



AllivetTM
Trusted Pet Pharmacy Since 1992



QUALITY ASSURANCE

CALL FLOW

INBOUND CUSTOMER SERVICE

SECTION 1: SOFT SKILLS

Soft skills are interpersonal (people) skills:

- Communication
- Self Motivation
- Self Awareness
- Empathy
- Flexibility

SECTION 1: SOFT SKILLS

Section 1: Soft Skills	
Greeting	<p>Uses proper greeting script:</p> <ul style="list-style-type: none"> Uses appropriate greeting "Thank you for calling Allivet, this is [Agent name] speaking. Who do I have the pleasure of speaking with today? Thanks (Caller name) how can I help you?" <p>Asks how they can help the caller</p>
Uses proper tone and manner	<p>Engages the customer with a polite demeanor and avoids sounding indifferent or monotone.</p> <ul style="list-style-type: none"> Uses pleasant, modulated tone Matches pace Displays confidence
Uses proper hold/silence etiquette	<p>Asks the customer by name if they may place them on hold along with the reason for doing so. Upon coming back to the call, they address the customer by name again, make sure they are on the line and thank them for holding. No longer 2 minutes per hold.</p> <p>When not putting customer on hold, but looking into account, etc. Let the customer know what you are doing before going silent</p>
Uses customer's and pet's names appropriately	<p>Uses the customer's name throughout the call and when referring to medication they should use the pet's name. IE: "Thank you for holding John, we will have Sparky's Bravecto shipped out today."</p> <ul style="list-style-type: none"> Caller's name - 3 times minimum Pet's name - when placing, changing order and when appropriate. ALWAYS IF PET DECEASED

Section 1 Soft Skills	Disposition/ Weighted Scores	Comments
Greeting	Pass	
Uses Proper greeting script	Pass	
Asks how they can help the caller		
Uses I can help you statement		
Uses proper tone and manner:	Pass	
Uses pleasant, modulated tone		
Matches pace		
Displays confidence		
Uses proper hold/silence etiquette		
Uses customer's and pet's names appropriately	Pass	
Customer		
Pet		
Section Score	20%	

SECTION 2: LISTEN & RESOLVE

Ability to put things into perspective, weigh the options.

- Responsibility
- Problem solving
- Decisiveness

SECTION 2: LISTEN & RESOLVE

Section 2: Listen and Resolve	
Uses active listening techniques	<ul style="list-style-type: none"> Allows customer to fully explain issue Correctly identifies issue Responds back with brief synopsis
Displays empathy and responds appropriately	<ul style="list-style-type: none"> Responds to the customer's situation appropriately Responds with the appropriate level of empathy Displays a sense of urgency Apologizes as needed Uses appropriate apology statement(s): Apologizes to a customer using the appropriate language to convey the severity of the issue that occurred. IE: a customer receiving medication an hour after the expected delivery time is an inconvenience. A customer's order being wrong and their pet missing a dosage of a necessary medication is more serious. Thanks customer when they provide information
Takes ownership of the customer's issue	The representative should let the customer know they will be the person to fix the issue and demonstrate the ability to do so on the call. If they cannot handle it directly, they need to let the customer know how it will be handled and they need to follow up to ensure it is resolved.
De-escalates customer appropriately	If a customer is initially agitated on the call, the representative is able to calm the customer down and address their concern. The representative should avoid doing things to intentionally agitate a customer while on the call.
Provides proper resolution	The representative should do everything within reason to make the situation right and ensure the customer is satisfied.
Communicates next steps	If a situation cannot be resolved immediately, the representative should clearly lay out next steps to the customer. This should include when the customer can expect a follow up.
Follows up when required	<ul style="list-style-type: none"> Follows up with customer if promised Reviews account to make sure issue(s) resolved
Makes attempt to retain customer	If a customer wishes to cancel an order and does not state that the pet is deceased, we should uncover the reason for the cancellation and attempt to save the order.
Makes it effortless for the customer	Avoids unnecessary steps for the customer and does not place unnecessary barriers in front of them to make a resolution more difficult. IE: Making a customer take pictures of an item before we will offer a refund.

Section 2 Listen and Resolve	Disposition	Comments
Uses active listening techniques	Pass	
Allows customer to fully explain issue		
Correctly identifies issue		
Responds back with brief synopsis		
Displays empathy and responds appropriately	Pass	
Responds to the customer's situation appropriately		
Responds with the appropriate level of empathy		
Displays a sense of urgency		
Apologizes as needed		
Uses appropriate apology statement(s)		
Thanks customer when they provide information		
Takes ownership of the customer's issue		
De-escalates customer appropriately		
Provides the proper resolution		
Communicates next steps		
Follows up when required		
Makes attempt to retain customer		
Makes it effortless for the customer		
Section Score	0%	40 pts

SECTION 3: SYSTEMS & PROCEDURES

Thorough knowledge of systems and procedures ensures a consistently high level of quality and service.

