

Scorecard: Chat Scorecard Global-Copy (Chat)

Question

Analyze and Resolve

1 Correctly identifies issue/question

Determine the real reason the customer is reaching out.

IE: Is it because the order arrived late or because we did not apologize?

- *Allows customer to fully explain issue*
 - *Correctly identifies issue*
 - *Uses appropriate open/close probing questions*
 - *Responds back with brief synopsis*
 - *Appropriately thanks customer when they provide information*
 - *Does not cause the customer to have to repeat themselves*
 - *Does not place unnecessary barriers in front of the client by having them take pictures when not needed*
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2 Displays empathy and responds appropriately

Responds to the customer's situation appropriately.

- *Responds with the appropriate level of empathy. Too much or too little will only escalate the situation.*
 - *Uses appropriate apology statement(s): Apologizes to a customer using the appropriate language to convey the severity of the issue that occurred. I.E.,*
 - *A customer receiving medication an hour after the expected delivery time is a delay.*
 - *A customer's order being wrong and their pet missing a dosage of a necessary medication is more serious.*
 - *Use of the word "inconvenience" would be inappropriate in this scenario.*
 - *Displays a sense of urgency, as appropriate.*
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3 Provides accurate information to the customer

- *All information provided should be accurate to the best ability of the agent.*
- *All vital information must be provided, including, but not limited to:*
- *Processing and shipping timeframes:*
- *I.E., Please keep in mind that there is a 24-48 business hour processing time to fill and prepare your order after we receive the Vet's approval. Then it will ship.*

4 Makes attempt to retain customer

If a customer wishes to cancel an order and does not state that the pet is deceased, we should uncover the reason for the cancellation and attempt to save the order

5 Takes ownership of interaction and provides the proper resolution

Takes ownership

- *The representative should let the customer know they will be the person to fix the issue and demonstrate the ability to do so. If they cannot handle it directly, they need to let the customer know how it will be handled and they need to follow up to ensure it is resolved.*

De-escalates customer appropriately/Does not escalate the customer

- *If a customer is initially agitated or shows signs of agitation, the representative is able to calm the customer down and address their concern. The representative should avoid doing things to intentionally agitate a customer while on the chat.*

Resolves

- *The representative should do everything within reason to make the situation right and ensure the customer is satisfied. Resolution being provided should adequately attempt to resolve the customer's issue/ situation.*
- *If the customer is waiting for an approval for over 24 hours or has an urgent need, the agent offers to have us contact the vet for the approval.*
- *Offers the proper discount or to waive/expedite shipping to satisfy the customer*
- *Advises that the action was taken and why.*
- *Communicates next steps*

System and Procedures

6 Timely representative responses Proper use of predefined responses/ Relevant links sent Logical and coherent flow

Timely representative responses

- *Let customer know what you are doing before going silent.*
- *Ensure you respond back to customer under 2 minutes.*

Proper use of predefined responses/ Relevant links sent

- *Ensure that the correct predefined response is used and correlates to the question raised.*
- *If a situation cannot be resolved immediately, the representative should clearly lay out next steps to the customer. This should include when the customer can expect a follow up.*

Logical and coherent flow

- *Ensure you are answering each question that was raised and in the correct order.*

7 Uses customer/pet names appropriately

Uses the customer's name throughout the interaction and when referring to Rx medication they should use the pet's name.

IE: "Thank you for your patience John, we will have Sparky's Bravecto shipped out today."

- *Chatter's name - if provided and as appropriate.*
 - *Pet's name - when placing or updating order and as appropriate and:*
 - *ALWAYS IF PET DECEASED*
 - *If no name is provided, it is appropriate to ask their name to confirm the account is correct or ask to whom you are chatting with, but not required.*
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8 Proper Chat close

- *Representative should ask if the client needs anything else before closing the chat.*
 - *A proper chat close thanks the client for their inquiry, brands the chat and wishes them well.*
 - *IE: "Thank you for contacting [LOB], [customer name], have a great day."*
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9 WRITING MECHANICS: Spelling and Grammar

Ensure the use of proper spelling and punctuation. Refer to Grammarly when applicable.

- *No spelling or grammar errors*
 - *One spelling or grammar error*
 - *Two spelling or grammar errors*
 - *More than two spelling or grammar errors.*
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10 Updates account/order appropriately

All information should be input accurately and in the proper location.

- *If Autoship is converted, agent ensures that all information for the Autoship is set up correctly. Including:*
- *Correct item and quantity. If medication, correct strength (MG) or form (tablets versus capsules)*
- *Frequency and date - intervals requested and provides next Autoship date*
- *Adds pet name as well as Vet information or "I will mail in my Rx" correctly*
- *Enters any agreed-upon pricing (if applicable)*

11 Notates the customer account

Notes customer's account must always be placed and should include:

- *Name of person responding to*
 - *Narrative of interaction*
 - *Narrative of resolution*
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12 Dispositions Chat appropriately (Tag)

Agent should disposition each chat with the appropriate tag.

IE. : If client calls because the AS did not generate and agent places an order; the disposition is AutoShip Issue, not Place Order.

Auto Fail

13 Was rude or condescending to the customer

Representative uses rude, combative, sarcastic, condescending words or phrases.

IE: Blatant indifference to inappropriate language.

14 Jeopardized the health of the pet

The representative failed to act on the urgent need of a pet when expressed by the client.

IE: Reshipped a lost package ground and does not offer complimentary overnight shipping when the client said they only had two doses left.

15 Refused to escalate Chat

The representative blatantly refused a manager to the customer.

16 Failed to follow through

Advised the client they would take an action and failed to do so.

- *Follows up with customer if promised*
- *Reviews account to make sure issue(s) resolved*

17 Provided medical advice to the customer

Recommended a product to the customer, advised them they could substitute one product for another or made a claim as to the efficacy of the medication.

18 Solicited full credit card number over chat

19 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).*
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