide quality service to client customers with service, tax support and technology issues.

This course is:

- A combination of self-paced and instructor led
- 4 hours of instructor led classroom
- 2 hours of self-paced work

Certification Completion Criteria

- Complete pre-course work prior to day 1 of class (if applicable)
- Successfully pass mock call scenarios with the instructor
- Successfully pass 2 out of 3 live call evaluations
- 100% completion of daily self-paced work
- 90% or greater on each assessment
- 80% or greater on commitment adherence quiz
- 85% or greater on mid-term and final assessments

PLEASE NOTE – FOR SECURITY PURPOSES LEARNERS MUST ATTEND THE FIRST THREE DAYS OF CLASS TO CONFIRM LOGIN CODES,

Codes will be deactivated for learners who do not attend the first three days, and they will be removed from class. Please ensure your agents attend. Failure to take and/or complete any assessment may result in a drop from the course without reimbursement.

Enrollment Prerequisites

Service Type: Phone Customer Service & Tech Support

**THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK
AND AFFIDAVIT OF IDENTIFICATION**

Step One: A background check will be prompted once you start the enrollment process if you have never enrolled in a client program through the Arise Platform before, or if you haven't had one in the past six months. The background check will include, but not be limited to, a check of disqualifying criminal convictions for at least the immediately preceding 10 year period.

IMPORTANT INFORMATION REGARDING BACKGROUND CHECKS

Please note if you have frozen your credit, you will have to temporarily lift the credit freeze with Experian. You do not need to lift the freeze at the other credit bureaus. Please lift the freeze for a minimum of 10 days. You will need to wait at least 24 hours before attempting the background check.

If you have recently changed your name, it may delay or disrupt the background check. Please make sure that full and correct legal name is included in your profile and provided in the background check step. Also, please ensure the Experian is aware of your name change.

Arise uses First Advantage to complete the background checks. Under certain circumstances, First Advantage may reach out to you to clarify your information. Your prompt response to First Advantage will accelerate the process of completing your background check and enrollment.

Step Two: Notarized Affidavit of ID

A completed, notarized affidavit of identification with photo ID must be on file.

- This step can be skipped if you have already submitted a valid Affidavit of ID on a previous opportunity
- Click on the link to access the Affidavit of Identification: [Affidavit of Identification](#)
- Once completed, submit this form to AriseAffidavitOfIdentification@arise.com
 - Please make sure to include User ID/CSP ID in the subject line, along with the name of the client program you are enrolling in.

Please note:

- Arise will not process system access codes, required to attend the certification course, until ALL enrollment pre-requisites have been successfully completed and provided to Arise.
- If the learner is removed or dropped from the opportunity for failure to complete all steps listed above, no refunds will be provided.

Service Level Requirements

Service Type: Phone Customer Service & Tech Support

Service level requirements vary and are subject to change

Failure to meet one or more of the service level requirements may result in termination of the SOW. The service level requirements may be modified from time to time upon commercially reasonable notice to the business.

Service Level Requirements		Metrics Definition
Commitment Adherence	90%	% of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as $\left[\frac{\text{Serviced Minutes}}{\text{posted Minutes} + \text{Released Lockdown Minutes}} \right] \times 100$
Case Compliance	>85%	The number of cases opened and closed vs the number of calls handled.
Issue Resolution	>80%	the ability to resolve an issue in the first call whereas the customer would not have to call a repeated time for assistance.
Net Promoter Score (NPS)	>60	The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend the client's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with the client's product or service and the customer's loyalty to the brand. It is typically gauged through a survey administered after a call.
Transfer Rate	<20%	Percentage of calls that have to be transferred in order to complete.

STAR metrics requirements vary and are subject to change.

Star metrics and corresponding Incentives are included in the Production SOW. Certification SOW does not include Star.

	1 Star		2 Star		3 Star	
	Metric	Min Requirements	Metric	Min Requirements	Metric	Min Requirements
	Net Promoter Score	>70	Net Promoter Score	>70	Net Promoter Score	>70
			Intervals Serviced	≥ 60	Intervals Serviced	≥ 60
					Case Compliance	>92%
Incentive	\$0.15 per interval \$0.30 per hour		\$0.30 per interval \$0.60 per hour		\$0.45 per interval \$0.90 per hour	

Additional Information

Service Type: Phone Customer Service & Tech Support

Log-in codes are confidential, user specific and will only be generated for confirmed course attendees

- To confirm a company's intent to attend, Arise may be contacting the call center owner or their agent registered to attend the certification course a minimum of 10 business days prior to the start of class.
- Failure to confirm your company's intent to attend will result in a delay of codes and may result in either removal from the course or placement into an alternate course. Please make every effort to provide a timely response.
- Commitment Adherence is critical to this program. Companies are responsible for ensuring that their agents service all intervals that have been accepted in StarMatic®.

[See Sample Statement of Work](#)

A company DOES NOT QUALIFY to participate in this program if any of the following applies to the company or their agent enrolling in the opportunity:

- Has one or more SOW terminations on file due to performance.
- Has dropped from enrolled status in a client opportunity less than four weeks before expressing interest in this client opportunity.
- Has a Commitment Adherence below 90%
- Is currently contracted on another Intuit program.
- Contact information for the call center's owner and their agent(s) must be up-to-date to be eligible for this opportunity. If Arise is unable to contact the call center owner or any of the call center's agents, they will be dropped from this opportunity without further notice.

All call centers must ensure that their agents have a professional work environment, free from any background noise, when in class and when servicing.**DISCLAIMER**

This Opportunity Announcement (OA) is intended as a summary of the applicable business opportunity. It is not a legal document, nor a comprehensive review of all terms included in the applicable Statement of Work (SOW).

You should thoroughly review each SOW prior to executing it. In the event of a conflict between the OA and the SOW, the terms of the SOW will take precedence. Arise recommends a thorough review of all policies prior to enrolling in the certification course.