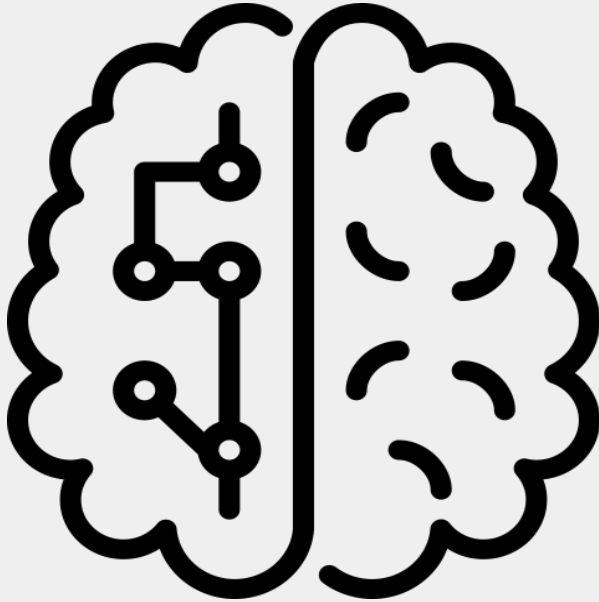
An aerial photograph of a small, rocky island in the middle of a vast, deep blue ocean. The water is turbulent, with white foam from waves crashing against the island and creating a large wake. The text 'QA Guidelines' is overlaid in a bright yellow, bold, sans-serif font on the left side of the image.

QA Guidelines

**We want you to have the freedom to
truly help our customers.**

The QA Transformation

Competencies



What are competencies?

Competencies are observable core skills needed to create a meaningful and successful customer interaction.



**Interaction
Components**

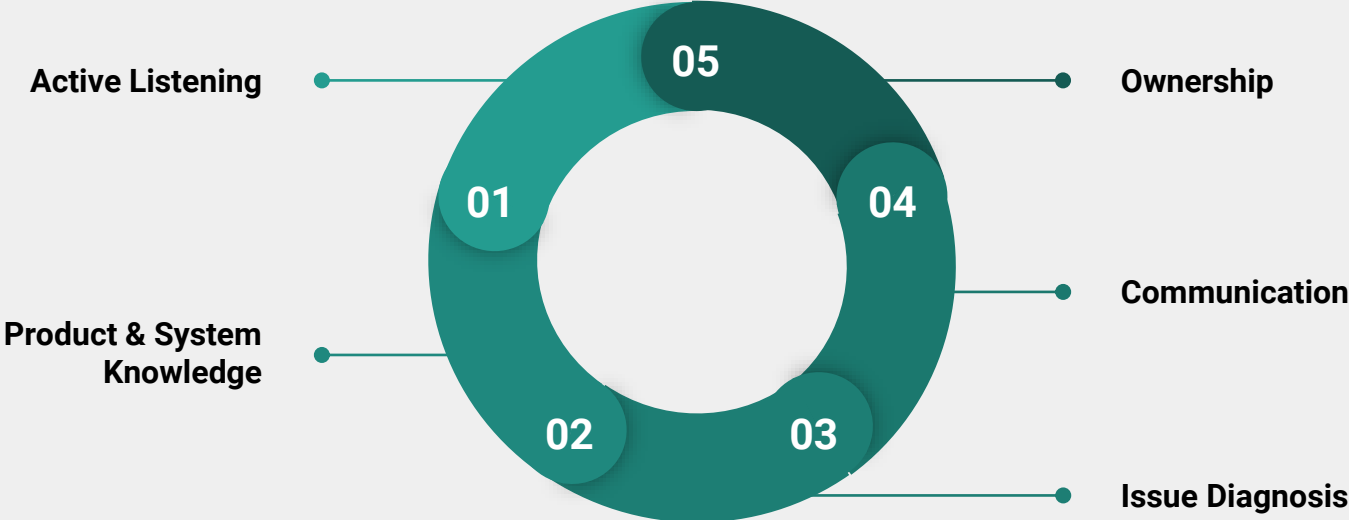


**Procedural
Compliance**



Auto-Fails

The Five Competencies



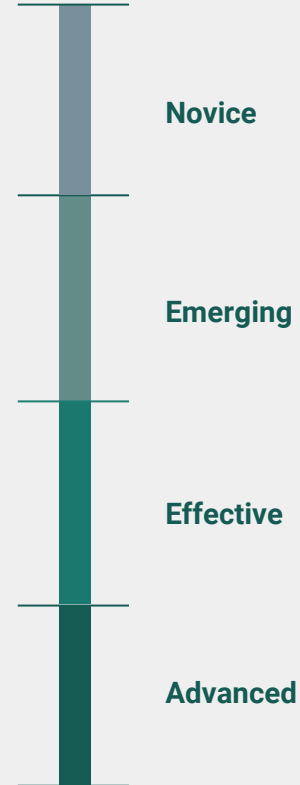
Value Positioning is an additional competency for STS & Acquisition

Mastery Levels

What is a Mastery Level?

