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| Rob: | I’m going to introduce the role first. I’m Robert Parker. You are Xinqi. Yunfei, he’s your company. This is Mingtao. He is the notes taker. |
|  | The meeting started at 21:09. |
| Rob: | I call this meeting regarding two queries. First is the customer complaint and the second is the conduct issue. We’ll go through the evidence. Do you have the copy? |
| Xinqi: | Yes. |
| Rob: | Before we look the customer phone call. Can I ask what’s your understanding regarding to customer service ethos? What sort of thing you generally do to help customer? |
| Xinqi: | The account is comprehensive. |
| Rob: | If the customer’s difficult to provide the information, what |
| Xinqi: | I tried to guide the customer to confirm the information in terms of providing service to the customer. It’s quite comprehensive. |
| Rob: | Has your supervisor or TL set any PDP relating to the customer service Ethos before? |
| Xinqi: | Yes. My next target is not to interrupt customer. Sometimes I said Ah to customer. |
| Rob: | Ryan asked you not to do ‘Ah..’. Why? |
| Xinqi: | Because it’s unprofessional. |
| Rob: | Is the POP or feedback in general? |
| Xinqi: | I cannot remember. |
| Rob: | Let’s see the customer’s call. We start from 07:37. At 08:14 of the call, you raise your voice. |
| Xinqi: | I didn’t. I listened back to the call. I used normal tone and voice. |
| Rob: | Did you raise voice in the call? |
| Xinqi: | I can’t remember. I was quite calm. Maybe I can’t hear the customer’s voice. |
| Rob: | If you look the transcript and the appendix 2, Ryan asked you why you have raised your voice on 08:14. |
| Xinqi: | The phone call single is not good. |
| Rob: | Did you raise your voice? |
| Xinqi: | Maybe yes, maybe not. But I didn’t raise the voice at 08:14. |
| Rob: | Is that right? |
| Xinqi: | I still remember the customer gave the wrong city name. I tried to lead the customer to give the correct city name. The customer’s quite moody. The customer said the city A is city B, and the customer suddenly raises voice. Do you have the geography knowledge? I didn’t have the geography knowledge. I tried to explain. The customer didn’t answer and said I want to make a complaint. |
| Rob: | You said the customer is moody and raise voice. How did it make you feel? |
| Xinqi: | I tried to calm him down and resolve the issue. |
| Rob: | What do you think his attitude change? |
| Xinqi: | Most of customers don’t know the PC issue. Because it’s comprehensive. They think it’s our responsibility. They didn’t want to spend time to confirm the information. |
| Rob: | Do you think it’s reasonable? |
| Xinqi: | I tried to explain to him to calm him down. |
| Rob: | 10:51 is the next part. This’s the part the customer wants to make a complaint. |
| Xinqi: | Before that, he clearly mentioned he want to make complaint. |
| Rob: | At 11:51, the customer said “Stop, I want to complain.” |
| Xinqi: | The customer didn’t want to solve the issue. He wanted to make a complaint. |
| Rob: | The customer said: “I know what you mean. Stop, I want to make a complaint.” Why did you try to resolve the issue by giving this information? |
| Xinqi: | What information? |
| Rob: | At 11:52, you said: “how about this, Mr \*\*\*, first I need to tell you our work procedure, because your account has safety issue, right now, you provide incorrect information, that’s why I need to confirm the account information with you. However, when confirming the address, due to the city name that you’re provided didn’t match to your account record, and then you told me you don’t want resolve this account issue, but want to complain me. Then follow our work procedure, I enquired my supervisor, then I ask you, you said you don’t want to carry on resolve your account query, you need to provide Scan ID to customer service email box. Mr.\*\*\*, can I ask did you hear and understand your account query yet?”. |
| Xinqi: | I can’t remember. I’m not sure the English version is exactly the same as what I said in Chinese. |
| Rob: | Do you think the call transcript is wrong? |
| Xinqi: | I won’t say it’s wrong. I just cannot remember. |
| Rob: | It might not be identical, but overall it follows the same conversation. |
| Xinqi: | Can you ask someone to listen to the call? |
| Rob: | I already did. |
| Rob: | Did you know the complaint procedure? What did you tell them? |
| Xinqi: | Refer it to TL or SUP. |
| Rob: | You don’t know what the procedure is? |
| Xinqi: | I’ve been told to refer it to TL or SUP. |
| Rob: | What is the complaint procedure? |
| Xinqi: | To send an email to us. |
| Rob: | What happen when you put him on hold? |
| Xinqi: | I refer it to TL: John Li (Hongjun Li). |
