

CTI Procedure Job Aid

In an effort to increase the center's QA Performance here is a list of tips that can assist you in providing a positive customer experience.

The opening greeting has been modified, as described below.

You should begin each call by first asking the reason for the call by using the following greeting:

"Thank you for calling (Brand), this is (your name), how may I assist you today?"

If the call came in with CTI information, TAS should populate the customer's information in the Profile section. Proceed to validate the **last 4-digits of the phone number**.

The screenshot shows the TAS console interface. At the top, there's a navigation bar with tabs: Ticker, Console, Incoming Call (selected), Support, and Admin. A search bar contains 'ESN / MIN'. The main area displays a 'Service Profile' for a customer. The profile is organized into several sections: Serial Number (270113184013923697), Hex Serial Number, Part Number (TFLGL34CTMP), Technology (CDMA (3G)), Brand (TRACFONE), Sequence (0), Dealer (JUNKO ZABIEGALA), and Phone Status (ACTIVE). The SIM status is 5415219781, MSID is 5415219781, MIN Status is ACTIVE, Zip is 97402, and Carrier is 100328 VERIZON (O...). The Contact Name is 1234562444, Lid is 1234562444, Group Id is 55802009, Activation Date is 07/31/2016, Deact Date is 04/24/2017, Cards In Reserve is 0, and Service End Date is 04/24/2017. The Next Charge Date is 04/24/2017, Rate Plan is TFREVBULKTIER_NONEXP, Service Plan is 252, Service Type is Paygo, Triple Minutes, Auto-Refill is active, Next Refill Date is 04/24/2017, Warranty Exchanges are active, and Basic Warranty is active. The Current Throttle Status is SMAR, Device Type is SMAR, Leased to Finance is No, Lease Status is No, and Phone Gen is 3G. The load time is 7605413441325 ms.

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If TAS is blank then you may use the spiel below in order to access the customer's in form in TAS.

"May I have the phone number you are calling about?"

There are instances whereby the TAS will only populate the ESN proceed in having the customer validate the last 4 digits of the ESN after which a contact account needs to be created for the customer.

Device Profile

| | | | |
|---------------------|----------------------------|-------------|---------------------|
| Serial Number | 014350005589174 | SIM | 8901260865175455924 |
| Index Serial Number | | SIM | SIM NEW |
| Part Number | TFALA460GPKP5DG | Status | |
| Technology | GSM (4G) | MIN | |
| Brand | TRACFONE | MSID | |
| Sequence | 0 | MIN | |
| Dealer | 22420 DOLLAR GENERAL CO... | Status | |
| Phone | NEW | Zip | |
| | | Carrier | |
| | | Customer Id | 1256594050 |

Bare in mind also that the CTI Tool itself has its functionalities:

Making a Test Call

Placing your customer on hold/Reconnecting the customer

Transferring to another Dept. (Blind and Warm)

Conference a Call (Only when requested by Loss Prevention or Carrier)



Different Aux State

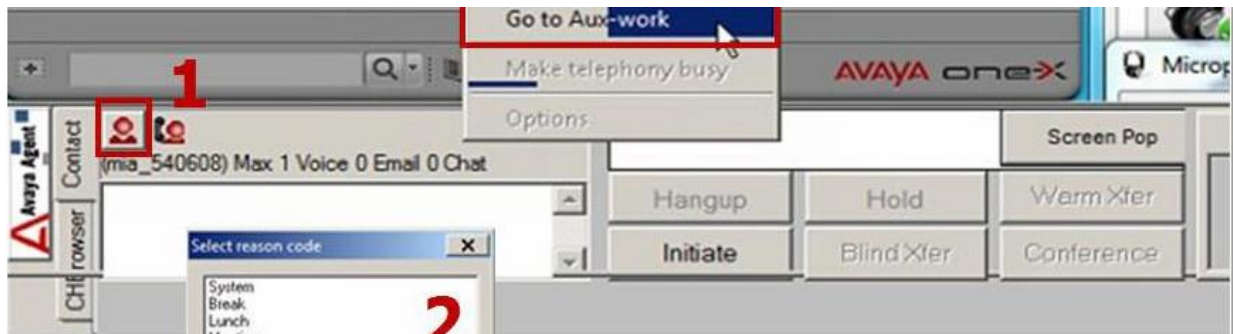
Aux Work:

This feature must be used to place your IC client in Aux for breaks, lunches, etc.

NOTE: To check your Aux status, refer to Impact 360 or your supervisor.

Follow the steps if you need to place yourself in Aux while on a call or change your Aux reason.

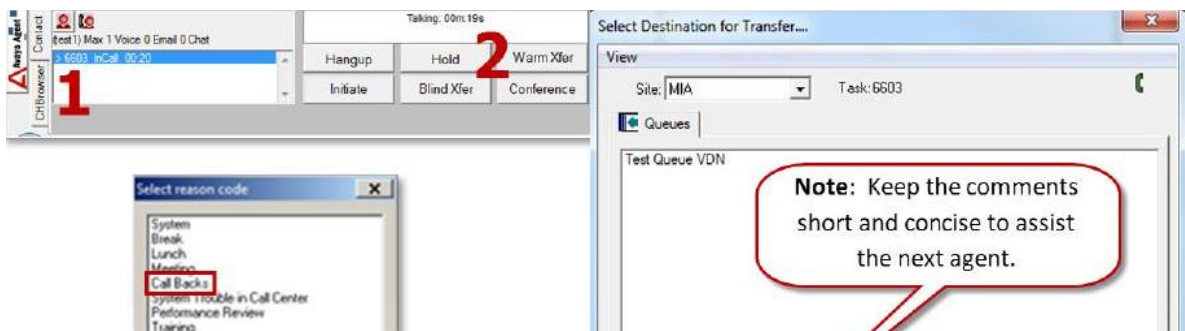
1. Right- click on the aux button then select 'Go To Work Mode'
2. The reason code list will appear. Make your selection.



Transferring Calls:

It is recommended that whenever transferring call a warm transfer should be done unless it is indicated otherwise based on the transfer guidelines.

1. Click the Aux button and then select
2. Next, from the Softphone Control section, click the designated button.
 - a. To Transfer select 'warm or blind' depending on the scenario
 - b. for outbound calls select 'initiate'
3. A popup window will appear, enter the appropriate extension or customer's contact info in the field then click ok.



Important Tips to Remember:

When your call is completed do not use the Avaya 1X if you need additional time to create an interaction.

When performing any transactions that requires you placing your customer on hold you need to use the CTI Tool in order to assist with the transactions

Note that failure to follow these guidelines will result in 20 points being deducted under the sub-section Adheres to Correct Process.