

OPPORTUNITY ANNOUNCEMENT



intuit.

**Intuit Lacerte | Customer Service and
Inbound Renewal Support**
Customer Service & Inbound Sales



**Service
Revenue**

Service Revenue
\$14.00 per hour*
(\$7.00 per interval)

**Hourly rate shown assumes the servicing of two, 30-minute intervals.*



Certification

Class Schedule

Phase I

04/06/2021 – 04/26/2021

Phase II – Start Earning Revenue!

04/27/2021 – 04/30/2021

Class Times Offered

Monday – Friday

9:00 a.m. – 12:00 p.m. ET

2:00 p.m. – 5:00 p.m. ET

Intervals Available*

Monday - Friday

9:00 a.m. – 8:00 p.m. ET

Special Servicing Requirements*

4 intervals (2 hours) serviced on Monday OR Friday

Most Intervals Available*

Monday - Friday

11:00 a.m. – 6:00 p.m. ET

**Subject to change based on client needs*



**Servicing
Times
Available**



Intuit Lacerte | Customer Service and Inbound Renewal Support Customer Service & Inbound Sales

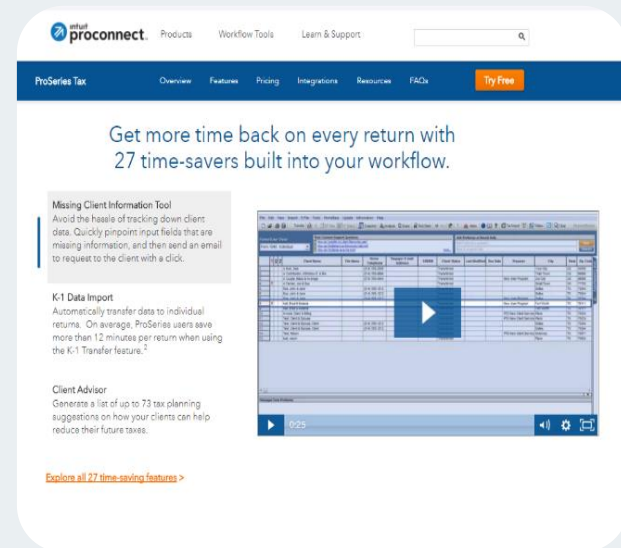


About the Client | Intuit Inc.

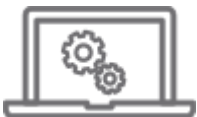


Intuit Inc. is an enterprise software company that develops financial and tax preparation software and related services for small businesses, accountants and individuals.

Intuit Proconnect Lacerte is an industry-leading professional tax software. Lacerte is designed to support large tax and accounting firms with individual and business clients. Call cent agents that support this program will be providing customer service and inbound renewal sales support to Lacerte customers via the phone.



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



System and 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
- 64-Bit Windows Operating System



Intuit Lacerte | Customer Service and Inbound Renewal Support Customer Service & Inbound Sales What to Expect When Servicing



What to Expect

- Provide high end, white glove support to very large CPA firms who do personal taxes for their clients.
- Interact with Lacerte users via phone, responding to customer service questions and/or renewal questions.
- Research, analyze and determine an appropriate course of action for Lacerte customers; recommend additional services and add-ons as applicable.
- Be a positive representative for Intuit and the Lacerte Group; take a caring and empathetic approach to customer interactions.
- Articulate how to use the Lacerte software product accurately and efficiently resolve customer inquires on the first contact.
- Provide quality customer service while demonstrating the ability to effectively troubleshoot and resolve inquires.
- Offer analytical and organized resolutions and find a sense of enjoyment in troubleshooting, critical thinking and problem solving.
- Secure the firm's commitment to renew the software



Capabilities of Top Performing Service Partners for this Program

- Experience providing white glove support to high end customer.
- Foundational technical skills and an understanding of how to use a computer and software.
- Experience in a goal oriented, fast-paced, changing environment.
- Ability to understand client needs, identify helpful resolutions, and recommend additional products and services and needed.
- Demonstrates 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.



Intuit Lacerte | Customer Service and Inbound Renewal Support Customer Service & Inbound Sales

CERTIFICATION DETAILS

Instructor-Led eLearning with Self-Paced Modules

In this phase:

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.

During this phase, Service Partners are required to service a minimum of 30 intervals (15 hours) per week as outlined in the certification SOW.

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

Certification Call-Taking Earn While You Learn!

In this phase:

An opportunity to apply what you've learned in Phase I to live chats, while earning revenue!

During the Certification SOW, Service Partners are required to service a minimum of 30 intervals (15 hours) per week, during times posted in Starmatic and as outlined in the SOW.

See Page 1 For Class Dates and Times

100% attendance in instructor-led sessions is highly encouraged for success



Intuit Lacerte | Customer Service and Inbound Renewal Support Customer Service & Inbound Sales CERTIFICATION DETAILS



Certification Completion Criteria

- Attend four-hour certification session
- Complete LMS Module with $\geq 85\%$
- 80% or greater on commitment adherence quiz
- Successfully pass mock call scenarios with the instructor
- Additional requirements may be provided by the course instructor
- Must pass 2 out of 3 in class call evaluations
- All learners must complete the Service Partner Security Awareness self-paced course and score 85% or higher on the assessment before the last day of class in order to be certified
- Pre-Assessment! Prior to enrolling, learners will be asked a series of questions to demonstrate aptitude in research, high-pressure situations, critical thinking, and more.



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.

Read complete course policies [here](#)

OPPORTUNITY ANNOUNCEMENT



THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK AND AFFIDAVIT OF IDENTIFICATION

You will be prompted to complete a background check during the enrollment process. Details on the type of background check and the requirements to pass it will be provided as you proceed through enrollment on the Arise® Portal.

- If a Service Partner does not pass the background check, the certification course fee will be refunded, minus a processing fee which will be displayed/visible before payment is made.
- If a course is paid for with a voucher, a voucher will be re-issued, minus a processing fee.
- Refunds will not be provided if the background check is not completed in a timely manner.

IMPORTANT INFORMATION REGARDING BACKGROUND CHECK DURING COVID-19 PANDEMIC

Due to certain courthouse closures during the COVID-19 pandemic, Arise may be unable to completely finalize your background check. However, in order to allow you to continue your enrollment process, if the portion of your background check that is able to be completed is clear, you will receive a PROVISIONAL pass. Once the courthouses reopen, we will finalize your background check. If any disqualifying criminal history is uncovered during this finalization process, you will be notified, and your company's SOW will be terminated. We are unsure at this time how long it will take to complete background checks. We apologize for any inconvenience this may cause your company.

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.

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.

AFFIDAVIT OF ID

A completed, 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
- To access the Affidavit of Identification form, log on to the portal, click on the AVA icon on the bottom right and select Affidavit Form.
- Make sure to follow all instructions and once completed, submit the form to AriseAffidavits@arise.com

OPPORTUNITY ANNOUNCEMENT

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: $\frac{[(\text{Serviced Minutes} + \text{Excused No Show Minutes}) / (\text{Selected Minutes} + \text{Released Lockdown Minutes})] \times 100}{}$ |
| Net Promoter survey 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. |
| 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. |
| Case Compliance | ≥ 80% | The number of cases opened and closed vs the number of calls handled. |
| 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 | ≥ 40 | Intervals Serviced | ≥ 40 |
| | | | | | 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 | |



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

All business's must ensure that their agents have a professional work environment, when in class and when servicing.

- 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 business DOES NOT QUALIFY to participate in this program if any of the following applies to the business 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

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.