Each competency will be scored on it's Mastery Level - the level of ability that an Advocate demonstrates related to the particular competency.

For each competency, you'll be assessed as either Novice, Emerging, Effective, or Advanced.



Active Listening in Action

Definition

You are engaged and attentive.
You ask clarifying questions
and show the customer that you understand their issue.
You display empathy wherever appropriate.



Active Listening is more than just *listening*.

To be Effective or Advanced in this competency, you should display clear indicators throughout your interaction. Let's review.

Novice

Emerging

Effective

Advanced

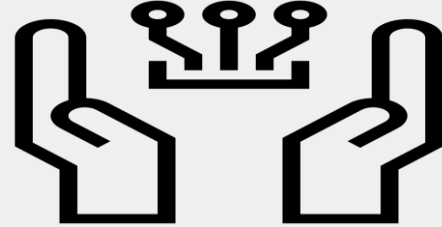
Effective	<ul style="list-style-type: none">• You rarely need to ask the customer to repeat information.• You accurately and concisely paraphrase the customer's words throughout the conversation to ensure mutual understanding.• You demonstrate patience throughout your interaction, allowing the customer to finish speaking before responding; you give appropriate and genuine verbal/written cues to show the customer you hear them.• You show genuine empathy for the customer's issue, acknowledging feelings displayed during the customers interaction.• You realize when the customer is confused and flex your communication style to better explain.
Advanced	<ul style="list-style-type: none">• You never need to ask the customer to repeat information• You create a two-way, collaborative conversation in which you and the customer are working together.• You are fully engaged and able to make sense of customer conversations by confirming, questioning, and summarizing throughout the interaction• You show genuine empathy, establish a connection with the customer and create trust and mutual understanding.• You realize when the customer is confused and flex your communication style accordingly, taking the time to make sure the customer is following when necessary.

Product & System Knowledge in Action

Definition

You utilize available tools to determine what is known about a customer and their situation.

You know what can and cannot be done in our systems and are up-to-date on products and offerings.



Product & System Knowledge is key in helping Advocates resolve customer inquiries.

To be Effective or Advanced in this competency, you should display clear indicators throughout your interaction. Let's review.

Novice

Emerging

Effective

Advanced

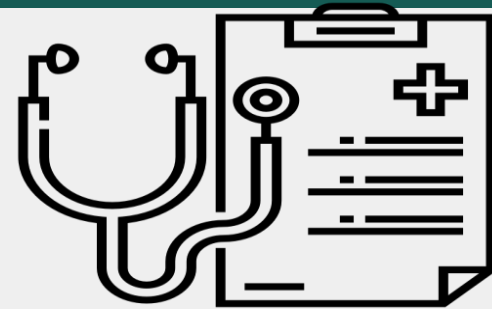
Effective

- You demonstrate a solid grasp of New York Times' products, services or tools.
- You effectively and accurately answer most product-specific questions without difficulty.
- For more complex questions, you adequately leverage tools at your disposal (e.g., knowledge base articles) or seek help from others.
- You see the information on the customer's account that is pertinent to the issue.

Advanced

- You are fully knowledgeable about the entire suite of products, services or tools offered by The New York Times.
- You are able to confidently answer any product-specific questions that come your way during the interaction.
- You leverage your understanding of The New York Times products to make recommendations to the customer beyond the information explicitly requested.
- You see not only pertinent information that is relevant to the interaction, but also other issues that could impact the customer going forward.

Issue Diagnosis Mastery Levels



Definition

You use what you know and what you learn during an interaction to identify the customer's issue and decide on a path forward.

Successful Issue Diagnosis is critical to getting a problem solved quickly and correctly.

