Scorecard: In-bound Calls Scorecard Global-2022 (Phone Call)

Question

Soft Skills

1   Greeting, Call close/Recap.

Uses proper greeting script:

Thank you for calling Customer Service, my name is [AGENT]. May I have your name, please?

Hello [NAME], how can I help you today?

It will be my pleasure to assist you with [ISSUE].

Uses proper call close and properly recaps:

Representative should ask if the client needs anything else before the close of the call.

A proper call close thanks the caller for their business, brands the call and wishes them well.

IE: "Thank you for doing business with [Company Name], [customer name], have a great day."

Call Recap

The representative should provide a quick recap of what was done for the client on the call:

- *Recaps order placed by agent*
- *Recaps pricing, discounts, refunds*
- *Recaps brief summary of next steps required*
- *Recaps other actions taken on behalf of customer*

2   Proper tone and manner
Hold/ silence etiquette
Appropriate use of customer/pet names

Engages the customer with a polite demeanor and avoids sounding indifferent or monotone.

- *Uses pleasant, modulated tone*
- *Matches pace*
- *Displays confidence*

Uses proper hold/silence etiquette

- *Asks the customer if they may place them on hold along with the reason for doing so. Upon coming back to the call, thank them for holding. No longer 2 minutes per hold.*
- *When not putting customer on hold, but looking into account, etc., let the customer know what you are doing before going silent.*

Appropriate use of customer/pet names

- *Uses the customer's name appropriately throughout the call and when referring to medication they should use the pet's name. IE: "Thank you for holding John, we will have Sparky's Bravecto shipped out today."*
- *Pet's name - when placing, changing order, verifying Rx and when appropriate. ALWAYS IF PET DECEASED*

Listen and Resolve

3 Uses active listening techniques and makes it effortless for customer.

- *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*

4 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. 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*

5 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.

6 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 during the call.*
- *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 on the call, 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 call.*

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*

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7   Locates and verifies customer account efficiently
    Verifies Billing address and shipping address if needed

- *Agent will verify if client has existing account (offer to create, where applicable)*
- *Agent locates the customer's account quickly without making them repeat information unnecessarily.*
- *Agent must verify (ensure customer provides) both the telephone number and email address (billing address or Order Number can be used as a substitute if the customer cannot provide one of the first two).*
- *When a customer places an order; agent must confirm the customer's full billing address and ask them if they will be shipping to a different address, if so, they need to verify it as well.*
- *When a customer places an order; agent must confirm the customer's full shipping address.*

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8   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)*

9   Notates customer account

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

- *Name of person responding to*
- *Narrative of interaction*
- *Narrative of resolution*
- *Complete notes*

10   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.*

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11   Dispositions call correctly

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

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

- *Agent should Include CUST ID # in Additional Disposition Field in InContact.*

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12   Escalates call when customer requests manager/ Escalates issue appropriately

Agent recognizes when to refer clients/ orders to the escalations and pharmacy teams.

- *Agent escalates the matter via email when appropriate and uses the approved channels: RXALL or CSALL*

When a customer requests a manager, we follow the proper guidelines:

- *At the very beginning of the call, we should make a sincere offer to help and offer to provide a manager at the end of the call, if necessary. If they still would like a manager, we follow the proper escalation guidelines*
- *Once a call has commenced and a customer would like a manager, we should get one for them in accordance with guidelines.*

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13   Appropriately masks credit card information

Masks when customer provides credit card information but ensures to remove mask for remainder of the call.

AutoShip

14   Offers new Autoship

Agent will recognize the clues that customer is a good candidate for Autoship and offer accordingly.

- *My pet will be taking this medication for life*
- *I have to keep calling every month to reorder*
- *I need to place a refill order*
- *Too expensive*

15   Converts Autoship

Autoship is offered and accepted by the customer.

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16   Attempts to retain existing Autoship

Agent will address customer concerns so they may continue with the Autoship program.

Ask the reason for cancellation and provide options relative to the customer issue.

- *Too much*
- *Cheaper elsewhere*
- *Price keeps going up/changing*
- *No longer taking this Rx, on something else*

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17   Successfully retains existing Autoship

Agent addresses customer concerns and makes appropriate offers to retain customer in the Autoship program.

- *Change frequency*
- *Price match*
- *Lock price*
- *No longer taking this Rx, vet has put pet on something else – offer to put that on AS*

Auto Fail

18   Was rude or condescending to the customer

Representative uses rude, combative, sarcastic, condescending words or phrases (IE: Blatant indifference to inappropriate language).

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19   Call Avoidance

Representative fails to make themself readily available for the next call, (I.E., Stays on the line longer than necessary to avoid going into ACW or the next call.)

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20   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*

21   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.

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22   Refused to escalate a call.

The representative blatantly refused a manager to the customer.

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23   Failed to mask credit card

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24   Provided medical advice to a 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.

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25   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).*