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## **THE CARE DEPARTMENT BIBLE.**

This is a documentation which involves every process and activity that goes on around the Care Department at SafeBoda. The document includes the tools used in the Department, the Issues handled by the different agents in the department and how to solve such issues.

### **CUSTOM ER HANDLING**

#### **The Five Pillars of Great Customer Care.**

##### **PASSION - What does this look like? Do a demo and practice in meeting**

Customers need to know that you are fighting for them and that their satisfaction is important to you. This can be seen/heard in the tone of voice, energy, and attentiveness to listen.

##### **EMPATHY - What does this look like? Do a demo and practice in meeting**

Empathy is the ability to understand and share the feelings of another. Customers need to realize that you truly understand what they want and know that you have put yourself in their shoes.

##### **COMMUNICATION - What does this look like? Do a demo and practice in meeting**

As a call center, Communication is our priority. Always communicate with the customers about what is being done and never leave a customer hanging wondering what has been done or what is being done to help them.

##### **ACTION - What does this look like? Do a demo and practice in meeting**

If a customer feels like we don't care about certain problems, they won't bother using the system again (ordering again, Sending or any other). You need to explain to them

what we are going to fix the problem, so they know we take the business seriously and are not just trying to shut them up. Give them the time frames and make sure the issue is resolved. It's always good to under promise and over deliver than vice versa.

### **PERSONALISATION - What does this look like? Do a demo and practice in meeting**

Humans always want to communicate with humans simply because they feel connected to each other. For every encounter you have with a customer, Always make them feel welcome and at home. Carry the customer from a place of being a mere customer to being a friend. Things to always do;

- Always introduce yourself to the customer.
- Always politely ask for the customer's name.
- While in the conversation, always refer to the customer by their name.

### **Keys to Great Customer Service**

- **Attitude - ATL vs BTL**

Caring. Solution driven. Having empathy. Being positive. Being friendly and cheerful. Having energy. Being on-stage. Attitude is the cornerstone of Outstanding customer service, and contrary to popular belief, you can influence it.

- **Interest - Precision Listening + Playback**

100% Customer-focused. Asking questions. Listening. Personalizing the relationship. All of our actions need to convey to a customer that they are important to us. The research tells us that over 80% of service failures come from the perception that you just don't care.

- **Action - "Here is what I can do for you"**

Taking ownership. Solving problems. Being creative. Following through. Following up. When customers see you being proactive or taking immediate action to ensure their satisfaction, they consider this a positive experience. The research shows that over 90% of customers consider "taking ownership" as the primary factor in the "WOWcx" customer experience.

- **Verbal Language - get data on the negative words they're using and show positive version**

Using positive words & phrases. Avoiding negative language. Communicating accurately. Communicating appropriately. Managing expectations. Our language skills play a key role in delivering Outstanding Customer Service.

- **Body Language - ATL vs BTL body language, give examples**

Face. Smile. Eyes. Posture. Movement. Attire. Even when our mouths aren't speaking, our body is.

- **Tone of Voice - ATL vs BTL tone of voice, give examples**

Persuasion. Influence. Empathy. Energy. These are conveyed through the five controllable attributes of voice: Speed, Pitch, Loudness, Intonation and Timbre. It's not what you say, but how you say it.

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## **PROCEDURES ON HOW TO TROUBLESHOOT CUSTOMER ISSUES**

### **Overcharge:**

-In case the customer complains about double crediting,

- Kindly apologize for any inconvenience caused.
- Ask for the customer details(Number, name, and date)
- Ask for the riders SBn No(In Case the customer knows it) and trip details. Confirm these details from the portal.
- Kindly ask the customer to give us 24 hours to follow up their issue and get back to them but resolve as soon as possible
- Every agent should fill in the CRM for every issue raised.
- Only agents on Level 2 are able to credit customers if they confirm an overcharge
- All B2B customers and staff credit will be credited by the B2B relationship manager **ONLY**

### **Standard Procedure On Beyonic Transactions:**

Incase the customer has a pending transaction of beyonic,

- Apologize for the inconvenience caused.
- Ask the customer to send you screenshots or forward to you the message for a successful transaction.
  - Look out for the transaction id
  - Look out for the dates and cross-refer with the Beyonic portal
  - Always forward the issue to Senior Associates on level 2 when you are not sure
- Always fill in the CRM with clear details
- Ask the customer to give us 24 hours for their issue to be worked on and money refunded to them(The refund can be done immediately if we have all the details that we need)

- Keep the credited accounts and visit the accounts again as they may be credited two times.

### **Standard Procedure on Rider started the trip earlier**

Incase the customer complained about the rider started a trip,

- Kindly apologize to the customer
- Ask the customer for the rider's SBno/phone number and end the trip on the Dashboard.
- Record the rider details in the CRM and assign the issue to someone from the Performance team
- Incase money has been deducted from the customer account, inform the customer that they will be refunded within 24 hours but escalate the issue to Senior Associates on level 2. In such cases never debit the SafeBoda as this is a reserve of the Performance team.

