

## **YOUCAN Program Various Employee Group Guidelines**

[\*\*Credit Management Center \(CMC\) Employees\*\*](#)

[\*\*DSL Employees\*\*](#)

[\*\*DSL/C Employees\*\*](#)

[\*\*Local Markets Sales Employees\*\*](#)

[\*\*Repair/Screening Employees\*\*](#)

[\*\*SDC Employees\*\*](#)

### **Credit Management Center (CMC) Customer Financial Services (CFS) Employees' Guidelines for Making YOUCAN Referrals**

The YOUCAN Referral Program recognizes and rewards employees for their commitment to driving Qwest revenue and providing the Spirit of Service™ to customers. As a credit consultant in the credit management center, you have the opportunity to submit YOUCAN referrals as a result of your interactions with customers. Here are the guidelines for submitting YOUCAN referrals. Please contact your coach, team leader or YOUCAN program headquarters with questions.

1. Submit YOUCAN referrals **ONLY** when:

You have listened closely to customers during regular interactions, have taken care of their initial need and identified an opportunity for that customer to purchase additional Qwest services

- For example, if a customer complains that he or she didn't receive an important call because his/her teenager was on the phone all afternoon, take the initiative to recommend call waiting as a solution to the problem at hand. If the customer is interested, it is a great opportunity to transfer the customer to the YOUCAN Provisioning Center and receive credit for the referral.

Call 1 866-8YOUCAN (1 **866-896-8226**), for "warm transfers" (option 2 for residential customers, option 3 for business customers.) When transferring the customer to the YOUCAN Provisioning Center, announce the call, provide your CUID and complete the transfer. Your CUID will be used to award referral credit for valid completed sales.

2. CMC/CFS employees are eligible to submit referrals for customers interested in connecting new services with Qwest. Referral awards are based on the products and services the customer orders as a result of your upsell referral.

- The customer must not have a final bill owed currently or paid within the past 90 days (3 months).
  - For example, the customers account must have been paid in full 90+ days ago.
- Referral credit is not available for services that were removed in the last 90 days

3. Transfer a customer to the appropriate sales or customer care center (rather than YOU CAN) when:

- The customer is inquiring about products or services that they already have.
- If the customer has been Disconnected in the past 90 days.
- If the customer has been restored from a SNP status in the past 90 days, AND is requesting information on a product that they currently have or have had in the past 90 days.
- CUSTOMERS CAN NOT BE REFERRED FOR PRODUCTS THAT THEY CURRENTLY HAVE OR PRODUCTS THAT HAVE BEEN ON THEIR CSR IN THE PAST 90 DAYS AND/OR HAVE BEEN REMOVED FOR NON PAYMENT.
- IF YOU DISCOVER THE NEED FOR A PRODUCT THAT HAS NOT BEEN REMOVED FOR NON PAYMENT (SNP OR DISC) IN THE PAST 90 DAYS, NOR HAS BEEN ON THE CUSTOMERS ACCOUNT IN THE PAST 90 DAYS , IT IS REFERRABLE

**Note:** It is extremely important that these calls be routed to the regular channel for appropriate processing.

Please call YOU CAN Program Headquarters with questions (1 866-896-8226, option 1)

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## YOU CAN Referral Program DOs and DON'Ts For CMC/CFS Employees

### Do

- Interview the customer and assess their needs based on what he/she tells you.
- Ask fact finding questions – let the customer tell the story!
- Listen for clues that help you assess customer needs
- Suggest new/upsell products and services that will meet their needs.
- If the customer expresses interest, verify they do not already have the product you are referring.
- Send referrals for the addition of new/upsell Qwest service – such as long distance, high speed Internet, wireless, etc.
- Verify that the customer account is current and does not or has not had a final bill owing in the last 3 months, before making a referral.
- Transfer calls to remove services from a customer account to the business office at 1 800-244-1111.
- Referral awards are based on the new/upsold products and services the customer orders as result of your referral.

### Don't

- Do not use CPNI information to determine referral opportunities.
- Don't refer customers who want to reconnect services that were removed for non-payment (whether the service has been temporarily or completely disconnected) and just paid their final bill within the last 90 days.
- Don't transfer customers to add long distance service back on due to the removal of a toll-block (e.g. NPAPL, SCGXX).
- Don't refer any accounts with company initiated toll blocks (such as rbe1x, scgxx, npapl).
  - Customers who are credit class D may still require a LD deposit.
  - If you have questions on credit class restrictions, refer to [http://rock.uswc.uswest.com/CE\\_Rep/32/0-22162632/CE\\_0-22162632/](http://rock.uswc.uswest.com/CE_Rep/32/0-22162632/CE_0-22162632/).

