

# OPPORTUNITY ANNOUNCEMENT



## ProSeries®

### Intuit ProSeries OneExperience

Tax Support & Tech Support



#### Service Revenue

#### Base Rate\*

**\$14.00 per hour\*\***

(\$7.00 per interval)

\*If rolling 30-day CA is <85%, revenue will decrease to \$12.00 per hour/\$6.00 per interval

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



#### Certification

#### Class Schedule

Phase I  
12/14/2020 - 12/31/2020

Phase II - Earn While You Learn!  
Live Call-Taking  
01/04/2021 – 01/08/2021

#### Class Times Offered

9:00 a.m. – 1:00 p.m. ET

2:00 p.m. – 6:00 p.m. ET

\*NO Class on 12/25, 12/31 & 1/1



#### Servicing Times Available

#### Intervals Available\*

Monday – Friday  
9:00 a.m. – 8:00 p.m. ET

#### Most Intervals Available\*

Monday – Friday  
11:00 a.m. – 7:00 p.m. ET

#### Special Servicing Requirements\*

4 intervals on Monday or Friday

\*Subject to change based on client needs

See Firsthand What A Call Is Like  
Watch Now!





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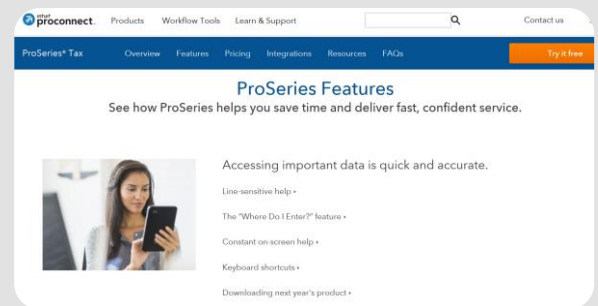
### Intuit ProSeries OneExperience

#### Customer Service & Tech Support

## About the Client | Intuit Inc.



Intuit is a mission-driven, global financial platform company that gives everyone the opportunity to prosper. With products like TurboTax, QuickBooks and Mint, they are using technology to build solutions to challenging financial problems for millions of people around the world. Watch a video about the various Intuit programs available on the Arise Platform [here](#).



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## 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
- I5 Processor (or AMD equivalent) required (i7 processor preferred)
- 4GB memory required, 8GB memory preferred
- Windows 8.1 64-bit or Windows 10 64-bit



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### **Intuit ProSeries OneExperience**

Customer Service & Tech Support

What to Expect When Servicing

#### **What to Expect**



- 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, tax 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 inquires related to software installation, reinstallation, entry, and other software support matters
- Provide quality customer service while demonstrating the ability to effectively troubleshoot and resolve inquires related to software installation, reinstallation, entry, calculation and other software support matters
- Provide caring, empathetic and white glove customer interactions that positively represent the Intuit ProSeries brand

#### **Capabilities of Top Performing Service Partners for this Program**



- 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.)



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### **Intuit ProSeries OneExperience**

Customer Service & Tech Support  
CERTIFICATION DETAILS

#### **Instructor-Led eLearning & Self-Paced Work**

##### **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 with service, tax support and technology issues.

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

#### **Earn While You Learn! Certification Live Call-Taking**

##### **This phase provides:**

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. Please review the Certification SOW for additional information, including the end date

**See Page 1 For Class Dates and Time(s)**

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



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### **Intuit ProSeries OneExperience** Customer Service & Tech Support CERTIFICATION DETAILS

#### **Certification Completion Criteria**

- 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
- 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

#### **Additional Information**

Due to constant changes in the tax industry, there will be frequent, primarily self-paced continuous certification on the program.

Service Partners will be given appropriate notice and time to complete continuous certification courses. These certifications are required to keep a Statement of Work in good standing.

### **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](#)



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### BACKGROUND CHECK

A background check will be prompted once you pay for the course. Details on the type of background check and the requirements to pass it will be provided before payment is made.

- 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
- Click on the link to access the Affidavit of Identification: [Affidavit of Identification](#)
- Once completed, submit this form to [AriseAffidavitOfIdentification@arise.com](mailto:AriseAffidavitOfIdentification@arise.com). When submitting the form, the Subject line must include the Client Program name and the CSP ID



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### 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: $\frac{[(\text{Serviced Minutes} + \text{Excused No Show Minutes}) / (\text{Selected Minutes} + \text{Released Lockdown Minutes})] \times 100$
Case Compliance	≥ 90%	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	≥ 40	Intervals Serviced	≥ 40
					Case Compliance	≥ 92 %
Incentive		.15		.30		.45



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### **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, free from any background noise, when in class and when servicing.

- To confirm a Service Partner intent to attend, Arise may be contacting agents 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. Service Partners are responsible for ensuring that their agents service all intervals that have been accepted in StarMatic®.

[See Sample Statement of Work](#)

### **A Service Partner 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%.

#### **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.