### **Standard Procedure On Accidents**

Incase the customer complains about having an accident on a safeboda, and he/she requires reimbursements or treatment of any sort,

- Always apologize for the unfortunate incident.
- In a polite way, Inform the customer about our terms and conditions (Put a link that connects to our website. (terms and conditions) [terms and conditions](#))
- Get the customer details and what exactly happened.
- In case they insist, Please contact your immediate supervisor and escalate the issue.
- Track the issue in the CRM tool and escalate it to Karim (Performance team).

### **Onboarding customers (Both calls and msgs)**

Onboarding customers are our new customers, Some of these have downloaded the app but never used it while others have downloaded the app and used it at least once.

Our policy is that we should contact the customer after 7 days, 3 months & 6 months

#### **1. Downloaded but never used the app**

- Call customer

This shall be done by brand ambassadors every Tues and Thurs from 10am to 3pm

Draft a report at the end of the day.

- Total number of calls attempted
- Total number of successful calls
- Total number of missed calls

- Reasons why they have not used the app and highlight the most common reason.
- To customers who did not pick and those whose numbers were off, we send them a message

## **2. Downloaded and used the app**

- Send out On boarding msgs to all our first time customers.

### **Policy on Close the Loop**

With the loop, We are looking out for the customers who rated us 3 stars and below and would like to find out the reason why they rated us so low.

For all customers, Who rated us 3 to 1

- Agent should extract the data from close the loop report sent by the data analyst into the google sheet.
- An SMS will be sent out the next morning before 10 am by the morning agent on shift.
- A mini report should be sent out to the supervisor before end of shift containing
  - Total number of trips (General number)
  - Total number of ratings
  - Total number of ratings above 4
  - Total number of ratings below 3
  - Total number of ratings of 1
 (This should include percentages).
- Agent should call 10 customers without ratings to find out what happened.

### **Policy On Poor Customer Conduct (Rude/not paying)**

In case the rider calls in about being mishandled by a customer. This may include (Customer not paying, Customer being abusive/rude, Customer stealing from them, etc)

- Apologize to the rider and let him know that something will be done about it.
- Report the issue in SugarCRM for follow up.
- Call the customer to find out the whole story of what happened.
- In case agent on level 1 can't handle, Forward to the Senior Associate on Level 2.

## **TROUBLESHOOTING STANDARD PROCEDURES**

### App crushing

- check the latest version of the app
  - What is the last thing you saw before the app crashed(Then forward immediately to the product team)
- Uninstall and reinstall the latest version of the app

If the app is still crashing after ...please forward to the Product team.

### App freezing

Normally an issue with the phone itself(memory)

- close all apps running and try again.

Android: phone setting<app settings<safeboda app<storage<Clear Data>then try again.

### Can't successfully pair

- Keep on trying until it works
- Refresh your network and the riders network
- Try to request if pairing has totally refused.

### Failure to input right payment mode

- Forward issue to product team

### App stuck on the old trip

Always confirm if the customer has enough data

IOS;Force close and try again

Android; phone setting<app settings<safeboda app<storage<Clear Data>then try again

### Can't load credit(transaction pending)

Forward that to engineering team

### Pending Purchase Of Credit

Android: phone setting<app settings<safeboda app<storage<Clear Data/Cache>then try again.

Trip History not displaying (Usually IOS users)

Android: Log out & log back in of the app

Android: phone setting<app settings<safeboda app<storage<Clear Data/Cache>then try again.

## **SCRIPTS FOR CUSTOMER SERVICE FOR ADDRESSING DIFFERENT STAKEHOLDERS.**

### **CUSTOMER- OUTBOUND**

When calling a customer about any issue,You should always have it in mind that the customer could be busy,travelling or even engaged.The focus should be to make the conversation as short as possible.

**CS Agent:** Hello Brenda,My name is Mercy and I am calling in from safeboda.

Hello. This is Brenda calling from SafeBoda. Am I speaking with (user's name)?-

**Customer;** Yes

**Cs Agent;** Do you have a minute to chat?/Are you able to talk briefly?

Great. The reason why I'm calling today is to learn about your experience with our new SafeBoda app and see how we can help make it an even better experience. We are making 50 calls a day, so it will only take 3 minutes. Do you have a few minutes to talk?

**Customer:**

If yes;Agent goes on about the issue why they have called

Great.... Use sales talk

If No;Can I kindly call you back later? And at what time?

No problem. When would be a good time to call you back?

**CS Agent;**Thank you for your time.Have a great day.

### **CUSTOMER-INCOMING:**

CS Agent: "Thank you for calling Safeboda, Brenda speaking, how may I help you?"

Customer: "Yes(Customer mentions their problem)"

CS Agent: Use playback here. "Ooh okay,May I please get your name and your phone number?"

Customer: "My name is Mercy and my number is 0794515330."

CS Agent: "Ok, kindly give me a minute to check out your details in our system.

(Incase it's taking longer than expected or you need help from someone else.

