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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 you 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: |  |
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