



UNIVERSAL AGENT CALL FLOW

OPENING & VERIFICATION



1. Provide the opening spiel and determine if the account auto-populates.

"Thank you for calling TiVo. My name is _____. May I have your name please?"

2. Did the account auto-populate?

Yes, the account auto-populates	No, the account did not auto-populate
<p>a. Verify the email address and get the caller's name.</p> <p>Note: Do not verify the phone number on file, it is given when the account populates.</p> <p>b. If the caller is unable to verify the email address on file, ask either of the following:</p> <ul style="list-style-type: none">Mailing AddressLast 4 of the TSNLast 4-digit of the CC	<p>a. Get the caller's name and phone number to search for the account.</p> <p>b. Once the account is found, verify the email address.</p> <p>c. If the caller is unable to verify either the email address or phone number, ask either of the following:</p> <ul style="list-style-type: none">Mailing AddressLast 4 of the TSNLast 4-digit of the CC

3. If there is no account found, assist the customer in creating an account.

See also **KDB 5120 Account Verification Process** for more information

REPEAT CONTACT VALIDATION



INVESTIGATE + ACKNOWLEDGE + EMPATHIZE + RESTATE + CAN DO ATTITUDE

- Review cases.
- Look for Account flags. (Account flags or Blocker Status usually are Fraud, Legal, and Handle with Care)

Did the customer contact us within 7 days?

- Non-Repeat Contacts**- No contacts to TiVo Support within 7 days.
- Repeat Contacts**- Repetitive or have made more contacts to TiVo Support within 7 days.

NO	<i>"I understand that you want help about (issue). I can help you with that."</i>
YES	<i>"I see that you contacted us (recently or earlier) about/ regarding _____. Are you contacting us about the same issue?"</i>



ASK THE RIGHT PROBING QUESTIONS



- Review case notes.
- Consider the steps that were taken on the previous contacts.
- Check the appropriate resources and tools to eliminate unnecessary probing questions.

Note: Do not leave Customer Account/s open. Close and X out before processing an eCommerce transaction to the new Customer Account.

While probing, deliver the following especially on sales orders: **(THIS IS VERBATIM.)**

"Please check with your cable provider to confirm they support CableCARDS and TiVo services."

Tool	Applicable Scenario	What to Check
Case History/ Autocase (Mandatory)	<ul style="list-style-type: none">All Scenarios	<ul style="list-style-type: none">Calls made within the past 30 days.Auto cases (For transactions made by the customer online.)
Chat History (Mandatory)	<ul style="list-style-type: none">All Scenarios	<ul style="list-style-type: none">Chats made within the past 30 days.
Service Contracts Tab	<ul style="list-style-type: none">Service State & Service State ErrorBilling DisputePlan & Contract Inquiry	<ul style="list-style-type: none">Service StateBilling HistoryStatus & Current Plan
Orders Tab/FedEx Website/USPS Website/Inquiry Edit	<ul style="list-style-type: none">RMAOrder Type/Order StatusShipping Status/Shipping Label	<ul style="list-style-type: none">RMAOrder StatusTracking Number
BSM/TSN Tool	<ul style="list-style-type: none">Transfer OwnershipOrder Type/Order StatusShipping Status/Shipping LabelNetworking issuesMissing Group info	<ul style="list-style-type: none">Last time the device was connected to the networkType of connection <p>Note: Do not use the BSM/TSN tool for billing disputes. Consult if needed.</p>
HAL-D	<ul style="list-style-type: none">All Lineup-related issues	<ul style="list-style-type: none">The providerChannel schedule and program details
Agent Store	<ul style="list-style-type: none">Warranty ItemsSales and Retention	<ul style="list-style-type: none">Warranty Items and Sales & Save plan/promotion.
Braintree	<ul style="list-style-type: none">All Billing scenarios	<ul style="list-style-type: none">Transaction History
My Account	<ul style="list-style-type: none">Online Account issues & walkthrough	<ul style="list-style-type: none">Log in to tivo.com/myaccount using the ibex login credentials.
Known Issues/ Outages/ Trends	<ul style="list-style-type: none">KOT scenarios	<ul style="list-style-type: none">Look for KOT Tab on the Service Console drop-down menu.
Chatter (Headlines Group)	<ul style="list-style-type: none">TiVo News & Updates	<ul style="list-style-type: none">Look for Chatter Tab on the Service Console drop-down menu.

RECAP & TEST FOR SATISFACTION



Recap

"I am glad we were able to resolve the _____ issue by _____."

"I am glad we were able to resolve the C130 issue by restarting the router."

"I am glad we were able to resolve the billing issue by updating your credit card information."

Test for Satisfaction/Resolution

"Have I resolved all your concerns today?"

Case Number & Article

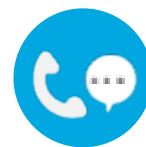
"I will be sending you an email with the case number and the link to the article that we used to resolve the issue today."

SELF-HELP OPTIONS



"For additional information about TiVo service or products, please visit our customer support website at tivo.com/support. To view and make changes to your account information, visit tivo.com/myaccount."

CLOSING



"We appreciate your loyalty. Again, my name is _____. Thank you for contacting TiVo. Have a great day!"



