

Opportunity at a Glance

Service Type: Customer Support & Data Entry

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Service Revenue

Base Rate

\$5.00 per interval
\$10.00 per interval



Certification

Course Duration

Phase I
12/27/2018 – 12/27/2018

Phase II
12/28/2018 – 12/28/2018

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
8:00 AM EST – 8:00 PM EST

Most Intervals Available*

Monday – Friday
11:00 AM EST – 6:00 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

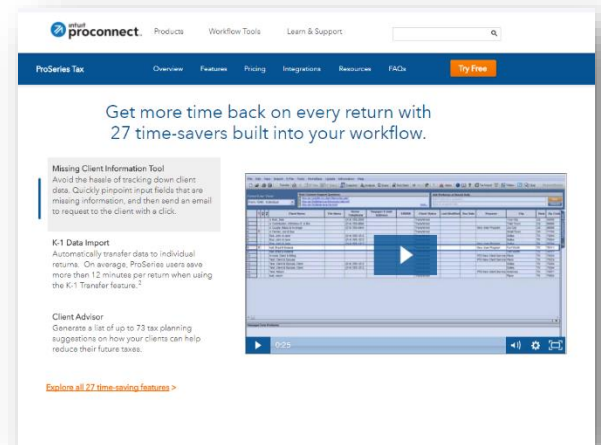
- A USB head set with phone quality audio will be required, examples include: Logitech h390 USB headset & Plantronics Model C320

Client Overview

Service Type: Customer Support & Data Entry

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 routing customers to the appropriate place to resolve their calls, including online resources or other departments.



What to Expect

Service Type: Customer Support & Data Entry

This program is a customer service program where agents will be providing real-time interactive voice response (IVR) services to ProSeries customers, transferring calls to appropriate workgroups.

- Calls will be between 30 seconds and 60 seconds.
- Call center agent will read scripting at opening of call and transfer to appropriate department.
- Once call is transferred, call center agent will document disposition via Quickbase form.

Capabilities of Top Performing Call Centers for this Program

- Displays patience, empathy, a unique ability to manage stress, the ability to work under pressure and adapt to adverse situations
- Provides knowledgeable, friendly and eloquent customer service
- A brand ambassador for the Intuit program
- Experience working with users to identify the best solution
- Strong typing and documentation skills
- Ability to express empathy and build strong customer connections on calls as short as 60 seconds



Certification Course Details

Service Type: Customer Support & Data Entry

Class Times Offered

Monday - Friday

9:00 AM – 1:00 PM ET
2:00 PM – 6:00 PM ET

Important! This course consists of 2 hours of instructor-led learning & up to 4 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

Phase II

Date:

12/27/2018

This course provides:

The ability to test systems so that learners can be certain they have access to all tools necessary.

Date:

12/28/2018

This course provides:

Opportunity for learners to understand the Intuit ProSeries Amazon system and obtain guidelines on how to identify workgroups to which they will be transferring calls.

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.

Certification Completion Criteria

- Attend four-hour certification session
- Complete LMS Module with ≥85%
- 80% or greater on commitment adherence quiz
- Additional requirements may be provided by the course instructor

Enrollment Prerequisites

Service Type: Customer Service & Data Entry

**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.

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: Customer Support & Data Entry

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: $\frac{[(\text{Serviced Minutes} + \text{Excused No Show Minutes}) / (\text{Selected Minutes} + \text{Released Lockdown Minutes})] \times 100$
Average Handle Time (AHT) %	<60 seconds	% of time an agent is able to stay within the target AHT of less than 60 seconds
Case Completion	>95%	% of time a call is successfully transferred to the correct unit

Additional Information

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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.

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.