To be Effective or Advanced in this competency, you should display clear indicators throughout your interaction. Let's review:

Effective	<ul style="list-style-type: none">• You apply what you know and what you heard from the customer to fully identify and address the customer's issue and related issues• You act on clues or needs that the customer has articulated.• You are familiar with common issue types and recognize them in the moment. You are becoming familiar with more complex topics.
Advanced	<ul style="list-style-type: none">• You apply what you know and what you heard from the customer to fully identify and address the customer's issue. You also address future issues that may arise.• You make suggestions to prevent recurrence of the customer's issue.• You're familiar with all common and most complex issue types and can recognize them in the moment.

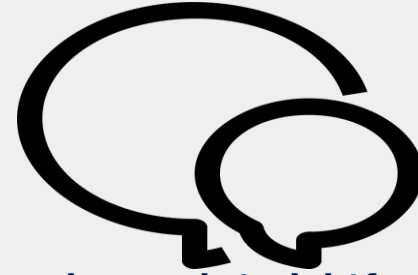
Novice

Emerging

Effective

Advanced

Communication Mastery Levels



Definition

You speak and write in a clear, logical and appropriate manner that fits the situation.

Good communication comes in many forms, but being clear and straightforward are foundational.

To be Effective or Advanced in this competency, you should display clear indicators throughout your interaction. Let's review.

Effective	<ul style="list-style-type: none">• You mostly speak or write concisely, clearly and logically and use good grammar to help the customer understand the issue.• You provide straightforward solutions to the customer and generally explain them at the level of detail needed for the situation.• You document customer's account with relevant details and clear context for future advocates.
Advanced	<ul style="list-style-type: none">• You always speak or write concisely, clearly and logically and use good grammar.• You provide straightforward solutions to the customer and clearly explain them in detail to ensure the customer understands.• You take note of any outstanding feedback indicating customer confusion and escalate or notate the account accordingly.

Novice

Emerging

Effective

Advanced

Ownership Mastery Levels



Definition

You display confidence and take responsibility for the resolution of a customer's issue.

Ownership is about making sure the customer knows you're invested in solving their problem.

To be Effective or Advanced in this competency, you should display clear indicators throughout your interaction. Let's review.

Effective	<ul style="list-style-type: none">• You let the customer know you are taking care of their issue and do so without being prompted.• You apply what you know to attempt to address the issue. When there are no other options, you transfer or escalate to the appropriate party, keeping the customer informed of the process.• You have a natural call flow and sound confident when speaking with customers.
Advanced	<ul style="list-style-type: none">• You let the customer know you are taking care of their issue and provide options to achieve resolution. You display persistence in driving towards a solution.• You apply what you know to attempt to address the issue. When there are no other options, you transfer or escalate to the appropriate party. You keep the customer informed on progress and provide detailed information as next steps emerge.• You consistently manage customer conversations to mutually beneficial outcomes.

Novice

Emerging

Effective

Advanced

Value Positioning (STS)



Definition

You attempt to convert the sale or save the account by using probing techniques, highlighting the benefits of keeping/taking the subscription and making appropriate offers.

Value Positioning is about thoughtfully saving a subscriber.

To be Effective or Advanced in this competency, you should display clear indicators throughout your interaction. Let's review.

Novice

Emerging

Effective

Advanced

Effective	<ul style="list-style-type: none">• You make a genuine and thoughtful attempt to save the subscriber. You probe to understand why the customer is cancelling and highlight benefits that match their interest.• You act on customer clues or needs and you're able to suggest alternative solutions that best suit their situation.• You make a genuine and thoughtful attempt to save the sale. You probe to understand why the customer is not subscribing and highlight benefits that match their interest.• You act on customer clues or needs and you're able to suggest alternative solutions that best suit their situation.
Advanced	<ul style="list-style-type: none">• You have a meaningful conversation with the subscriber to understand why they want to cancel and use alternative positioning skills to present counter offers or solutions that are most beneficial for the customer. You are persistent and display confidence when overcoming objections.• You have a meaningful conversation with the potential subscriber to understand why they do not want to subscribe and use alternative positioning skills to present counter offers or solutions that are most beneficial for the customer.• You are persistent and display confidence when overcoming objections