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## **IMPORTANT REMINDERS**

- Employees may only use information that is publicly available to initiate referrals and contacts and identify possible services and products; never use Customer Proprietary Network Information (CPNI). You may not use the CSR to identify possible sales opportunities.
- Employees providing service or assistance to the customer of another local carrier or provider, on behalf of that other carrier or provider may not refer any Qwest service or product to that customer.
- Employees may never promise or claim service or product performance, standards, or features, and they must always let the Qwest YOU CAN Center fully describe the service/product and close the sale.
- If the customer is not able or willing to wait for a Sales Consultant, please place the referral on line at <http://www.qwestyoucan.com/>.
- Accounts with company-initiated toll blocks, such as rbe1x, scgxx, npapl, should not be warm transferred through YOU CAN. Referrals in this case can be placed on line once the toll block has been removed completely. Advise the customer they will be contacted within 3 business days.
- Customers who are credit class D may still require a LD deposit.
- Please do not quote rates to the customer. The sales consultant has the most up-to-date information on current promotional offers and is best-equipped to provide accurate pricing information.
- Warm transfers can be made Monday through Friday, between 8 a.m. and 6:30 p.m. Central Time (excluding holidays) and on Saturdays for Residential customers only between 8 a.m. to 4:30 p.m. Central Time. If you want to make a referral out of those times or for a business customer on the weekend, please place the referral on line at <http://www.qwestyoucan.com/>.
- Unless the customer has specifically requested that you stay on the line with them, or you have phone limitations which prevent you to disconnect from the warm transfer, please drop off the line once the sales consultant has given you a referral number.

## Digital Subscriber Line (DSL) Center Employees' Guidelines for Making YOUCAN Referrals

The YOUCAN Referral Program recognizes and rewards employees for their commitment to driving Qwest revenue and providing the Spirit of Service™ to customers. As a screening consultant in the DSL center, you have the opportunity to submit YOUCAN referrals as a result of your interactions with customers. Here are the guidelines for submitting YOUCAN referrals. Please contact your coach or team leader with questions.

1. All repair issues must be addressed prior to transferring the customer.
  2. Submit YOUCAN referrals ONLY when:  
You have listened closely to customers during regular interactions, assisted them in identifying products and services that will meet their needs and identified an opportunity for that customer to purchase additional Qwest services
    - For example, if a customer complains that he or she didn't receive an important call because his/her teenager was on the phone all afternoon, take the initiative to recommend call waiting as a solution to the problem at hand. If the customer is interested, it is a great opportunity to transfer the customer the YOUCAN Provisioning Center and receive credit for the referral.
- Call 1 866-8YOUCAN (1 866-896-8226), for "warm transfers." When transferring the customer to the YOUCAN Provisioning Center, announce the call, provide your CUID and complete the transfer. Your CUID will be used to award referral credit for completed sales.
3. Transfer a customer to the appropriate sales or customer care center when:
    - The customer is inquiring about products or services that they already have
    - The customer requests a new connect but is in a non-payment denial status (SNP'd).
    - The customer wants to reconnect services that have been removed for non-payment.

**Note:** It is extremely important that these calls be routed to the regular channel for appropriate processing.

## YOUCAN Referral Program DOs and DON'Ts For DSL Center Employees

Do	Don't
<ul style="list-style-type: none"> <li>• Interview the customer and assess their needs based on what he/she tells you.</li> <li>• Ask fact finding questions – let the customer tell the story! Listen for clues that help you assess customer needs</li> <li>• Suggest products and services that will meet their needs.</li> <li>• If the customer expresses interest, verify they do not already have the product you are referring.</li> <li>• Send referrals for the addition of Qwest products and services – such as long distance, DSL, wireless etc.</li> <li>• Transfer calls to the business office (1 800-244-1111) for: <ul style="list-style-type: none"> <li>– Modems (after issuing RMA)</li> <li>– Repair or business issues</li> <li>– Change in speed (640 to 1.5)</li> <li>– Change cap to DMT requests</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Do not refer customers: <ul style="list-style-type: none"> <li>– Requesting a modem</li> <li>– Stating that they have not received their DSL modem or the modem is not working properly</li> <li>– currently in a non-payment denial status</li> <li>– Requesting a change in speed (640 to 1.5)</li> <li>– Requesting a change cap to DMT</li> <li>– For line conditioning if the wire center has not been disclosed</li> </ul> </li> <li>• Do not refer products that are repair or business office issues. For example: <ul style="list-style-type: none"> <li>– call waiting isn't working</li> <li>– customer called to disconnect services or remove features</li> </ul> </li> <li>• Do not use CPNI information to determine referral opportunities.</li> </ul>

### IMPORTANT REMINDERS

- Employees may only use information that is publicly available to initiate referrals and contacts and identify possible products and services. Never use Customer Proprietary Network Information (CPNI).
- Employees providing service or assistance to the customer of another local carrier or provider, on behalf of that other carrier or provider may not refer any Qwest service or product to that customer.
- Employees may never promise or claim service or product performance, standards, or features, and they must always let the Qwest YOUCAN Center fully describe the service or product and close the sale.
- Referring DSL or wireless upgrades (even if there's positive revenue) will not result in referral credit.

