Intuit QuickBooks

Contents

Service Revenue

Base Rate
For revenue information, please contact the call center you work for.

Certification

Course Duration

Phase I
12/06/2018 – 01/10/2019
Class Times Offered
9:00 AM – 11:00 AM EST
12:00 PM – 2:00 PM EST
4:00 PM – 6:00 PM EST

Phase II
01/11/2019 – 01/14/2019
Class Times Offered
9:00 AM – 11:00 AM EST
12:00 PM – 2:00 PM EST
4:00 PM – 6:00 PM EST

Phase III
01/15/2019 – 02/14/2019
Certification SOW

No class on the following days:
12/24/2018
12/25/2018
12/31/2018
01/01/2019

IMPORTANT
On 12/11/2018 agents will be required to spend four hours in instructor-led class (9:00 AM – 1:00 PM EST, 12:00PM – 4:00PM EST or 4:00 PM – 8:00 PM EST

Service Intervals

Suggested 30 interval (15 hour) SOW

Intervals Available*
Monday – Friday
9:00 AM ET – 6:00 PM EST

The Most Intervals Available*
Monday – Friday
9:00 AM ET – 3:00 PM EST

Subject to change based on client needs

Equipment

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

Client Overview

Service Type: Customer & Product Support

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

QuickBooks is an accounting software package developed and marketed by Intuit. QuickBooks products are geared mainly toward the self-employed, small and medium-sized businesses and offer PC based accounting applications as well as cloud based versions that allows the user to accept business payments, manage and pay bills, and perform payroll functions.

In September 2015, Intuit released QuickBooks 2016, containing new features such as batch transaction, bill tracking, continuous feed label printer support, and batch delete/void transactions. In September 2016, Intuit released QuickBooks 2017 with several improvements like automated reports, smart search and improved viewing of report filters.

For more information about Intuit QuickBooks review the client's website https://quickbooks.intuit.com/.

What to Expect

Service Type: Customer & Product Support

What to Expect

On a day-to-day basis, call center companies can expect to participate in the following activities:
- Interact with QuickBooks customers via phone, focusing on process related questions, data entry and navigation.
- Research, analyze and determine an appropriate course of action for QuickBooks customers.
- Be a positive representative for Intuit and the QuickBooks product; take a caring and empathetic approach to customer interactions.
- Articulate how to use the QuickBooks product accurately and efficiently resolve customer inquiries on the first contact.
- Provide quality customer service while demonstrating the ability to effectively troubleshoot and resolve advanced technical inquires.
- Act as a technical resource when assisting customers to resolve problems with devices and equipment.

Capabilities of Top Performing Call Centers for this Program

- Outstanding problem-solving skills
- Displays patience, empathy, an ability to manage stress, the ability to work under pressure
- Skilled and efficient in writing and verbal communication
- Provides knowledgeable, friendly and eloquent customer service
- Knowledge and experience with Intuit QuickBooks a plus

Certification Course Details

Service Type: Customer & Product Support

Class Times Offered

Monday - Friday

9:00 AM – 11:00 AM EST

OR

12:00PM – 2:00PM EST

OR

4:00 PM – 6:00 PM EST

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Phase I

eLearning & Self-Paced Work

12/06/18 – 01/10/19

This phase provides:
An overview of tools, knowledge, resources and practice call-time necessary to use client systems and provide quality service to client customers.

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: Two hours of instructor led content per day and up to four hours of self paced content.

Phase II

Earn While You Learn!
Instructor-led Course with live call-taking

01/11/19 – 01/14/19

This phase provides:
An opportunity to apply what you've learned in Phase I to live calls, while earning revenue and continuing the eLearning experience.

*Minimum 20 intervals (10 hours of service)

Phase III

Earn While You Learn!
Certification SOW

01/15/19 – 02/14/19

This phase provides:
An opportunity to apply what you've learned in Phase I & II to live calls in a supportive environment.

*Minimum 20 intervals (10 hours of service)

Certification Completion Criteria

- 100% completion of daily self-paced modules each day as well as complete attendance of instructor-led sessions each day
- 80% or greater on each knowledge check for client applications
- 80% or greater on commitment adherence quiz
- 80% or greater on mid-class and final assessments
- Meet a minimum 20 service intervals (10 hours) per week during Blended/Apply phase of certification
- Meet all quality and live call taking requirements as outlined in the Certification SOW
- A completed notarized affidavit of Identification with photo ID

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.

THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK AND AN AFFIDAVIT OF IDENTIFICATION

Step One: A background check may 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 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
- 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.

Step Two: Notarized Affidavit of Identification
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**
  - o 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: Customer & Product 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: [(Serviced Minutes + Excused No Show Minutes) / (Selected Minutes + Released Lockdown Minutes)]x100
Net Promoter survey Score (NPS)	≥ 69	Average Net Promoter survey Score (promoters - detractors) for a given period
Issue Resolution	≥ 85%	% of issues resolved on the first call
Case Compliance	≥ 90%	% of cases documented in client system.
Average Handle Time (AHT)	Approximately 24 minutes	Talk Time + Hold Time Average Handle Time is the average time spent resolving a customer issue, including talk time, hold time, transfer time (if applicable) and after call work

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 program opportunity less than 4 weeks before expressing interest in this program opportunity.

- Is currently enrolled in or contracted on another Intuit program.

- Has a commitment Adherence rating below 90%.

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.