CS Agent: "Can I kindly call you back in a moment since it's taking longer than I expected/Do you mind holding the line because....."

(Problem resolved)

Customer: Thank you so much for the help./i will be waiting for your feedback.

CS Agent: Is there anything else I can help you with?

If yes? Okay.....agent asks the customer what they need.

If No? Thank you for using safeboda. Have a great day.

NB

The agent always waits for the customer to go off and then they turn off the call.

### **COLD CALLS(On boarding):**

Cold calls are a very important part of the after sales process and are a good way to sell.

This is how cold calls should be made:

CS Agent: "Hello Eva, this is Sandra calling in from Safeboda."

Agent must call the customer by name, and these names are known because they already exist in a database. This will help keep the attention of the customer as opposed to talking to a stranger.

CS Agent: "We noticed that you downloaded the app but you have not used it, Is there any reason why?"

"We noticed that you downloaded the app but you have not used it. I'm calling to see what challenges you are facing with the app." -Tara

(Agent is silent giving the customer a chance to hear from them) Use split attention and precision listening

Customer: "Customer gives their reason why" Use playback here.-Tara

(Agent should be able to answer any questions or help troubleshoot any issues. If not escalate in real time.

CS Agent: "Agent talks about any promotion working during the month and how the customer can enjoy it"

CS Agent: Thank you for your time and hope you enjoy your experience with safeboda.

Please feel free to contact us on our toll free number incase of anything.

### **CALLS INBOUND (LUGANDA)**

CS Agent: "Thank you for calling Safeboda, Brenda speaking, how may I help you?"

CS Agent: Webale kubila SafeBoda oyogerako ne Brenda, nkuyambye ntya?

Customer: "Yes(Customer mentions their problem)"

CS Agent: Use playback here. "Ooh okay, May I please get your name and your phone number?"

CS Agent: Kale sebo/nyabo, Osobola okunyambisaako ku linya lyo ne namba yo ey'esimu?



Customer: "My name is Mercy and my number is 0794515330."

CS Agent: "Ok, kindly give me a minute to check out your details in our system.

(Incase it's taking longer than expected or you need help from someone else.

CS Agent: Kale, kwatiliramu ko katonu nyo nga wenkebela wano mu system yaffe.

CS Agent: "Can I kindly call you back in a moment since it's taking longer than I expected/Do you mind holding the line because....."

(Problem resolved)

CS Agent: Mbadde nsaba lukusa nzilemu nkukubireko mu banga elitali ddene kubanga ensonga eno eyinza okuntwaliramu ko akabanga okugonjoola/ Mbadde nkusaba okwatiliremu ko edakiika emu ku line and bwengonjoola ensonga yo.

Customer: Thank you so much for the help./i will be waiting for your feedback.

CS Agent: Is there anything else I can help you with?

If yes? Okay.....agent ask the customer what they need.

If No? Thank you for using safeboda. Have a great day.

CS Agent: Waliwo ekirala kyenyanza okuyambamu sebo/nyabo?

Bwakiriza; .....genda mu maaso omubuuze ensonga eyo.

Bwagamba nedda; Webale nyo kukubila SafeBoda, beela bulungi sebo/nyabo.

NB

The agent always waits for the customer to go off and then they turn off the call.

## 5.2 #Ticket Type 2: SafeBoda

### Categories

App

Device Settings

Gadget

KyaKulya

Payment

General

Zero Trip

Fraud

## **App**

**These are issues that are app related .**

### **2 SBs matched with one customer (FTR):**

This is when a SafeBoda calls claiming that he got a ping but when he reached to pick the customer they were two SafeBodas that had come up for this very customer and when he took it he did not see the money and the trip is not there in his trip history.

- Ask for the SB number of the SafeBoda
- Get the customer number of the matched customer
- End the trip from the portal and tell the SB to pair again with the customer
- Report the issue in Product channel
- Close the issue in the CRM tool.

### **App automatically signed out (FTR):**

This is when the SB says his app has signed out and needs a password for his account .This mainly occurs when there is a need to update the gmail account or when we send out a forced update.

- Ask for the SB number of the SafeBoda
- Get to know when the issue occurred by probing the SafeBoda
- Guide him on how to log into the app using phone number
- Track the issue in the CRM tool and close it.

### **Failure to pair (FTR):**

This is where a SB is failing to get paired

- Get the SB number of the SafeBoda
- Probe to find out when the issue started and how many times
- Guide him through these simple steps; Open settings>Location>Scanning>Both WiFi and Bluetooth scanning have to be turned on.
- Track issue and close it in the CRM.

If this all fails, report the issue in the Product channel

**Failure to Start/ End trip (FTR):**

This is where the trip of a SafeBoda fails to end even when their data connection is flowing normally.

- Get the SB number of the SafeBoda
- Go to the dashboard and confirm his ride status.
- If he is failing to start the trip, probe him into checking whether he still has mobile data on their phone.
- If not, advise them to load more data on their phones (guide them in case they do not know how).
- If he is failing to end the trip, end the trip from the dashboard
- If the trip is not ending despite all the above, slack the issue in the product channel clearly indicating the SB number of the SafeBoda whose trip is failing to end.
- Track issue and close it in the CRM.