- If the customer is not able or willing to wait for a sales consultant, please place the referral on line at <http://www.qwestyoucan.com/>.
- Accounts with company-initiated toll blocks, such as RBE1X, SCGXX, NPAPL, should not be warm transferred through YUCAN. Referrals in this case can be placed online once the toll block has been removed completely. Advise the customer they will be contacted within 3 business days.
- Customers who are credit class “D” may still require a long-distance deposit. Do not quote rates to the customer. The sales consultant has the most up-to-date information on current promotional offers and is best-equipped to provide accurate pricing information.  
Warm transfers can be made Monday through Friday, between 8 a.m. and 6:30 p.m. Central Time (excluding holidays) and on Saturdays for Residential customers only between 8 a.m. to 4:30 p.m. Central Time. If you want to make a referral out of those times or for a business customer on the weekend, please place the referral on line at <http://www.qwestyoucan.com/>.
- Unless the customer has specifically requested that you stay on the line with them, or you have phone limitations which prevent you to disconnect from the warm transfer, please drop off the line once the sales consultant has given you a referral number.



## Digital Subscriber Line Care (DSL/C) Center Employees' Guidelines for Making YOU/CAN Referrals

The YOU/CAN Referral Program recognizes and rewards employees for their commitment to driving Qwest revenue and providing the Spirit of Service™ to customers. As a sales and service consultant in the DSL/C center, you have the opportunity to submit YOU/CAN referrals as a result of your interactions with customers. Here are the guidelines for submitting YOU/CAN referrals. Please contact your coach or team leader with questions.

1. All repair issues must be addressed prior to transferring the customer.
2. Submit YOU/CAN referrals ONLY when:  
You have listened closely to customers during regular interactions, assisted them in identifying products and services that will meet their needs and identified an opportunity for that customer to purchase additional Qwest services
  - For example, if a customer complains that he or she didn't receive an important call because his/her teenager was on the phone all afternoon, take the initiative to recommend call waiting as a solution to the problem at hand. If the customer is interested, it is a great opportunity to transfer the customer the YOU/CAN Provisioning Center and receive credit for the referral.

Call 1 866-8YOU/CAN (1 866-896-8226), for "warm transfers." When transferring the customer to the YOU/CAN Provisioning Center, announce the call, provide your CUID and complete the transfer. Your CUID will be used to award referral credit for completed sales.

3. Transfer a customer to the appropriate sales or customer care center when:
  - The customer is inquiring about products or services that they already have
  - The customer requests a new connect but is in a non-payment denial status (SNP'd).
  - The customer wants to reconnect services that have been removed for non-payment.

**Note:** It is extremely important that these calls be routed to the regular channel for appropriate processing.



## YOUCAN Referral Program DOs and DON'Ts For DSL Care Center Employees

Do	Don't
<ul style="list-style-type: none"> <li>• Interview the customer and assess their needs based on what he/she tells you.</li> <li>• Ask fact finding questions – let the customer tell the story! Listen for clues that help you assess customer needs</li> <li>• Suggest products and services that will meet their needs.</li> <li>• If the customer expresses interest, verify they do not already have the product you are referring.</li> <li>• Send referrals for the addition of Qwest products and services – such as long distance, DSL, wireless, etc.</li> <li>• Transfer calls to the business office (1 800-244-1111) for:               <ul style="list-style-type: none"> <li>– Modems (after issuing RMA)</li> <li>– Repair or business issues</li> <li>– Change in speed (640 to 1.5)</li> <li>– Change cap to DMT requests</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Do not refer customers:               <ul style="list-style-type: none"> <li>– Requesting a modem</li> <li>– Stating that they have not received their DSL modem or the modem is not working properly</li> <li>– Currently in a non-payment denial status</li> <li>– Requesting a change in speed (640 to 1.5)</li> <li>– Requesting a change cap to DMT</li> <li>– For line conditioning if the wire center has not been disclosed</li> </ul> </li> <li>• Do not refer products that are repair or business office issues. For example:               <ul style="list-style-type: none"> <li>– call waiting isn't working</li> <li>– customer called to disconnect services or remove features</li> </ul> </li> <li>• Do not use CPNI information to determine referral opportunities.</li> </ul>

