

Question

Soft Skills

1

Uses proper greeting

CUSTOMER CALL: Hello, this is [NAME] and I am calling from [COMPANY]....

VET CLINIC CALL: Hello, this is [NAME], a customer service representative with [NAME]....

2

Displays Professionalism

Uses pleasant, modulated tone: Engages the customer with a polite demeanor and avoids sounding indifferent or monotone.

Matches pace: Matches the pace of the customer.

Displays confidence.: Even if agent does not have the answer or cannot provide an immediate resolution, agent displays confidence that the issue will be resolved

3

Displays empathy and responds appropriately

Responds to the customer's situation appropriately

Responds with the appropriate level of empathy

Displays a sense of urgency

Apologizes as needed

Uses appropriate apology statement(s): Apologizes to a customer using the appropriate language to convey the severity of the issue that occurred. IE: a customer receiving medication an hour after the expected delivery time is an inconvenience. A customer's order being wrong and their pet missing a dosage of a necessary medication is more serious.

Uses positive rather than negative statement(s)

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4

Uses appropriate call close

A proper call close thanks the call recipient for their assistance, brands the call and wishes them well.

IE: "Thank you for your assistance [name], have a great day."

Systems and Procedures

5

Outbound customer call procedures followed

Appropriate notes placed in customer account.

Appropriately updates customer account (excluding Rx card, see Q7).

Appropriately sends escalation email.

Takes ownership: Even if agent does not have the answer or cannot provide an immediate resolution, agent takes ownership and ensures the issue will be resolved.

Follows outbound call timeframes.

6

Outbound Vet clinic call procedures followed

Appropriate notes placed in customer account.

Appropriately updates customer account (excluding Rx card, see Q7).

Appropriately requests VA, when applicable.

Recognizes decline and follows SOPs.

Takes ownership: Even if agent does not have the answer or cannot provide an immediate resolution, agent takes ownership and ensures the issue will be resolved.

Follows outbound call timeframes.

Contacts customer when appropriate.

Sends Fax/Email as required

7

Rx Card properly updated

All attempts should be noted on the Rx card. You should note what contact attempts were made (i.e.: 8/15/2018 BSmith 1st attempt. Attempted to contact vet, no answer. Attempted to call client, left vm).

Place notes in proper format: 1/1/19 Agent name, authorization attached . This is separate from including information that is referencing medical information (illegal notation).

When an order is moved to pending cancellation, a note must be placed on the Rx Card, there is no need to contact the client again as they will be notified by e-mail.

Updates Rx Card to mail-in-Rx/I want [COMPANY] to contact my vet.

Appropriately updates Vet information, when applicable

show more

8

Agent attempts to retain customer if they request to cancel the order

Attempt to retain the customer. If they are an autoship customer offer a 10% discount off the order for the delay. If they accept, email csall@allivet.com to add the discount.

9

Dispositions call correctly

Agent should disposition each call with the appropriate purpose of the call.

*IE. If client call is because the AS did not generate and agent places an order; the disposition is Autoship Issue, **not** Place Order.*

10

Makes it effortless for customer or vet representative

Avoids unnecessary steps for the customer or vet representatvie

Does not place unnecessary barriers in front of them to make a resolution more difficult

Provides all necessary information to facilitate an easier/faster resolution, i.e. fax number, offer to re-send fax/email

11

Provides accurate information to the caller or recipient

All information provided should be accurate to the best ability of the agent.

All vital information must be provided.

IE: If a client calls in and requests an autoship but the agent does not specify that the credit card must be saved to the account or does not do so, the order will not generate and the client will call back to inquire as to why the order was not placed.

Auto Fail

12

Rx Approved

All items listed below must be stated and recorded on the call.

I.E. This is [Rep's full name] a customer service representative I would like to inform you this call will be recorded for the pharmacist to review. This approval is for our client [Client name], For their [pet species, name]. I have [pet name] weighing at 46 pounds. Is this information correct? [always verify weight] The owner is requesting [Medication, dosage, quantity] [always confirm DRUG & QTY]. Will there be any refills? [if they say Yes for refills, verify how many]. Are there any directions? Who is the authorizing veterinarian? And to verify the office phone number, I have XXX-XXX-XXXX. May I have your name?

Rx Approved: Calling from [COMPANY]

Rx Approved: Recording script

Rx Approved: Customer name

Rx Approved: Pet species, Pet name(s)

Rx Approved: Weight verification

Rx Approved: Item name

Rx Approved: Item strength

Rx Approved: Quantity

Rx Approved: Refills

Rx Approved: Directions

Rx Approved: Authorizing Vet

Rx Approved: Name of person spoken to

Rx Approved: Office number

show more

13

Rx Declined

All items listed below must be stated and recorded on the call. While not mandatory, asking them in this order is preferred:

Name of agent/position

Calling from

Recording script

Customer name

Pet name(s)

Reason

I.e.: This is [Jane Doe] a customer service representative I would like to inform you this call will be recorded for the pharmacist to review. This is a declined prescription for [John Smith], For their pet [Daisy]. Any specific reason? Is there anything else I can help you with?

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14

Recording

Recording attached

Correct recording attached

Recording must be complete

Recording must be audible

15

Rude or condescending

Representative is rude, combative, sarcastic or talks down to the customer. Rude behavior can range from blatant indifference to the use of foul or inappropriate language.

16

Attempt to decipher verbal Rx

The representative questions the Rx:

Dosage

Weight

Etc.

17

Represents self as other than CSR

Allows Vet to think CSR is other than a customer service agent.

18

Enters notes in Rx card that reference medical information or unnecessary narrative

Notes will be in Rx format and will not contain any medical or unnecessary information.

Acceptable: 11/22/3333 Name 1st Attempt Spoke to Vet Rep, resent fax request.

Unacceptable: 11/22/3333 Name 1st Attempt Spoke to Vet Rep, advised they will not approve Heartgard; Client needs to order Heartgard Plus. (THIS CAN GO IN THE CUSTOMER CARD BUT NOT RX CARD).

19

Fails to follow through

20

Refused to escalate call

The representative blatantly refused a manager to the customer.

21

Agent fails to send (or sends when not applicable or appropriate) Incident/Adverse Reaction reports/emails

Adverse reaction: When client advises of negative reaction (i.e. vomiting, fever, etc); agent must follow the proper guidelines and ensure that customer is referred to the pharmacy dept (during normal business hours) and that the proper email is sent to ani@allivet.com, cc rx@allivet.com outside of pharmacy business hours.

Incident Report: If a client receives a prescription item other than what they ordered, or they receive a quantity different from what they ordered we must notify the pharmacy via email to rxhelp@allivet.com (and must include all the information mentioned in the CS Policy & Procedures guidelines).