**Incorrect earnings (FTR):**

This is when the balance in the transactions of a SafeBoda are not accurate While following the amount charged on each trip in the trip history.

- Get the SB number of the SafeBoda.
- Probe the SB about which date this happened.
- Check the transaction on the SB Portal on the Transactions section.
- If its true, slack the issue in the SB Payments channel to be followed up by the finance team.
- If its not true, then track the issue in the CRM tool as; SafeBoda>SB General Issues>SB Balance Ignorance.

**No Trip History (FTR):**

This is the disappearance of the Trip history from a particular SafeBoda's app.

- Get the SB number of the SafeBoda.
- 1Confirm from the portal if you can access his trip history.
- Probe the SB when this happened.
- Inquire from the SB if he has a valid data bundle running on his phone.
- Confirm from the leads or Senior Associates whether this is not a Product issue
- Track the issue in the CRM and close it.

**Ping Distance(FTR):**

This is when a SafeBoda keeps on getting pings from distant locations

- Get the SB number of the SafeBoda

- Probe him into knowing when he started experiencing this.
- Tell him to go to Settings>Apps>SafeBoda>Storage>Clear data
- Tell him to log into the app again with his phone number.
- Track the issue in the CRM too and close it.

### **Received a Ping in the middle of the Trip (FTR):**

This is a case when a SafeBoda gets a ping in the middle of a certain trip.

- Get the SB number of the SafeBoda
- Probe him to find out when it happened and how many times it has happened.
- Report the bug in product channel on slack
- Track the issue in the CRM and close it.

### **Stuck on a trip(FTR):**

This is when a SafeBoda completely fails to get pings because his app still shows that he is still on the previous trip.

- Get the SB number of the SafeBoda
- Go to the SB Portal and end the trip
- If it fails, slack the issue in the Product channel on slack.
- Track the issue in the CRM and close it.

### **Trip auto ending (FTR/NFTR):**

This happens when a SafeBoda is taking a given trip and when he reaches the destination, on checking the app, it shows that the trip already ended on its own.

- Get the SB number of the SafeBoda.
- Probe him while actively listening to how he narrates how it happened. In most cases, it's the SafeBoda who has unknowingly ended this trip.
- If it's not a general technical problem with the App, advise the Safeboda to always be vigilant with his phone next time so that he does not tamper with its screen while riding.
- Track the issue in the CRM and close.

If it's a general technical problem, escalate the issue to a Senior Associate on level 2 for a trip correction.

Track the issue in the CRM and assign it to level 2.

### **Trip showing details of the Previous trip(FTR):**

This is where the App of a given SafeBoda still shows the details of the trip he had taken earlier before he took the current one.

- Get the SB number of the SafeBoda
- Probe him to know which trip he is still seeing on his screen.
- Confirm from the portal if the trip he is talking about successfully ended.
- If it ended, then advise the SafeBoda to clear his SafeBoda storage through the following steps; Settings>Apps>SafeBoda>Storage>Clear data, then he logs back into the app.
- Track the issue and close it in the CRM.

**Unable to Accept ping (FTR):**This is a situation when a SafeBoda fails to accept all/most of the incoming pings.

- Get the SB number of the SafeBoda.
- Probe the SB to find out when the issue started and its frequency.
- Carefully find out whether the issue is not as a result of a fault on the screen of the SafeBoda's phone.
- If the issue has been persistent and the problem is not with his phone screen, report the issue in Product channel on slack.
- Track the issue and close it in the CRM tool.

### **Unfair distance-Overcharged(NFTR):**

This is where a Safeboda takes a trip and on reaching the destination, the app has actually charged above the estimated trip cost.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB to find out the date and time when the trip happened. Also find out if the SafeBoda went to other locations besides the ones the customer had included initially.
- Get the details of the trip including the pick up and drop off locations, time and date and the **TRIP ID** of that trip.
- Notify the SafeBoda that his issue will be worked upon within the next 24 hours.
- Track the issue in the CRM and assign it to level 2.

#### **Level 2**

- Go to the Portal and enter the location points (pick up and drop off) in the google maps.
- Enter the distance from google maps and time taken by the trip recorded on the SB Portal in the pricing calculator, carefully considering the time of the day when the trip happened.
- If there is a correction required for that trip, debit the SB from the SB Portal with the correct reason.

- Change the status of the issue in the CRM tool to Closed.
- Contact the SB to notify him about the debit which was made to his account for the given trip.

### **Verification code not working:**

This happens when the verification code received by a particular SafeBoda when they have signed in is not correct/ not functioning.

- Get the SB number of the SafeBoda
- Go to the SB Portal on the Profile section and read for them the verification code which is appearing there.
- Track the issue and close it in the CRM tool.