### IMPORTANT REMINDERS

- Employees may only use information that is publicly available to initiate referrals and contacts and identify possible products and services. Never use Customer Proprietary Network Information (CPNI).
- Employees providing service or assistance to the customer of another local carrier or provider, on behalf of that other carrier or provider may not refer any Qwest service or product to that customer.
- Employees may never promise or claim service or product performance, standards, or features, and they must always let the Qwest YOUCAN Center fully describe the service or product and close the sale.
- Referring DSL or wireless upgrades (even if there's positive revenue) will not result in referral credit.
- Unless the customer has specifically requested that you stay on the line with them, or you have phone limitations which prevent you to disconnect from the warm transfer, please drop off the line once the sales consultant has given you a referral number.

- If the customer is not able or willing to wait for a sales consultant, please place the referral on line at <http://www.qwestyoucan.com/>.
- Accounts with company-initiated toll blocks, such as RBE1X, SCGXX, NPAPL, should not be warm transferred through YUCAN. Referrals in this case can be placed online once the toll block has been removed completely. Advise the customer they will be contacted within 3 business days.
- Customers who are credit class "D" may still require a long-distance deposit.
- Do not quote rates to the customer. The sales consultant has the most up-to-date information on current promotional offers and is best-equipped to provide accurate pricing information.
- Warm transfers can be made Monday through Friday, between 8 a.m. and 6:30 p.m. Central Time (excluding holidays) and on Saturdays for Residential customers only between 8 a.m. to 4:30 p.m. Central Time. If you want to make a referral out of those times or for a business customer on the weekend, please place the referral on line at <http://www.qwestyoucan.com/>.

## Local Markets Sales Employees' Guidelines for YOUCAN Referrals

The YOUCAN Referral Program recognizes and rewards employees for their commitment to driving Qwest revenue and providing the Spirit of Service™ to customers. As members of the Local Markets Sales (LMS) team, you will have the opportunity to receive business YOUCAN referrals generated from any eligible Qwest employee. Following are some guidelines for working and provisioning these referrals. Please contact your manager with additional questions not covered in this document.

Qwest representatives who are authorized to accept these employee referrals are LMS Senior Account Executives (SAE), Account Executives (AE) or Customer Account Mgrs (CAM).

Once an eligible Qwest employee has identified an opportunity for a business referral, he/she will call into the YOUCAN Program HQ at 1 866-8YOUCAN (1 866-896-8226), option 5 to place the business referral.

**This is the only way a referral can be generated.** If an eligible Qwest employee was to give a LMS representative a referral in person or over the phone, the LMS representative should direct the technician to YOUCAN Program HQ 1 866-8YOUCAN, option 5. Giving a lead directly to an LMS representative is a violation of the rules.

Once the referral has been placed in the CCI lead tracking tool and a referral number is generated, Program Headquarters will determine where the lead is sent (to an existing Account Executive, or the YOUCAN Business Sales Center). If it is determined that a lead should go to an assigned LMS representative, then the LMS representative, as well as his/her direct supervisor, will be notified via e-mail of the lead. Only after a referral number is generated may a LMS representative then proceed to work the lead. The LMS representative will contact the customer directly within eight (8) business hours and provide business solutions to meet the customer's needs.

The LMS representative will utilize the "A Team" to provision orders, verify pending orders and disposition the referral to grant credit (or not) to the eligible employee. It is critical that referrals are closed out in a timely manner (no more than 48 business hours) providing either status or final disposition of the lead. Contact to the "A Team" should be made via e-mail at [youcan@qwest.com](mailto:youcan@qwest.com) or 1 866-966-4700 or through the e-form located on the LMS Q-Share site along with all other electronic order forms.

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After a sale concludes, the following information must be provided to the “A Team” for proper disposition of the referral:

- Referral Number (should be in the subject line of the e-mail)
- LMS representative’s name
- LMS representative’s CBR
- LMS representative’s CUID
- The product(s) that were ordered (no usoc codes)
- Order Number
- Due Date

All YOUCAN eligible business products may be provisioned and granted referral credit on these leads. For a complete list of YOUCAN eligible business products, please visit <http://www.qwestyoucan.com/> and click on Award Values.