Interaction Components

Interaction Element	Former QA Requirement	QA Transformation	QA Transformation Examples
Greeting	Thank you for contacting The New York Times. This is _____. May I ask who I am speaking with?	Greet the caller with a friendly, upbeat tone. Remember you are the voice of The New York Times; you may be the only connection the subscriber has with us.	"Good morning! Thank you for calling The New York Times. This is _____. May I ask who I am speaking with?"
Verification	You must verify 2 pieces of information. The exception is for a delivery complaint where you need to verify the complete delivery address. On most calls, the caller provides his/her name so this is one piece of verification.	<p>No change.</p> <p>In addition, if the account is linked via Amazon Connect to Sugar and the name matches, you only need to verify the phone #, account # or email address.</p> <p>If the account is not linked via Amazon Connect to Sugar then you need to ask the subscriber for another piece of identifying information that will help you access the account.</p>	<p>If account is linked with Amazon Connect: "Hi Jon. I'm just confirming that the account # / phone # associated with your account is _____". Note that because name matches a contact in Sugar, that counts as a piece of verification.</p> <p>If account is not linked with AWS: "Hi Jon. In order to access your account can I have the account # or phone # associated with the account?" If it is a digital account then ask for the email address. Note that because the account is not linked, you need another piece of information to verify the account.</p>
Acknowledge Customer's Relationship	"Thank you for being a Saturday/Sunday home delivery subscriber." or "Thank you for being a basic digital subscriber."	You no longer need to mention the specific product. Genuinely acknowledge the subscriber's relationship with The New York Times. Make it conversational.	"Thanks for being a subscriber" or "We value your loyalty"

Interaction Components

Interaction Element	Former QA Requirement	QA Transformation	QA Transformation Examples
Drive to self service	"You can manage your account online, including vacation stops and more at myaccount.nytimes.com"	Drive to self service in a conversational manner and when it makes sense to do so. For example when you are entering the vacation stop or adding a CC.	"While I am processing your vacation suspension I wanted to let you know that in the future you can do it online or through our automated phone system. We also have a new convenient text feature where you can place a stop via text."
Offering Additional Assistance	"Is there anything else I can help you with?"	Make sure the customer understands that you want to confirm you have taken care of whatever they needed. You can customize this question as you see fit.	"Have I answered all of your questions today?" "Is there anything else I can help you with?"
Close	"Thank you for being the best part of The New York Times"	You are not restricted to using a specific close. To make it more personalized, relate the close to the reason for the call	Vacation: "Enjoy your vacation" General: "Thank You for calling The New York Times, enjoy your day/evening." Cancellation: "We hope to see you back again in the future."

Interaction Components

You guide the flow of an interaction in a natural manner to ensure an effortless experience for the customer.

	Needs Improvement	Effective
Greeting	You fail to open the interaction appropriately.	You open the interaction with a friendly tone, mentioning The New York Times, identifying yourself, and asking for the customer's name
Verification	You do not verify 2 pieces of information for verification or verify the complete address for a delivery issue.	You verify 2 pieces of information or verify the complete address for a delivery issue.
Acknowledge Customer's Relationship	You fail to acknowledge the customer's relationship with The New York Times.	You acknowledge the customer's relationship with The New York Times.
Drive to Self Service	You do not drive to self service or fail to tie the self service option to the reason for the contact.	You drive to self service and relate the self service option to the reason for the contact.
Offer Additional Assistance	You fail to ensure you have answered all the customer's questions.	You ensure you have answered all the customer's questions.
Close	You do not close the interaction appropriately.	You close the interaction appropriately, using a personalized approach.

Procedural Compliance

You complete all necessary documentation on the account and follow prescribed procedures.

Needs Improvement	Effective
You make mistakes documenting an interaction in a customer's account.	You accurately complete all necessary documentation based on the interaction.
You make errors while completing follow-up work that directly impacts the core reason for contact	You accurately complete follow-up work that directly impacts the reason for contact
You fail to create SRs when required.	You create SRs when required.
You fail to update account information when needed.	You update account information that is verified.
You do not follow prescribed policy or you make modifications that violate company policy.	You follow prescribed procedures such as vacation donation, offering promotions etc.
You fail to educate the customer on the full benefits of being a Times subscriber when applicable.	On non complaint calls, you Grow the Times by educating the customer on the full benefits of being a Times subscriber.

Zero Tolerance Behavior

The following aspects of an interaction will result in an automatic QA fail:

- Missed compliance elements.
- Negatively presented company / product / affiliates
- Used rude tone / profanity / abusive language / continual interruption of customer.
- Disconnected call without responding at any point.
- Disregarded data protection / formalities while processing payment.
- You verify 2 pieces of information or verify the complete address for a delivery issue.



Understanding Scoring

How will I be scored?

For each interaction, you'll be scored on each of the competencies on a scale of 1-4, depending on where you fall on the scale of Novice, Emerging, Effective, and Advanced.

For interactional components and procedural compliance, you'll be rated as "Needs Improvement" or "Effective".

**Competencies +
Interaction Components +
Procedural Compliance**

Thank you!