### **Unfair distance-Overcharged(NFTR):**

This is where a Safeboda takes a trip and on reaching the destination, the app has actually charged above the estimated trip cost.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB to find out the date and time when the trip happened. Also find out if the SafeBoda went to other locations besides the ones the customer had included initially.
- Get the details of the trip including the pick up and drop off locations, time and date and the **TRIP ID** of that trip.
- Notify the SafeBoda that his issue will be worked upon within the next 24 hours.
- Track the issue in the CRM and assign it to level 2.

#### **Level 2**

- Go to the Portal and enter the location points (pick up and drop off) in the google maps.
- Enter the distance from google maps and time taken by the trip recorded on the SB Portal in the pricing calculator, carefully considering the time of the day when the trip happened.
- If there is a correction required for that trip, credit the SB from the SB Portal with the correct reason.
- Change the status of the issue in the CRM tool to Closed.
- Contact the SB to notify him about the credit which was made to his account for the given trip.

### **Not getting pings:**

This happens when the SafeBoda is in online mode and has spent a meaningful amount of time without receiving any pings.

- Get the SB number of the SafeBoda.
- Confirm from the portal to find out when he last took a trip.
- Probe him to find out where he is currently staging.
- Advise the SB to get to nearby busy towns or trading centers.
- Track the issue in the CRM tool and close it.

### **-Customer Issues:**

These are customer related issues and they happen because of customer mistakes.

#### **Customer cancelled**

This is when SafeBoda reports a customer who cancelled them yet they he had reached or almost reached the pick up location.

- Get the SB number of the SafeBoda.
- Apologize to the SafeBoda for the bad experience from the customer.
- Advise the SafeBoda to cancel the trip and wait for another ping.
- Track the issue in the CRM and close it.

#### **Customer Phone off**

This is when a SafeBoda reports a customer whereby their phone number is off. This could happen under the following scenarios;

When the SafeBoda accepts a ping and the customer's number is off.

When the SafeBoda reaches the pick up location and when he calls the customer's number, it's off.

- Get the SB number of the SafeBoda.
- Apologize to the SafeBoda for the bad experience from the customer.
- Advise the SafeBoda to cancel the trip and wait for another ping.
- Track the issue in the CRM and close it.

**Customer Price Ignorance(NFTR):** This is when the customer claims that the trip cost is expensive yet its the actual amount they are supposed to pay.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SafeBoda to know the date and time the trip happened.
- Get the trip details from the Portal and track them while also including the TRIP ID of that given trip.
- Track the issue in the CRM tool and escalate it to level level 2.

#### **Level 2.**

- Recalculate the trip using google maps and the pricing calculator.

- Contact the customer to notify them that the trip charge was fair.
- Close the issue in the CRM tool.

### **Forgot to switch to cashless (NFTR):**

This is when a customer who has a given cashless balance mistakenly chooses cash as the mode of payment when requesting for a SafeBoda and when their trip has ended, they realise that the trip charged cash.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB to find out the date and time when the trip happened.
- Get the trip details from the SB Portal including the Trip ID.
- Confirm from the customer section if they have enough cashless on their account.
- Notify the SB that the issue is going to be resolved within 24 hours.
- Contact the customer and inform them that their cashless will be deducted to compensate for SafeBoda.
- Track the issue in the CRM tool and assign it to level 2.

#### **Level 2**

- Credit the SafeBoda from the SB portal and debit the customer for the trip using the correct reasons.
- Contact the SafeBoda and customer and notify them about the crediting and debiting simultaneously.
- Close the issue in the CRM tool.

### **Fraudulent customer(NFTR):**

This is when the SafeBoda reports a customer for deceptive behaviour or conning him/her into the following; taking malicious trips for his own gain, tricking him to steal his phone, bike or asset or any other unusual activity a customer might indulge a SafeBoda into in order to gain monetary advantage over him.

- Get the SB number of the SafeBoda.
- Probe the SafeBoda to find out how it all happened while ACTIVELY LISTENING and PLAYING BACK to get all the important details from the SafeBoda.
- Find out from the portal the details of the customer.
- Apologize to the SafeBoda for the poor experience from the customer.
- Track the issue in the CRM and assign it to level 2.

### **Rude(FTR):**

These differ from the merely unhappy in that they can't control their anger. They are unreasonable, unfriendly, and prone to using verbal abuse, offensive language and threatening behavior.



- Get the SB number of the SafeBoda.
- Probe the SafeBoda to know what the customer actually said/did to him.
- Get the details of that particular customer.
- Contact the customer and warn him/her about the manner in which they handled the SafeBoda.
- Track the issue in the CRM tool and close it.

### **Unpaid cash trip(NFTR):**

This is when a SafeBoda calls reporting a trip he has taken and the customer refused to pay or did not have cash and the trip has charged cash not cashless.

#### **Level 1**

- Get the SB number of the SafeBoda
- Probe the SafeBoda into when the trip happened.
- Get the details of the trip from the SB Portal including the TRIP ID.
- Go to the customer section and check if they have any cashless on their account.
- Notify the SafeBoda that his issue will be resolved within 24 hours.
- Track the issue in the CRM tool and assign it to level 2.