With regard to the LMS YOUCAN Employee Program, eligible LMS representative personnel **may do** the following:

**Employee Referral Program** Confidential/Proprietary Information Disclose  
Only to Qwest Employees with a Need to Know (2)

- Receive **business** YOUCAN referrals ONLY. These leads will be generated by any eligible Qwest employee. The LMS representative will then be notified of the lead via e-mail from the [youcan@qwest.com](mailto:youcan@qwest.com) address ONLY
- Utilize the pre-established ordering process to submit customer orders on all products related to the referral and to verify all sales/dispositions
- Utilize the “A Team” to provision orders, status and close referrals. The e-form is located on the LMS Q-Share site along with all other electronic order forms. Note: If the Sales Rep was notified of the lead through an e-mail via the lead tracker tool, the Sales Rep can reply to the e-mail with the status or close the lead as well
- Build future relationships with eligible Qwest employees and encourage business referrals be worked by the LMS representative
- Transfer a customer to the appropriate sales or customer care center when one of the following occurs:
  - The customer is inquiring about products or services they already have
  - The customer requests a new connect but is in a non-payment denial status (SNP’d)
  - The customer wants to reconnect services that have been removed for non-payment

With regard to the LMS YOUCAN employee Program, eligible LMS participants may **never** do the following:

- Work a business lead given directly from any eligible Qwest employee
- Work a consumer lead generated through the YOUCAN referral program

- Utilize proprietary information to determine sales opportunities without the customer's permission
- Pass customer information to any other employee under any circumstances
- Assign, create, or designate referrals to a referring employee who is not directly connected with the actual referral situation. All referrals must be legitimate YOUCAN referrals and must be worked within the Spirit of Service™
- Place or work a self-referral for a YOUCAN participant
- Make agreements between other Qwest employees to share any compensation or rewards resulting from the sale of YOUCAN referrals
- Create outbound telemarketing, door-to-door sales or promotional advertising or use of any material not expressly permitted by the Terms and Conditions of the program. Should any materials be created or used, they must be approved in advance and in writing through the LMS Merchandising Manager and the YOUCAN Referral program management team
- Enter into any other agreement – verbal or written – outside of the Terms and Conditions of the Program that incent preference in the referral of sales opportunities
- Use inaccurate data or information in a referral. Product type, quantity and the CUID of the LMS Representative must all be accurately provided and populated

The "A Team" will verify all referrals and disposition appropriately. YOUCAN program headquarters will resolve all escalations, investigations or disputes. Contact the YOUCAN program HQ team at [youcan@qwest.com](mailto:youcan@qwest.com) or 1 866-8YOUCAN.

**Please note:** LMS personnel may NEVER share rewards or proprietary customer information with customers or YOUCAN referral participants. Additionally, all eligible LMS employees who participate in the program are required to read, understand and follow the Qwest Code of Conduct, corporate policies, these guidelines and the Terms and Conditions supporting the program, particularly as they relate to ethical sales practices. Failure to follow the above mentioned Code, policies, and Guidelines may result in discipline, up to and including termination of employment. Qwest reserves the right to revise the program, product eligibility, work group eligibility, awards or cancel the program at any time, without notice, and without any liability or obligation to any employee.

**Employee Referral Program** Confidential/Proprietary Information Disclose Only to Qwest Employees with a Need to Know (3)

**IMPORTANT REMINDERS:**

- YOUCAN referral participants, LMS Representatives, members of the “A Team” and Program HQ personnel may only use information that is publicly available to initiate referrals and contacts and identify possible services and products; never use CPNI. You may not use the CSR to identify possible sales opportunities.
- Network Technicians or Qwest employees providing service or assistance to the customer of another local carrier or provider, on behalf of that other carrier or provider may not refer any Qwest service/product to that customer.
- Referees may never promise or claim service or product performance, standards, or features, and must always let Qwest Authorized Representatives fully describe the service/product and close the sale.
- Accounts with company-initiated toll blocks, such as rbe1x, scgxx, and npapl, should not be warm transferred through the LMS process. Referrals in this case can be placed on line once the toll block has been removed completely. Advise the customer they will be contacted within three business days.
- All Qwest credit policies and guidelines apply for referred customers.
- Direct transfers of customers may not be made through this program. Eligible Qwest employees wanting their business leads worked by an LMS representative must place the referral through the YOUCAN Program HQ at 1 866-8YOUCAN.

**LMS Audit and Quality Control Review Process**

The “A Team” representative will verify the referral was placed accurately and in a timely manner. If the referral closed as something other than originally referred, the “A team” will follow up with Program HQ to ensure compliance with the program Terms and Conditions and the Qwest Code of Conduct

YOUCAN Program HQ and local operations teams will monitor all open referrals on a daily and weekly basis

The CUID of the LMS Rep that sold the products or services is required on all referrals that go into a **purchased** status. The individual that sold the products or services must be identified in the CCI tool as the responsible party for provisioning or selling the order

Reports will be pulled monthly with a six-month rolling timeline to ensure integrity and compliance of program Terms and Conditions and Qwest Code of Conduct are maintained.