| Rob: | Did you tell John the customer wants to complain? |
| Xinqi: | John told me to ignore his temper, follow the procedure to confirm the full securities first. |
| Rob: | In the call you said: “when confirming the address, due to the city name that you’re provided didn’t match to your account record, and then you told me you don’t want resolve this account issue, but want to complain me.” Is that what you said? |
| Xinqi: | Yes, I think so. |
| Rob: | You said: “then follow our work procedure, I enquired my supervisor, then I ask you, you said you don’t want to carry on resolve your account query, you need to provide Scan ID to customer service email box.” Is that what you said or not? |
| Xinqi: | I tried to explain the issue to ask the customer to provide the Scan ID to carry on. I referred it to TL. The TL didn’t mention to ask the customer to send email to complain. So next time, if customer said I want to complain, I just asked them to send email at the first contact. |
| Rob: | Is the reason of you didn’t tell the customer the complaint procedure is because when you asked John what do I do to the customer, John didn’t tell you to do that? |
| Xinqi: | John didn’t mention about to ask the customer to send an email or not. So I just ask the customer to send Scan ID. Can ask a question? |
| Rob: | What is your question? |
| Xinqi: | So next time if customer wants to make complaint, should I just ask customer to send email at first place? |
| Rob: | The customer wants to make a complaint. He should be informed how to do it. Why is it matter if the customer cannot confirm full security? |
| Xinqi: | It’s hard to judge. |
| Rob: | Why did you not tell the customer the complain procedure? |
| Xinqi: | My TL didn’t mention it. |
| Rob: | Why did you not tell the customer the complaint procedure at the first place? |
| Xinqi: | The procedure is asking customer to send an email. But in real world, I normally refer it to TL or SUP first. |
| Rob: | Why is that? |
| Xinqi: | If customers are not happy with the settlement or bonus, we try to refer it to solve the issue at first contact. If TL clearly says the customer can carry on the complaint, I will give them the email. |
| Rob: | If TL didn’t tell you to tell the complaint procedure, you won’t tell the customer? |
| Xinqi: | I think so, that’s what I do. |
| Rob: | Let’s go to the misconduct issue with Ryan when doing the investigation meeting for the call. Appendix 3,4 and 5.  What’s your understanding the company policy of noise level? |
| Xinqi: | It’s difficult. |
| Rob: | We have the policy of noise level. How do you manage your voice in line with the policy? Do you raise your voice? |
| Xinqi: | Of course not. |
| Rob: | How did you raise to challenge the supervisor’s decision? |
| Xinqi: | The customer has very bad temper. It’s quite ridiculous, if the complain is valid. |
| Rob: | How did you raise it? |
| Xinqi: | I raise it in the room. |
| Rob: | Go to appendix 3 5.9, Ryan said: “the incident happened after the investigation meeting around 23:07. Xinqi asked me the date receiving the complaint on her desk. I confirmed for her the date is 25/07 the same day as the call time. At that moment, it is still normal. But after hearing the date, she turned to be aggressive and questioned why it took two weeks to start the investigation meeting. And whether it is proper.” Is it correct? |
| Xinqi: | It took two weeks to start the investigation. It’s the first situation. If the customer cannot confirm the security, can they make a complaint? Yunfei and I discuss these questions. |
| Rob: | Ryan said: “I only confirmed today is the day for the investigation meeting and did not want to discuss any other detail with her in the public. And then, Xinqi complaining in the public saying something like “not only customer can make a complaint, I can make a complaint as well. I can go to other department heads and go to HR as well.” After making such comment, Xinqi started to discuss something with Yunfei, which I cannot hear clearly as I have the other things to do. But her voice is loud.” |
| Xinqi: | I didn’t say that. |
| Rob: | Your voice is loud? |
| Xinqi: | When I got the complaint, I was in this account in account manager. I couldn’t find the escalation notes. I was looking the account manager. I discuss it with Yunfei based on account manager. |
| Rob: | Ryan asked you to bing down your voice as we have noisy policy, right? |
| Xinqi: | Ryan said “put your voice down’ to me. |
| Rob: | And you replied Ryan ‘do not use the policy to request me. If you want to discuss the policy, everyone got their own problem, let us see who will end up in the worst consequence.”. |