#### **Level 2**

- Contact the customer and probe him/her into why they did not pay for the trip.
- Credit the SafeBoda the supposed trip charge and record the customer in the Misbehaving customer sheet.
- Close the ticket in the CRM tool.

### **Wrong pick up location (FTR):**

This happens when either the customer has swapped their pick up and drop off locations and they get a SafeBoda from that location or when the customer just typed a wrong location from where they are currently located.

- Get the SB number of the SafeBoda.
- Advise the SafeBoda to cancel the trip and wait for another ping.
- Track the ticket in the CRM and close it.

### **-Device settings.**

#### **Installing app/ Updating app**

This is when a SafeBoda wants to install for them the SafeBoda App on their phones or Updating the version of the app they are using to the latest version.

- Get the SB number of the SafeBoda

- Go to Google Play store, type 'SafeBoda drivers', download the app, and help the SafeBoda sign in.
- Track the issue in the CRM tool and close it.

### **Phone set up**

This is when a SafeBoda's device has been reset to factory settings and requires setting up until its ready to be used by the SafeBoda.

- Get the SB number of the SafeBoda.
- Go to the SB Portal and obtain the gmail address of the SafeBoda.
- Go to settings>Accounts>Add account>Google>Enter the email and password (0800300200)>Go to Play Store and download the app. Install the app and help the SafeBoda sign into the app.
- Track the issue and close it in the CRM.

### **Social media set up(FTR):**

This is when a SafeBoda wants to get assistance on how to install Facebook, WhatsApp or Twitter on their devices.

- Get the SB number of the SafeBoda.
- Go to Playstore and download the social media app they want.
- Install the app on the phone of the SafeBoda.
- Track the issue in the CRM tool and close it.

### **Updating location set up(FTR):**

This is when SafeBoda wants to update their google maps.

- Get the SB number of the SafeBoda.
- Go to playstore and type 'Google Maps'
- Tap on the 'update' button and wait until it's done updating.
- Track the issue in the CRM tool and close it.

### **-Gadget**

#### **Lost Phone(FTR):**

This is where a safeboda comes in reporting that he has lost his phone and is requesting us to get him a new phone and pay in installments.

- Sympathize with the SafeBoda.
- Advise him on how to be careful with his device next time.
- Advise him to report the issue to the Police so that they can give him a police statement to help him recover his lines.
- Tell the SB that they can not be given a new phone by the company in case they lost the old one.
- Track the issue in the CRM tool and close it.

**Stolen phone:** This is where a safeboda comes in reporting that his phone was stolen and is requesting us to get him a new phone and pay in installments.

This is where a safeboda comes in reporting that he has lost his phone and is requesting us to get him a new phone and pay in installments.

- Sympathize with the SafeBoda.
- Advise him on how to be careful with his device next time.
- Advise him to report the issue to the Police so that they can give him a police statement to help him recover his lines.
- Tell the SB that they can not be given a new phone by the company in case they lost the old one.
- Track the issue in the CRM tool and close it.

**Service center issue(FTR):**

This is when a SafeBoda returns the phone which was given to him by the company for repair when its warranty is still valid. This can only be confirmed by Juma in the technical section.

- Get the SB number of the SafeBoda.
- Get the phone type of the SafeBoda.
- Track the issue and close it in the CRM.

**-Payment**

**Finance error**

This is when Finance makes a mistake and makes a wrong deduction on the account of a particular SafeBoda.

- Get the SB number of the SafeBoda.
- Probe the SB to find out when the issue happened.
- Check on the portal and confirm whether there was a mistake in that particular transaction.
- Slack the issue in the SB payments channel on slack.
- Track the issue and close it in the CRM tool.

**Package loan balance**

This is when a SafeBoda is inquiring about the remaining balance on his loan package.

- Get the SB number of the SafeBoda.
- Check the SB Portal on the loan section to find out the remaining loan balance and read it for him.
- If the loan balance is 0, advise the SafeBoda to come to the Walkin to get a receipt issued to him.

- Track the issue and close it in the CRM tool.

### **Package loan completion**

This happens when a particular SafeBoda has completed his/her package loan and wants a receipt issued to him.

- Get the SB number of the SafeBoda.
- Check the SB Portal on the loan section to find out the remaining loan balance.
- If the loan balance is 0, advise the SafeBoda to come to the Walkin to get a receipt issued to him.
- Track the issue and close it in the CRM tool.

### **Wrong Loan Balance.**

This is when the loan added on the loan section on the account of a particular SafeBoda does not correspond to the amount he signed for in a particular contract.

- Get the SB number of the SafeBoda.
- Check on the loan section on the SB Portal to confirm the loan amount appearing there.
- Slack the issue in Sb payments channel.
- Notify the SafeBoda you are following up on his issue and it will be closed within 24 hours.
- Track the issue and close it in the CRM.