**Local Markets Sales  
YOUCAN Program  
Effective May 19, 2006  
Updated February 2007**

This certifies that the undersigned employee has received a copy of and been covered on the LMS YOUCAN program guidelines with its Terms and Conditions. The undersigned employee also acknowledges that any violation of this policy may result in discipline up to and including termination.

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Print Name

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Signature

Date: \_\_\_\_\_ Elect Not to Sign: \_\_\_\_\_

\_\_\_\_\_  
Manager/Supervisor Date: \_\_\_\_\_



## Repair Center Guidelines for Making YOUCAN Referrals

The YOUCAN Referral Program recognizes and rewards employees for their commitment to driving Qwest revenue and providing the Spirit of Service™ to customers. As a screening consultant in the repair center, you have the opportunity to submit YOUCAN referrals as a result of your interactions with customers. Here are the guidelines for submitting YOUCAN referrals. Please contact your coach or team leader with questions.

1. All repair issues must be addressed prior to transferring the customer.
2. Submit YOUCAN referrals ONLY when:  
You have listened closely to customers during regular interactions, assisted them in identifying products and services that will meet their needs and identified an opportunity for that customer to purchase additional Qwest services
  - For example, if a customer complains that he or she didn't receive an important call because his/her teenager was on the phone all afternoon, take the initiative to recommend call waiting as a solution to the problem at hand. If the customer is interested, it is a great opportunity to transfer the customer to the YOUCAN Provisioning Center and receive credit for the referral.

Call 1 866-8YOUCAN (1 866-896-8226), for "warm transfers." When transferring the customer to the YOUCAN Provisioning Center, announce the call, provide your CUID and complete the transfer. Your CUID will be used to award referral credit for completed sales.

3. Transfer a customer to the appropriate sales or customer care center when:
  - The customer is inquiring about products or services that they already have
  - The customer requests a new connect but is in a non-payment denial status (SNP'd).
  - The customer wants to reconnect services that have been removed for non-payment.

**Note:** It is extremely important that these calls be routed to the regular channel for appropriate processing.

## YOU CAN Referral Program DOs and DON'Ts For REPAIR/SCREENING Employees

Do	Don't
<ul style="list-style-type: none"> <li>• Interview the customer and assess their needs based on what he/she tells you.</li> <li>• Ask fact finding questions – let the customer tell the story!</li> <li>• Listen for clues that help you assess customer needs</li> <li>• Suggest products and services that will meet their needs.</li> <li>• If the customer expresses interest, verify they do not already have the product you are referring.</li> <li>• Send referrals for the addition of Qwest products and services – such as long distance, DSL, wireless etc.</li> <li>• Transfer calls to remove services from a customer account to the business office at 1 800-244-1111.</li> <li>• Submit online referrals for customers requesting products or services as the result of a toll-block removal (e.g. NPAPL, SCGXX )</li> <li>• Submit online referrals for new products and services for customers restored from an SNP'd status.</li> <li>• Submit online referrals for a customer call back to add wire maintenance at a later date if the customer has EXISTING trouble (which would not be covered).</li> </ul>	<ul style="list-style-type: none"> <li>• Do not refer customers:               <ul style="list-style-type: none"> <li>– To change ring cycle on voice mail service</li> <li>– Who state that they have not received their DSL modem or the modem is not working properly</li> <li>– Who are currently in a non-payment denial status</li> <li>– Who want to reconnect services that were removed for non-payment (SNP'd).</li> </ul> </li> <li>• Do not refer products that are repair or business office issues. For example:               <ul style="list-style-type: none"> <li>– Call waiting isn't working</li> <li>– Customer called to disconnect services or remove features</li> </ul> </li> <li>• Do not use CPNI information to determine referral opportunities.</li> <li>• Don't warm transfer customers for restored service from an SNP'd status or disconnect due to non-payment, or</li> <li>• Don't warm transfer customers as the result of a removal of a toll-block (e.g. NPAPL, SCGXX).</li> <li>• Don't warm transfer a customers to add wire maintenance for EXISTING trouble, as existing trouble can not be covered by adding wire maintenance.</li> </ul>

