Intuit TurboTax Smartlook™ - Video Support

Contents

Service Revenue

IMPORTANT!

Please reach out to your Call Center owner for revenue details

Certification

Course Duration

Phase I
1/2/2019 – 1/23/2019

Class Times Offered
Monday – Friday

9:00 AM – 1:00 PM ET
10:00 AM – 2:00 PM ET
1:30 PM – 5:30 PM ET
4:00 PM – 8:00 PM ET
6:00 PM – 10:00 PM ET

Service Intervals

Suggested 40 interval (20 hour) SOW

Intervals Available*
1/1/19 – 4/27/19
Sunday – Saturday
8:00 AM EST – 12:00AM EST

Most Intervals Available*
Monday - Friday
11:00 AM EST – 9:00PM EST

Weekend Requirements
8 intervals (4 hours) required on Saturday, Sunday or a combination of both

Peak Day Requirement
6 intervals (3 hours) on Mondays
10 intervals (5 hours) on 4/15/19
6 intervals (3 hours) on 4/16/19

Equipment

Equipment Must Meet Platform Standards
Click Here for System & Equipment Policy

Additional Client Program Technology Standards

- USB headset is REQUIRED. As well as regular headset that is used for regular phone.

- Additional equipment required - the Smartlook™ Chat Pack. It is provided upon full payment of course and includes:

    - Logitech C170 Webcam
    - Webaround Banner Round Ocean Blue

Intuit TurboTax Smartlook™ - Video Support

Service Level Requirements	Service Type: Customer Service & Software Tech Support

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.

Metric	*	**	***
Intervals Serviced	40 - 59	60 - 79	>80
NPS	50 -52.99	53 - 54.99	>55
Contact Resolution	80 - 82.99%	83 - 87.99%	>88%
INCENTIVE (Pre-select)	0.00	$0.50/interval	$1.00/interval

Systems & Equipment	Service Type: Customer Service & Software Tech Support

**Equipment Must Meet Platform Standards**
Click Here for System & Equipment Policy

Additional Client Program Technology Standards

- USB headset with phone quality audio (NEEDS mute/volume controls), below are 2 suggestions:
    - Logitech h390 US headset (part#981-000014) controls
    - Plantornics Model C320 (part#85619-102) controls

- Additional equipment required - the Smartlook™ Chat Pack. Call centers with agents who serviced through SmartLook™ Video any previous tax season, will use the Chat Pack previously used.
    - Logitech C170 Webcam
    - Webaround Banner Round Ocean Blue

- Call centers are required to purchase and wear a *white* Polo-style shirt with no visible logo.
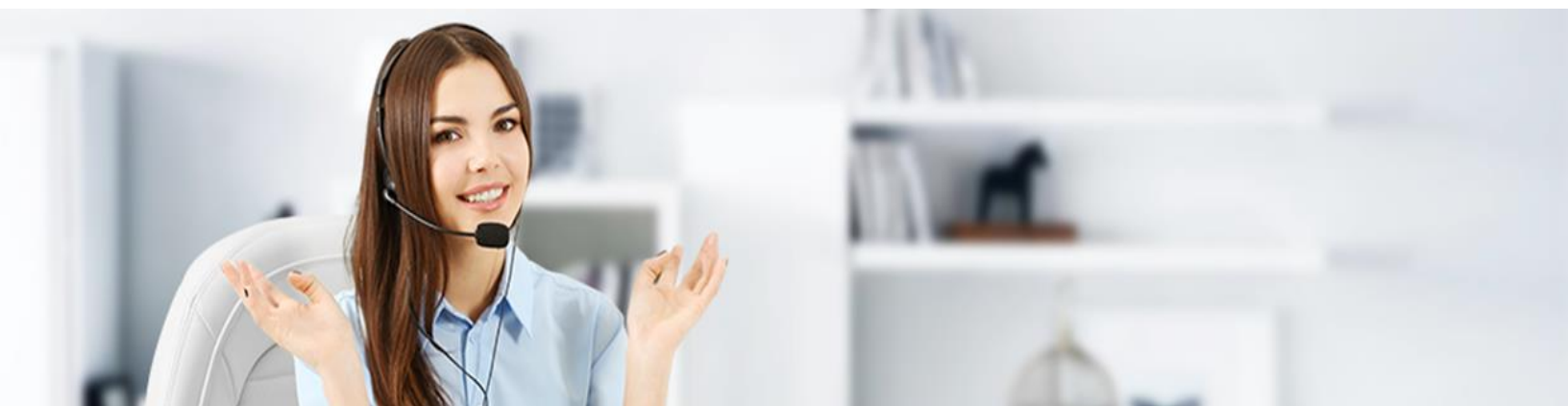
Client Overview

Service Type: Customer Service & Software 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.