### **Change Payment Number.**

This happens when a particular SafeBoda wants to change the number which finance sends the weekly payment.

- Get the SB number of the SafeBoda.
- Probe him into why he is changing his payment number.
- CLEARLY confirm from him that the number he is forwarding is registered under his name on Mobile money.
- Enter the new number in the Payment Numbers sheet while clearly indicating his name, date and name of entrant.
- Notify the SafeBoda that the Finance Department will approve his new number within the next 24 hours (Only applicable from Monday to Friday).
- Track the issue and close it in the CRM tool.

### **Daily Bonus not received**

This happens when a SafeBoda qualifies to get a daily bonus for a particular day but did not receive it.

- Get the SB number of the SafeBoda.

- Confirm from the order history of the previous day to check how many trips the SB took and if he qualifies to get the bonus.
- Confirm from the SB Portal in the transactions section if the SB did not receive the bonus.
- Check in the fraud tracker to find out if the SB was enlisted under fraud.
- If you have failed to trace the reason for the SB not getting a daily bonus, then slack the issue in the SB payments channel to be worked on by the Finance team.
- Notify the SB that you have forwarded his complaint to the Finance team and his issue will be resolved in the next 24 hours.
- Track the issue in the CRM and close it.

#### **Pay Me failing to Transact**

This happens when a SafeBoda who has above 20,000 on their account is making a transfer to the PayMe number but it's failing to go through.

- Get the SB number of the SafeBoda.
- Confirm from the portal if their cashless transfer feature is active.
- Report the issue in the Product channel.
- Track the issue in the CRM tool and close it.

#### **Pay Me Money not received after 24 hours.**

This happens when a SafeBoda who made a transfer to PayMe between Monday to Thursday has not received their payment.

- Get the SB number of the SafeBoda
- Confirm from the Portal on the transactions section to see when the SB made the transfer.
- Report the issue in the Sb payments channel on slack.
- Notify the SB that you have forwarded his issue to the finance team and it will be resolved within 24 hours.
- Track the issue in the CRM tool and close it.

#### **SB-General Issues:**

These are the normal issues that happen from the SafeBodas themselves not even app related or related to anything but caused from their side may be as a result of being ignorant about something, or not knowing how something happens.

#### **Accident:**

This is when a SafeBoda reports getting into an accident while on a trip or while he was going to pick up a customer.

- Sympathize with the SafeBoda for the incident.
- Find out if a customer was involved. If yes, find out customer details and how both customer and SafeBoda are doing.
- Find out where and how the accident happened.
- Find out if the SafeBoda is insured with Turaco. If yes, advise him to go to a health center and get treatment then bring the stamped bills to the Wellbeing desk at SafeBoda academy.
- If the customer is not well, forward the issue to Brenda Nambogo to follow up with the customer.
- Track issue in the CRM and assign to Karim to follow up with the SafeBoda.

**Double reporting:** This is when a SafeBoda is following up on an issue he had previously reported and has not yet been solved.

- Check the CRM under the SafeBoda's account and find out if the issue was really reported by the SafeBoda and tracked by an agent.
- Read through the issue and find out why it is still pending.
- Reachout to the agent that left the issue pending and find out the reason why it is pending if not clear in the CRM. Or, coordinate with the agent in charge and close the issue if you can. ( most appropriate if both agents are level 2 agents)
- If the issue still needs further follow up (as said by the concerned agent), kindly ask the SafeBoda to be patient and give him a time frame of 24hrs if necessary.
- Track issue in the CRM as Double reporting still, and close it with the appropriate closure note.

**Family obligations:** This is when a SafeBoda reports that he might fail to work for a given period of time due to personal or family responsibilities.

- Sympathize with the SafeBoda if the reason is emotional or conflicting.
- Find out from the SafeBoda the length of time he will be off work.
- Track the issue and assign it to Kathim. (Performance).

**Forgot to Start trip:** This is when a given SafeBoda takes a trip and on reaching the drop off location, he realized that he forgot to start that particular trip.

- Find out from the SafeBoda when the trip was, and the pick up and drop off locations.
- Ask the SafeBoda if it was a cashless or cash trip.
- Ask the SafeBoda if he was given any payment for the trip regardless of whether it was cash or cashless.

- If the SafeBoda says he did not get any payment for a cash trip, inform him that we shall contact the customer and find out more. This will make the SafeBoda tell you the truth about the payment if he was lying about not receiving any.
- If the SafeBoda says he did not get any payment for a cashless trip, inform him that we shall contact the customer and find out more. Contact the customer and if the SafeBoda was not paid, inform the customer that we will be debiting his/her account to credit the SafeBoda for the trip.
- Track the issue clearly in the CRM indicating the customer number in the description and assign to level 2 agent.

**Fraud Sanction Query:** This is when a particular SafeBoda is penalized for breaking a certain law and in most cases this penalty involves a deduction of a certain amount of money from their app balance.

- Find out from the SafeBoda when his account was sanctioned.
- Direct the SafeBoda to the performance team.
- Track the issue clearly and close it.