- Accuracy
- Thoroughness
- Compliance

SECTION 3: SYSTEMS & PROCEDURES

Section 3 Systems & Procedures	
Locates customer efficiently	Representative locates the customer's account quickly without making them repeat information unnecessarily.
Verifies the account	Agent verifies the phone number or e-mail.
Verbally verifies billing and shipping addresses when a customer places a new order.	Agent should confirm the customers full billing address and ask them if they will be shipping to a different address, if <u>so</u> they need to verify it as well.
Updates account and order appropriately	All information should be input accurately and in the proper location.
Provides accurate information to the customer	All information provided should be accurate to the best ability of the agent.
Places appropriate notes	<ul style="list-style-type: none"> Name of person spoken to Narrative of situation Narrative of resolution
Dispositions call	Agent should disposition each call
Escalates order appropriately	Follows proper guidance on when to refer orders to the escalations and pharmacy teams.
Offers to obtain verbal when appropriate	If the customer is waiting for an approval, the agent offers to have us contact the vet for the approval.
Offers appropriate discount or shipping waiver	Offers the proper discount or to waive/expedite shipping to satisfy the customer.
Masks credit card information	Masks when customer provides credit card information
Escalates call when customer requests manager	When a customer requests a manager, we follow the proper guidelines: <ul style="list-style-type: none"> If at the very beginning of the call, we should make a sincere offer to help and offer to provide a manager at the end of the call if necessary. If they still would like a manager, we follow the proper escalation guidelines Once a call has commenced and a customer would like a <u>manager</u> we should get one for them in accordance with guidelines.

Section 3 Systems & Procedures	Disposition	Comments
Locates customer efficiently		
Verifies the account		
Verbally verifies billing and shipping addresses when rep places a new order.		
Updates account or order appropriately		
Provides accurate information to the customer		
Places appropriate notes:	Pass	
Name of person spoken to		
Narrative of situation		
Narrative of resolution		
Dispositions Call:		
Escalates issue appropriately		
Offers to obtain verbal when appropriate		
Offers appropriate discount, refund or shipping waiver.		
Masks credit card info		
Escalates call when customer requests manager		
Section Score	0%	30 pts

SECTION 4: CLOSING

Close out call with a strong recap of what actions were taken on behalf of the customer, what are the next steps and properly close. Doing this ensures:

- Accuracy
- Correct expectations set
- Customer satisfaction

SECTION 4: CLOSING

Section 4 Closing	
Call recap	The representative should provide a quick recap of what was done for the client on the call: <ul style="list-style-type: none">• Recaps order placed by agent• Recaps pricing, discounts, refunds• Recaps brief summary of next steps required• Recaps other actions take on behalf of customer
Offers to assist with additional issues before the call closes	Representative should ask if the client needs anything else before the close of the call.
Uses appropriate call close	A proper call close thanks the caller for their business, brands the call and wishes them well. IE: "Thank you for business with Allivet [customer name], have a great day."

Section 4 Closing	Disposition	Comments
Call recap:	Pass	
Recaps order placed by agent		
Recaps pricing, discounts, refunds		
Recaps brief summary of next steps in required		
Recaps other actions taken on behalf of client		
Offers to assist with additional issues before the call closes		
Uses appropriate call close		
Section Score	0%	10 pts

SECTION 5: AUTO FAIL

Behaviors that do not meet the high standards of Allivet!

SECTION 5: AUTO FAIL

Section 5 Auto Fail	
Was rude or condescending to the customer	Representative is rude, combative, sarcastic or talks down to the customer. Rude behavior can range from blatant indifference to the use of foul or inappropriate language.
Jeopardized the health of a pet	The representative failed to act on the urgent need of a pet when expressed by the client. IE: Reshipped a lost package ground and refused no cost overnight shipping when the client said they only had two doses left.
Refused to escalate a call	The representative blatantly refused a manager to the customer.
Failed to mask credit card	The representative fails to mask credit card information
Failed to follow through after call	Advised the client they would take an action and failed to do so.
Provided medical advice to a customer.	Recommended a product to the customer, told them they could substitute one product for another or made a claim as to the efficacy of the medication.