TurboTax is a tax preparation software package and is one of the most popular income tax preparation software packages in North America. The software is designed to guide users through their tax returns step-by-step.
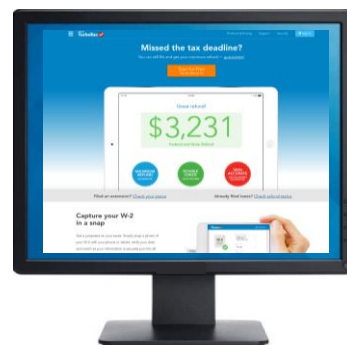
What to Expect

Service Type: Customer Service & Software Tech Support

- Inbound phone and video customer service/technical support. Handle technical support questions via phone, with video capability.

- Research, analyze and determine an appropriate course of action for TurboTax customers.

- Interact with customers via phone focusing on software navigation questions as well as assisting customer with locating prior years' returns and amendments.

- Serve as ambassador for the Intuit brand; take a caring and empathetic approach to customer interactions and/or escalation to a higher level of expertise.

- Document all issues, resolution and follow up actions

- *Call Centers that provide service during peak season (January – May, 2019) will be required to use SmartLook™ screen share to assist customer via one-way video.*

Certification Course Details

Service Type: Customer Service & Software Tech Support

Class Times Offered

Monday - Friday

9:00 AM – 1:00 PM ET

OR

10:00 AM – 2:00 PM ET

OR

1:30 PM – 5:30 PM ET

OR

4:00 PM – 8:00 PM ET

OR

6:00 PM – 10:00 PM ET

100% attendance in instructor lead sessions is highly encouraged for success!
Read complete course policies here

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Phase I
"Log-in Party"

1/2/2019 – 1/2/2019

This course provides: Opportunity for agents to learn how to log-in to all systems and troubleshoot any challenges prior to the start of class

Phase II
Instructor Led Learning & Self-paced Learning Modules

1/3/2019 – 1/23/2019

This Phase Is:

- IN-DEPTH: Requires strong attention to detail, lengthy periods of intense concentration, and a great deal of learner involvement and class participation

- Four Weeks: Four hours of instructor led content per day and up to two hours of self-paced content

Certification Completion Criteria

- Pre-assessment must be taken and passed with 70% or greater on first attempt.
- Complete pre-course work prior to day 1 of class (if applicable)
- Successfully pass mock call scenarios with the instructor
- Successfully pass live certification call-taking days (if applicable)
- Provide a completed notarized affidavit of identification with photo ID
- 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: Customer Service & Software 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 must be successfully completed within three business days. If this is not done, the learner will not be able to gain access to client systems

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 compete 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 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 [Serviced Minutes/(posted Minutes + Released Lockdown Minutes)] x 100
Average Handle Time (AHT)	15 – 18 minutes	Talk time + Hold Time
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	<10%	Percentage of calls that have to be transferred in order to complete.
Case Completion	>95% - <103%	The rate by which the agent is noting caller-related details and steps to issue resolution in client systems.

Additional Information	Service Type: Customer Service & Software 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:

- Have one or more SOWs that were terminated for cause.
- Dropped from "enrolled" status in a program opportunity, less than 4 weeks before
- Currently enrolled in any Intuit program
- Has a Commitment Adherence below 90%
- If the company's agent is already servicing an Intuit Program (i.e. if servicing Intuit PCG, company's agent may not service Intuit Phone Video).
- If the company's agent services Intuit for any other company with which Intuit is contracted.
- Does not complete pre-assessment with 80% or greater.
- Was terminated from Intuit within the last 12 months.
- Had an SOW on an Intuit program terminated within the last 12 months.

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.