OPPORTUNITY ANNOUNCEMENT

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Intuit QuickBooks
Customer & Product Support

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
06/28/2021 – 07/29/2021

Phase II
07/30/2021 – 08/19/2021

Note: No class on 07/05/2021

Class Times Offered

Monday – Friday
9:00 a.m. – 1:00 p.m. ET

2:00 p.m. – 6:00 p.m. ET

5:00 p.m. – 9:00 p.m. ET

Servicing Times Available

Intervals Available*
Monday – Friday
9:00 a.m. – 9:00 p.m. ET

Special Servicing Requirements*
6 Intervals (3 hours) required on Mondays

Most Intervals Available
Monday – Friday
9:00 a.m. – 3:00 p.m. ET

Subject to change based on client needs

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Intuit QuickBooks
Customer & Product Support

About the Client | Intuit Inc.

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

Intuit QuickBooks

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.

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

- OS, hardware, network
- Current OS patches (last 15 days)
- Anti-malware solution with current definitions (15 days)
- Active firewall
- Global Protect 5.0.2
- 1Mbs/expert network bandwidth for brick & mortar locations
- 250ms maximum RTT latency (less than 150ms recommended) to AWS Connect in

Intuit QuickBooks
What to Expect When Servicing

What to Expect

On a day-to-day basis, Service Partners 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. This includes having a thorough understanding of Intuit's suite of products and educating customers on those that best meet their needs.

- 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 Service Partners 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

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CERTIFICATION DETAILS

Instructor-led content, eLearning & Self-Paced Work

This phase is:

An overview of tools, knowledge, resources and practice call-time necessary to use client systems and provide quality service to client customers. This course requires strong attention to detail, lengthy periods of intense concentration, and a great deal of learner involvement and class participation

- 23 days in length: Four hours of instructor led content per day and up to two hours of self paced content daily.

Certification Call-Taking
Earn While You Learn!

This phase provides:

Live call handling during designated class times of approximately 40 intervals (20 hours) of service per week including one of daily call calibration or debrief

- Opportunity for learners to apply all that was learned in Phase I on live calls, while earning revenue and continuing to participate in instructor led session and self-paced content to expand understanding of client program.

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

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CERTIFICATION DETAILS

Certification Completion Criteria

- 100% completion of daily self-paced modules each day as well as complete attendance of instructor-led sessions each day

- Completion of all assessments and knowledge checks with a score of greater than or equal to 80%

- Successful completion of all call simulations at 90% or better

- Successfully handle live customer calls by demonstrating proven customer service skills

- Completion of servicing time as indicated above with a 90% Commitment Adherence

- Minimum of 80% attainment of client metrics compared to target

- Minimum servicing of 30 intervals (15 hours) weekly with 90% Commitment Adherence

- Minimum of 90% attainment of client metrics compared to target

- 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

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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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.

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- You will be prompted to complete a background check during the enrollment process - if you have not completed one within six months of the class start date.

- 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.

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 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.

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

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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: [(Serviced Minutes + Excused No Show Minutes) / (Selected Minutes + Released Lockdown Minutes)]x100
Net Promoter survey Score (NPS)	≥ 70%	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.
Transfer Rate	≤ 8%	% of calls transferred to other departments

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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, when in class and when servicing.

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

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 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.

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