Section 5 Auto Fail	Disposition	Comments
Was rude or condescending to the customer	NA	
Jeopardized the health of a pet	NA	
Refused to escalate a call	NA	
Failed to mask credit card	NA	
Failed to follow through after call	NA	
Provided medical advice to a customer	NA	
Total	0	

CALL FLOW

VET RX APPROVALS/DENIALS

SECTION 1: SOFT SKILLS

Soft skills are interpersonal (people) skills:

- Communication
- Self-Motivation
- Self-Awareness
- Empathy
- Flexibility

SECTION 1: SOFT SKILLS

Section 1: Soft Skills	
Uses proper tone and manner	Engages the customer with a polite demeanor and avoids sounding indifferent or monotone. <ul style="list-style-type: none">• Uses pleasant, modulated tone• Matches pace• Displays confidence
Uses appropriate call close	A proper call close thanks the call recipient for their assistance, brands the call and wishes them well. IE: "Thank you for your assistance [name], have a great day."

Section 1 Soft Skills	Disposition	Comments
Uses pleasant, modulated tone		
Matches pace		
Displays confidence		
Uses appropriate call close		
Section Score	0	50 pts

SECTION 2: SYSTEMS & PROCEDURES

Thorough knowledge of systems and procedures ensures a consistently high level of quality and service.

SECTION 2: SYSTEMS & PROCEDURES

Section 1: Soft Skills	
Uses proper tone and manner	Engages the customer with a polite demeanor and avoids sounding indifferent or monotone. <ul style="list-style-type: none">• Uses pleasant, modulated tone• Matches pace• Displays confidence
Uses appropriate call close	A proper call close thanks the call recipient for their assistance, brands the call and wishes them well. IE: "Thank you for your assistance [name], have a great day."

Section 2 Systems & Procedures - Authorization/Decline	Disposition	Comments
Note authorization attached Rx Card		
Customer Notes		
Rx notes proper format		
Advise of declined Rx via email		
Advise of potential mismatch via email		
Section Score	0	50 pts

SECTION 4: AUTO FAIL

Behaviors that do not meet the high standards of Allivet and/or
failure to capture all necessary information on recording

SECTION 3: AUTO FAIL

Section 3 Auto Fail

RECORDING: Rx Approval

All items listed below must be stated and recorded on the call. While not mandatory, asking them in this order is preferred:

- Name of agent/position
- Calling from
- Recorded call script
- Client name
- Pet name(s)
- Item name
- Item strength
- Quantity
- Refills
- Directions
- Authorizing vet:
 - First and last name
 - Spelling if a difficult name
- Name of person spoken to
- Weight verification
- Office number

I.e.: This is [Rep's full name] a customer service representative I would like to inform you this call will be recorded for the pharmacist to review. This approval is for our client [Client name], For their [pet species, name]. I have [pet name] weighing at 46 pounds. Is this information correct? [always verify weight] The owner is requesting [Medication, dosage, quantity] [always confirm DRUG & QTY]. Will there be any refills? [if they say Yes for refills, verify how many]. Are there any directions? Who is the authorizing veterinarian? And to verify the office phone number, I have XXX-XXX-XXXX. May I have your name?

Section 3 Auto Fail	Disposition	Comments
RECORDING: Rx Approved:	Pass	
Name of agent/position		
Calling From Allivet		
Recording Script		
Client Name		
Pet name(s)		
Item name		
Item strength		
Quantity		
Refills		
Directions		
Authorizing vet		
Name of person spoken to		
Weight verification		
Office number		

SECTION 3: AUTO FAIL

RECORDING: Declined	<p>number, I have XXX-XXX-XXXX. Today I have your name:</p> <p>All items listed below must be stated and recorded on the call. While not mandatory, asking them in this order is preferred:</p> <ul style="list-style-type: none"> • Name of agent/position • Calling from • Recording script • Customer name • Pet name(s) • Reason <p>I.e.: This is [Jane Doe] a customer service representative I would like to inform you this call will be recorded for the pharmacist to review. This is a declined prescription for [John Smith], For their pet [Daisy]. Any specific reason? Is there anything else I can help you with?</p>
Was rude or condescending to the customer	Representative is rude, combative, sarcastic or talks down to the customer. Rude behavior can range from blatant indifference to the use of foul or inappropriate language.
Attempted to decipher verbal Rx	<p>The representative questions the Rx:</p> <ul style="list-style-type: none"> • Dosage • Weight • Etc.
Represented self as other than CSR	Representative allows customer to believe they are able to question or make suggestions, decisions, etc.
Failed to attach recording	All steps performed, but recording not attached
Incomplete/call not recorded	Conversation partially recorded or not recorded at all

RECORDING: Rx Declined:	Pass	
Name of agent/position		
Calling From Allivet		
Recording Script		
Customer name		
Pet name(s)		
Reason		
Rude or condescending		
Attempt to decipher verbal Rx		
Represents self as other than CSR		
Fails to attach recording		
Incomplete/no recording		