UA SALES & SAVES FUNNEL



If you are a Universal Agent, **ALL CALLS** are opportunities to make a **Sale** or **Save**. Follow the **UA Sales and Saves Funnel** to seal the deal.

SEAL THE DEAL!



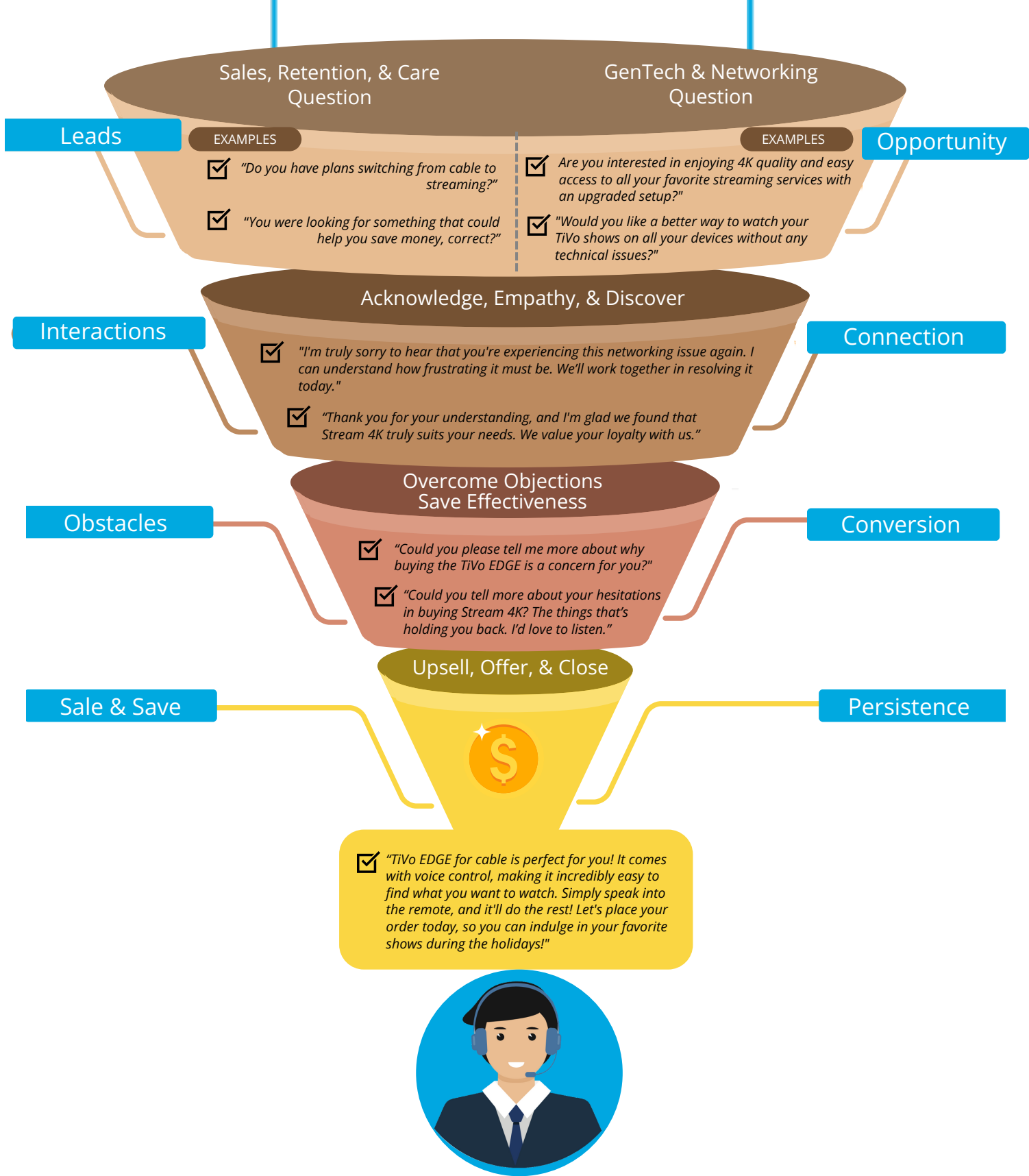
It's easy to follow the UA Sales and Saves Funnel!

- **Technical Support calls**, remember **O.C.C.P.** (Opportunity, Connection, Conversion, and Persistence)
- **Care, Sales, and Retention calls**, remember **L.I.O.S** (Leads, Interactions, Obstacles, and Sale & Save)



Care, Sales & Retention

Technical Support



CARE QUEUE



Customers are Sales and Save Conversion eligible.
This is an opportunity for you to turn the tables, pitch the solution you're providing, and seal the deal.

SALES QUEUE



Customers are **Sales** eligible.
This is an opportunity for you to pitch and be an expert to close a sale.

RETENTION QUEUE



Customers are **Sales** and **Save Conversion** eligible.
They are usually looking for promotions to keep their TiVo Service. This is an opportunity for you to match offers and make a sale.

TECHNICAL SUPPORT QUEUE



General Tech Queue:

Customers are **Sales** eligible. This is an opportunity for you to pitch a TiVo DVR upgrade or TiVo Stream 4K upsell.

Networking Queue:

Customers are **Sales** eligible. This is an opportunity for you to upsell TiVo Mini LUX for Multi-Room Viewing or Multi-Room Streaming.