| Xinqi | When Ryan said ‘you know the noise policy’ to me, I was quite and watching the screen. After 10 minutes, some advisors chat quite loudly, then I asked Ryan ‘noise policy’. That’s it. |
| Rob: | Ryan said “Xinqi complaining in the public saying something like “not only customer can make a complaint, I can make a complain as well. I can go to other department heads and go to HR as well.” |
| Xinqi: | No. Ryan said I said all those words to Ryan? |
| Rob: | Yes. Go to the appendix 4. Yidan said “ I also heard you would like to raise a complaint to HR or the other department’s head. May I know what kind of complaint you would like to raise?“. Xinqi said: ‘I would like to raise a grievance complaint; I just feel that our team’s management do everything against me.” |
| Xinqi: | I just confused with the complaint. I said what is the meeting for? I was in puzzle. |
| Rob: | Did you mean it’s inaccurate? |
| Xinqi: | I have different opinion about the complaint. |
| Rob: | Is it accurately reflected in the meeting notes? |
| Xinqi: | No. |
| Rob: | What specifically point is not? |
| Xinqi: | From 1, 2,3,4…. Ryan said, you said, if you want to die? I didn’t say that. |
| Rob: | Which conversation is not accurate? |
| Xinqi: | It’s in different order. Ryan said I will go to HR? I said what? |
| Rob: | Ryan said you will complain to other department. |
| Xinqi: | I didn’t say that. |
| Rob: | Ok. Next line. Did you ask the question? |
| Xinqi: | Why the policy only against me? Ryan asked me to lower the noise level. But when someone was singing and chatting louder than me, I said ‘noise level’ to Ryan’. That’s it. |
| Rob: | Yidan asked you how your attitude when you talked to the supervisor. Your answer is I cannot recall it as it’s very short meeting. Yidan asked what do you think about supervisor’s attitude. Your answer is Ryan is aggressive. |
| Xinqi: | Yes. |
| Rob: | You asked Ryan the date of the complaint received. What did you do? |
| Xinqi: | I looked at the screen to check account in account manager. |
| Rob: | You were discussing it with Yunfei? |
| Xinqi: | Yes. |
|  | The meeting was paused at 10:16, as Yunfei asked for a break. |
|  | Meeting back at 10:17 |
| Rob: | Finally, the third statement. The 4th line, ‘Ryan’s attitude is normal, but Xinqi is a little bit aggressive, therefore, their conversation raised my attention, as I was the duty team leader. Xinqi turned to the others discussing the same thing, and the noise level is high. Andy Ryan asked her to bring the voice down and follow the company’s policy.’ It’s different from what you said. |
| Xinqi: | You mean the attitude? The attitude between Ryan and me? I cannot understand it. |
| Rob: | Is it noisy when you were talking to Yunfei? |
| Xinqi: | I didn’t raise my voice to Ryan. I cannot understand the witness’ words. |
| Rob: | Which one? |
| Xinqi: | When I look through the account in account manager, I didn’t find the escalation notes. I did ask Ryan the date receiving the complaint. |
| Rob: | From this part, you agree with the content. |
| Xinqi: | After I knew the date, I don’t know why I’m a bit aggressive to Ryan. I don’t agree with it. I was watching the screen. |
| Rob: | The comments of high noise level. Do you agree with it? |
| Xinqi: | It’s quite a long time. |
| Rob: | What was your noise level at that time? |
| Xinqi: | To be honest, compare with other’s singing or chatting… |
| Rob: | Not compare with others. What the noise level was: shouting or raise voice? |
| Xinqi: | I was not shouting, not piss off. How could him make so many judgments? |
| Rob: | What judgment? |
| Xinqi: | Xinqi’s piss off. I cannot repeat her original word. What does that mean? |
| Rob: | To me. He remembered the main information. |
| Xinqi: | After Ryan asked me to bring my voice down, I was quite and watching the screen. I was stressful. I discussed it with Yunfei. |
| Rob: | “I cannot repeat her original word, but I remember the main information is ‘You use policy to request me; I would like to see who will die first. No one here is clean; you’d better clean your mess first. I have evidence on my mobile phone.” |
| Xinqi: | I didn’t mention mobile phone. I was talking with Yunfei, it’s not work related. |
| Rob: | Yidan asked regarding the comment ‘I have evidence on my mobile phone’, is it a part of conversation or she mentioned it to someone else later on. Witness said ‘it is part of conversation. On my seat, I can clearly hear it. She said it very clearly. ‘ |
| Xinqi: | I did mentioned about the mobile phone with Yunfei. |
| Rob: | Yidan asked: ‘when she made the above comment, does she more likely speak to herself or she threat Ryan?’. Witness said: ‘in my mind, I just feel she is against Ryan personally.’  If I look at these three statement. Ryan’s, witness’ and yours. They are quite different. Can you explain why they are different? |
