Scorecard: Ticket Scorecard Global-Copy

Analyze and Resolve

1   Correctly identifies issue/question and makes it effortless

   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*
   - *Unrelated additional interactions should be addressed in question 8.*

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.*

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 before the order ships.*

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 the customer.*

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.*

Email Mechanics

6   Proper Macro Used and Response Correlates to Issue(s)

- *Proper macro used: if a macro exists that should be used to respond to the client, the agent selects the macro available.*
- *Proper revision of macro:*
- *Ensure all [......] are edited appropriately, including customer name*

Response correlates to issue:

- *All issues mentioned by customer are addressed*
- *Offers appropriate discount, refund or shipping waiver*
- *States actions taken on behalf of customer*
- *Communicates next steps*
- *Offers to assist with additional issues*

7   EMAIL: Proper use of Client/ Pet Name

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 contacting us today John, we will have Sparky's Bravecto shipped out today."

Client's name: As referenced in their email if available, or on the customer's account. Do not use the email address as their name.

Pet's name - when placing or updating order/Autoship and as appropriate and:

ALWAYS IF PET DECEASED

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8   Proper response to unrelated additional customer inquiries

If customer responds with and issue unrelated to the first interaction, ensure that:

- *Proper macro used*
- *Proper revision of macro. I.E. inserting proper medication, dates, etc.*
- *Responds with appropriate level of empathy and or apology*
- *De-escalates customer*
- *Provides accurate information*
- *Provides proper resolution*

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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.*

Systems

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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 ticket appropriately (Tag)

Agent should disposition each ticket with the appropriate tag.

Agent should enter the order # and/or the CUST ID

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

Autoship

13   Offers Autoship when appropriate

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 contacting to you every month to reorder*
- *I need to place a refill order*
- *Too expensive*

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14   Converts Autoship

Autoship is offered and accepted by the customer.

Auto Fail

15   Was rude or condescending to the customer

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

IE: Blatant indifference to inappropriate language.

16   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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17   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*

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18   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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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).*