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## **IMPORTANT REMINDERS**

- Employees may only use information that is publicly available to initiate referrals and contacts and identify possible services and products; never use Customer Proprietary Network Information (CPNI).
- Employees providing service or assistance to the customer of another local carrier or provider, on behalf of that other carrier or provider may not refer any Qwest service or product to that customer.
- Employees may never promise or claim service or product performance, standards, or features, and they must always let the Qwest YOUCAN Center fully describe the service or product and close the sale. Please do not quote rates to the customer. The sales consultant has the most up-to-date information on current promotional offers and is best-equipped to provide accurate pricing information.
- Unless the customer has specifically requested that you stay on the line with them, or you have phone limitations which prevent you to disconnect from the warm transfer, please drop off the line once you provide your CUID to the sales consultant.
- If the customer is not able or willing to wait for a sales consultant, please call YOUCAN program headquarters at 1 866-896-8226 option 3 to submit a call back referral or place the referral on line at <http://www.qwestyoucan.com/>.
- Accounts with company initiated toll blocks, such as RBE1X, SCGXX, NPAPL, should not be warm transferred through YOUCAN. Referrals in this case can be placed on line once the toll block has been removed completely. Advise the customer they will be contacted within 3 business days.
- Customers who are credit class D may still require a LD deposit.

## **Employee Referral Program Service Delivery Coordinator (SDC) Guidelines for Making YOUCAN Referrals**

The YOUCAN Referral Program recognizes and rewards employees for their commitment to driving Qwest revenue and providing the Spirit of Service™ to customers. As a service delivery coordinator (SDC), you have the opportunity to submit YOUCAN referrals as a result of your interactions with customers. Here are the guidelines for submitting YOUCAN referrals. Please contact your coach or team leader with questions. Please note that this is a voluntary program.

- SDCs may submit referrals for customers, friends and family, as well as self-referrals (for eligible products). These are referred to as “Non-provisioned referrals” and must be submitted through the normal YOUCAN process.
- SDCs may also submit referrals for products and services they up sell to customers. These are referred to as “Completed Order” referrals or “Provisioned” referrals and must follow the specific guidelines outlined below.
- SDCs may submit referrals for service upgrades. These are for products and services that are not normally negotiated, priced or provisioned by the SDC such as DS1 and above, Frame, CPE, Data and all QCC services. Referrals must follow the specific guidelines outlined below and only applies if the customer does not have existing Qwest service or does not have an assigned Sales Representative.

### **Completed Order Guidelines for up sold Products & Services:**

1. Referrals can be made for customer up sells only.
  - 1.1. Example 1: Customer calls in to add one line to their account, you and the customer agree that they actually need two lines, you would refer the one additional line you negotiated and provisioned on behalf of the customer as your YOUCAN up sell.
  - 1.2. Example 2: Customer calls for a new line, you and the customer agree that a package would best suit their needs, you would refer the “package upgrade” you negotiated and provisioned on behalf of the customer as your YOUCAN up sell.
  - 1.3. Example 3: Customer calls in for high-speed Internet. You and the customer agree that a higher speed would best suit their needs, you would refer the “DSL Upgrade” for the higher speed you negotiated and provisioned on behalf of the customer as your YOUCAN up sell.
  - 1.4. Example 4: Customer calls in for wireless service. You and the customer agree that a higher minute plan or an ‘add a line’ would best suit their needs. You would refer a “Wireless Plan Upgrade” or an “Add a Line” for the higher minute plan or add a line that you negotiated and provisioned on behalf of the customer as your YOUCAN up sell.

2. Submit YOUCAN referrals ONLY when the following occurs:
  - 2.1. You have listened closely and taken care of the customer's initial request.
  - 2.2. Assisted them in identifying additional services that will meet their needs.
  - 2.3. Customer has agreed to purchase the additional Qwest services you up sold.
3. SDC must always do the following:
  - 3.1. Enter "notes" in BOSS/CARS.
  - 3.2. Notes must include the following details:
    - 3.2.1. Reason the customer called.
    - 3.2.2. Service the customer ordered.
    - 3.2.3. Type of additional service you up sold.
    - 3.2.4. The order number.
    - 3.2.5. All customer contact information per SOQ guidelines.
  - 3.3. Type the order.