| Xinqi: | I didn’t say that. |
| Rob: | The key facts of supervisor’s statement and the TL’s statement are the same. |
| Xinqi: | I didn’t think so. |
| Rob: | Why? |
| Xinqi: | Ryan’s statement is more correct. |
| Rob: | The supervisor’s statement and the TL’s statement are consistency. Why are yours different? |
| Xinqi: | I was sitting at the corner. Yunfei and Alin were sitting with me. Why did nobody investigate it with them? |
| Rob: | These are the evidence of the investigation. Why? |
| Xinqi: | Because it’s not true. I believe the true version should from someone sitting close to me. The other colleagues’ voice was loud. But Yidan and Ryan didn’t mention it. Why? |
| Rob: | I ask you why your statement is different. |
| Xinqi: | I don’t have the answer. |
| Rob: | To recap. When Ryan asked you to bring down your voice. In response to Ryan, did you mention to complain to other department? |
| Xinqi: | I didn’t say that. |
| Rob: | In Ryan’s statement, ‘yes, that is why I decided to go to her ask her ‘Could you bring down your voice as we have noisy policy. Please calm down. If you want to make a complaint, you can do it by following the complain procedure. And Xinqi replied me ‘do not use the policy to request me. If you want to discuss the policy, everyone got their own problem, let us see who will end up in the worst consequences.’ |
| Xinqi: | No. But the noise policy seems only used to against me. It’s not in the statement. |
| Rob: | Did you speak it to Yidan? |
| Xinqi: | Yes. |
| Rob: | When Ryan said to you to bring down your voice. Do you think it’s a reasonable request? Do you think your voice was loud? |
| Xinqi: | I think so. The voice is loud than now. |
| Rob: | Do you have other questions? |
| Xinqi: | I still didn’t understand Yidan’s original questions. They are not the same order. |
| Rob: | I didn’t follow you. Why? |
| Xinqi: | I didn’t mention the mobile phone stored the work related information. |
| Rob: | But you did mention the mobile, right? |
| Xinqi: | Yes, that’s one hour after. |
| Rob: | Now is 10:47. I would review the meeting and give you the decision. |
| Yunfei: | May I say something? |
| Rob: | Is it related to this meeting? |
| Yunfei: | Xinqi mentioned she didn’t ask the customer to send email when the customer wanted to make a complaint. We try to avoid the complain, that’s why we refer the issue to TL or Sup first, instead of giving the customer’s email. |
|  | Meeting paused at 10:49 |
|  | Rejoined at 11:01. |
| Rob: | Regards the customer’s complaint, the issue is you failed to follow the customer service ethos. You explained to me you tried to explain the issue to the customer. You also explained the customer was quite annoying you. I also understand you referred it to TL to avoid complaint, after customer wanted to complain you. Regards the conduct issue, you refused to accept Ryan’s decision, starting to raise your voice. You made the statement that ‘not only customer can make complain, I can also make a complaint as well, I can complain to other department.’ Shortly after that, you raised your voice. When Ryan asked you to bring down your voice, your response is ‘do not use the policy to against me. If you want to discuss the policy, everyone got their own problem.’ Do you want to add something additional? |
| Xinqi: | For Ryan’s statement, did you check it? All the statement from Ryan and Yidan? |
| Rob: | This is the statement from Yidan. This’s from Ryan. |
| Xinqi: | What I questioned is the statement from the duty TL. Do you know who is the duty TL? |
| Rob: | I do. |
| Rob: | Regards to the customer’s complain, in terms of the service level of the call, I don’t think you as a band B advisor provided the service in line with the customer service ethos. Your explanation is the customer’s voice is annoying. I don’t accept it. You raised your voice in the office after Ryan confirmed the date of the complaint. Ryan asked you to lower your voice, and you challenged the noise level. You didn’t point it out why your statement is different from the supervisor and TL’s ones, for example, the mobile phone. Two statements are here, and consider your past records, I would giving you the final warning. The final warning is 12 months, if you have any further misconduct issue within 12 months, you will receive further action, including dismissal. |
| Xinqi: | What is the 12 months? |
| Rob: | If you have any further conduct issue within 12 months, you will receive further action. |
| Xinqi: | Where can I go to appeal? |
| Rob: | The appeal will go to the next level above me. Any question? |
| Xinqi: | No. |
|  | The meeting ended at 11:17. |
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