

## Allivet Inbound Call Quality Assurance Guide Ver. 3

<b>Section 1: Soft Skills</b>	
Greeting	<p>Uses proper greeting script:</p> <ul style="list-style-type: none"> <li>• 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?"</li> </ul> <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"> <li>• Uses pleasant, modulated tone</li> <li>• Matches pace</li> <li>• Displays confidence</li> </ul>
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"> <li>• Caller's name - 3 times minimum</li> <li>• Pet's name - when placing, changing order and when appropriate. ALWAYS IF PET DECEASED</li> </ul>

<b>Section 2: Listen &amp; Resolve</b>	
Uses active listening techniques	<ul style="list-style-type: none"> <li>• Allows customer to fully explain issue</li> <li>• Correctly identifies issue</li> <li>• Uses appropriate open/close probing questions</li> <li>• Responds back with brief synopsis</li> </ul>
Displays empathy and responds appropriately	<ul style="list-style-type: none"> <li>• Responds to the customer's situation appropriately</li> <li>• Responds with the appropriate level of empathy</li> <li>• Displays a sense of urgency</li> <li>• Apologizes as needed</li> <li>• 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</li> </ul>

	<p>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.</p> <ul style="list-style-type: none"> <li>• Uses positive rather than negative statement(s)</li> <li>• Thanks customer when they provide information</li> </ul>
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 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"> <li>• Follows up with customer if promised</li> <li>• Reviews account to make sure issue(s) resolved</li> </ul>
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.

<b>Section 3 Systems &amp; Procedures</b>	
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 so, 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"> <li>• Name of person spoken to</li> <li>• Narrative of situation</li> <li>• Narrative of resolution</li> </ul>

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	<p>When a customer requests a manager, we follow the proper guidelines:</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• Once a call has commenced and a customer would like a manager, we should get one for them in accordance with guidelines.</li> </ul>

<b>Section 4 Closing</b>	
Call recap	<p>The representative should provide a quick recap of what was done for the client on the call:</p> <ul style="list-style-type: none"> <li>• Recaps order placed by agent</li> <li>• Recaps pricing, discounts, refunds</li> <li>• Recaps brief summary of next steps required</li> <li>• Recaps other actions take on behalf of customer</li> </ul>
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."

<b>Section 5 Auto Fail</b>	
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.