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- 3.4. Submit completed order referrals through the YOUCAN Web site, [www.qwestyoucan.com](http://www.qwestyoucan.com), and select order type: completed work order.
- 3.5. Populate the "comment" section on the referral form.
- 3.6. Comment section must include the following details:
  - 3.6.1. Reason the customer called.
  - 3.6.2. Service the customer ordered.
  - 3.6.3. Type of additional service you up sold.
  - 3.6.4. The order number.
  - 3.6.5. Descriptor "already provisioned".
4. Do not transfer the customer to the YOUCAN toll free number.
5. Migrating from a grandfathered service to a new Qwest service, and contract renewals do not qualify for YOUCAN referral credit, even if the revenue is positive. Please do not submit these changes for referral consideration.
6. SDCs are eligible to submit Winback referrals for customers interested in new services.
  - 6.1. Winback referrals can be submitted if you were responsible for winning the customer back to Qwest.
  - 6.2. Winback needs to be an up sell opportunity to qualify as a valid referral.
  - 6.3. Follow steps 1 through 4 above.
  - 6.4. Comment section must also include how you won the customer back.
7. Do not submit a referral for anything that is part of your job responsibility.
8. Completed order referrals can only be submitted through the YOUCAN Web site, [www.qwestyoucan.com](http://www.qwestyoucan.com).

#### **Service Upgrade Guidelines:**

9. Service upgrades that are identified by the SDC and that are not normally negotiated, priced or provisioned by the SDC can be submitted through the

YOUCAN process. For example: DS1 and above, Frame, CPE, Data and all QCC services.

- 9.1. Check Research Manager to determine if the customer has an assigned Sales Representative.
- 9.2. If the customer has existing Qwest service and an assigned Sales Representative, refer the sale to the Sales Representative according to local practice.
- 9.3. If the customer does not have existing Qwest service or does not have an assigned Sales Representative, proceed with your YOUCAN referral.
- 9.4. Referral process for service upgrades only:
  - 9.4.1. Warm transfer the customer to 866-896-8226
  - 9.4.2. Create the referral via [www.qwestyoucan.com](http://www.qwestyoucan.com)
  - 9.4.3. Call Program HQ at 1 866-896-8226.
  - 9.4.4. Follow steps 2 and 3 above.
- 9.5. Provisioning process:
  - 9.5.1. YOUCAN Provisioning Center submits order request through OMS to appropriate business unit for provisioning.
  - 9.5.2. YOUCAN Provisioning Center identifies customer through Q Central and adds appropriate SLSS ID.
10. Do not submit a referral for anything that is part of your job responsibility.

Please note that these guidelines are used in addition to the terms and conditions (Ts&Cs) of the YOUCAN Referral Program. Please make sure that you review the Ts&Cs on the YOUCAN Web site. All Code of Conduct and Qwest compliance policies are in effect with this program.

This information is located on the YOUCAN Web site @ <http://www.qwestyoucan.com/>.

**YOUCAN program Management will conduct random verifications to ensure adherence to these guidelines.**

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## Service Delivery Coordinator (SDC) DOs and DON'Ts

Do	Don't
<ul style="list-style-type: none"> <li>• Interview the customer and assess their needs based on what they tell you.</li> <li>• Understand and follow CPNI rules, and obtain the customer's consent when appropriate, if you are using customer records to sell Qwest services.</li> <li>• Ask fact-finding questions—let the customer tell the story!</li> <li>• Listen for clues that help you assess customer needs.</li> <li>• Suggest services that will meet their needs.</li> <li>• Verify that the customer does not already have the service you are referring if the customer expresses interest,</li> <li>• Submit referrals for the addition of Qwest services such as long-distance, high-speed Internet, wireless, etc.</li> <li>• Verify that the customer account is current before making a referral.</li> <li>• Incorporate "notes" in Boss/Cars, as well as in the "notes" section on the referral form if the customer agrees to add additional services. Make notes specific to the reason the customer called, the type of service they ordered, and the type of additional service sold.</li> </ul>	<ul style="list-style-type: none"> <li>• Refer customers who are currently in a non-payment denial status.</li> <li>• Submit referrals for contract renewals.</li> <li>• Refer customers who want to reconnect services that were removed for non-payment (SNPd).</li> <li>• Warm transfer customers for restored service from an SNPd status or disconnect due to non-payment.</li> <li>• Warm transfer customers as the result of a removal of a toll-block (e.g. NPAPL, SCGXX).</li> <li>• Refer any accounts with company-initiated toll blocks (such as RBE1X, SCGXX, NPAPL).</li> <li>• Customers who are credit-class D may still require an LD deposit.</li> <li>• If you have questions on credit-class restrictions, refer to <a href="http://rock.uswc.uswest.com/CERep/32/0-22162632/.CE_0-22162632/">http://rock.uswc.uswest.com/CERep/32/0-22162632/.CE_0-22162632/</a>.</li> </ul>





[TOP](#)

**Acknowledgement:**

By signing this form you are acknowledging that you have read and understand the YOUCAN guidelines stated above.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_ Elect Not to Sign: \_\_\_\_\_

\_\_\_\_\_  
Manager/Supervisor Date: \_\_\_\_\_