NB: Never mention the name of a particular Performance staff member a SafeBoda should go to. Furthermore, it is safer not to tell him the reason he was sanctioned. Your only role is to direct him to performance.

**Health sick:** This is when a particular SafeBoda fails to work for a given period of time because he/she is sick or has health complications which need to be attended to.

- Sympathize with the SafeBoda for the health complications.
- Ask him if he is on treatment and how he is doing.
- Inform him that the performance team will be informed about his being off work.
- Track the issue and assign it to Kathim, informing him that SBxxx will be off work because of health reasons.

**Inquiry:** This is when a SafeBoda is asking for information about a certain service in the company.

- Give the SafeBoda time to talk and ask exactly what he needs to know about the given service.
- Explain to the SafeBoda in a way easiest to understand highlighting all key points.
- Track the issue in CRM.

**Miss-Use of Equipment:** This is when a SafeBoda is reported for not using his equipment in the right way for example wrongly wearing a reflector, wearing a passenger app etc.

- Find out the details of the person who is reporting the SafeBoda for misuse of equipment. (if customer, get his or her phone number, if fellow SafeBoda, find out the helmet number)
- Get the helmet of the SafeBoda who is being reported.
- Find out which equipment in particular is the SafeBoda misusing.
- Find out where he was seen and when
- Track the issue and assign it to Kathim. (performance)

**Riding whilst Drunk or on Drugs:** This is when a particular SafeBoda is reported for taking trips while not in his sober state as a result of taking alcohol or using drugs.

- Find out the details of the person who is reporting the SafeBoda. (if customer, get his or her phone number, if fellow SafeBoda, find out the helmet number)
- Get the helmet of the SafeBoda who is being reported.
- Find out where he was seen and when
- Track the issue and assign it to Kathim. (performance)

**SB Balance Ignorance:** This happens when a given SafeBoda cannot understand the flow of his app balance.

- Find out from the SafeBoda when he stopped understanding the flow of his balance.
- Check whether there was any debit on his earnings (loan, sanctions, hairnets, insurance) that he did not notice.
- If there was no debit on his account, check whether the earnings turned to negative because of commission deduction when he had a less balance. If yes, explain to him the whole process how it became negative
- If there are no errors at all, try and understand the flow of the balance and explain it in the easiest and simplest way possible.

**SB App Ignorance:** This is where a particular SafeBoda does not know how to use some features of the SafeBoda app. Make sure you are familiar with the app so as to avoid mumbling and confusing the SafeBoda more.

- Find out from the SafeBoda which feature he is talking about.
- Take the SafeBoda through the steps on how to use the given feature in the simplest and precise way.

**SB Payment Ignorance:** This happens in case a SafeBoda has received a certain payment from the office for example weekly payment, trip price corrections but he still claims that they are not seeing it.

- Take time to ask which payment exactly the SafeBoda is complaining about.



- Search the transactions from the portal to find the payment.
- Once found, tell the SafeBoda the previous balance he had before the payment was made and tell him the date too.
- Then explain to the SafeBoda the addition on his earnings that reflected on his account after the payment.

**NB:** In this case you have to use the portal to see when the transaction happened for payment from the office ,weekly payment sheet to see if Finance has indicated has really paid him.

**SB Price Ignorance:** This happens in case SafeBoda claims that he got less money than what he had anticipated for but when you enter the trip details in the pricing calculator, it shows that the trip was a fair trip.

- Ask for the SB number and enter it in the CRM to get the issue.
- Once flagged off as fair, explain to the SafeBoda that the trip was fair based on the time taken, distance and hour of the day.

**Suggestions:** This is when a SafeBoda fronts an idea to put forward for consideration.

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**Suspended/Deactivated:** This is when the SafeBoda can not login or use their app because he/she was deactivated from the app as a result of breaking a certain rule.

**Took Wrong customer:** This is when a SafeBoda picks up a customer they were not meant to take.

**Traffic Offence:** This happens when a SafeBoda breaks some of the traffic rules like not stopping at red traffic lights, riding on pavers etc

**Using 2 Apps:** This happens when a particular SafeBoda is caught or reported for working under SafeBoda and either of the company's competitors for example Uber, bolt etc

**Wrong SB info:** This is when the details of a particular SafeBoda were wrongly written for example their Full Names, App name not matching with reflector name etc

**Needs Device Training:** This is when a SafeBoda does not know how to use certain useful features of their Smartphones.

**Does not want Rounding off:** This is when a SafeBoda claims that they are not comfortable with the current rounding off.

**Attacked by Robbers at Night:**This is when a Safeboda reports/ reported to have been attacked by thugs during night hours.

**Attacked by Non Safebodas at Night:**This is when a SafeBoda reports/ reported to have been attacked a certain bunch of non safebodas and caused harm or confiscated some of his equipment.

**Spotted carrying 2 passengers:**This is when a particular SafeBoda is reported while riding with two passengers.

**Lost Equipment:** This happens when a SafeBoda has lost any of his equipment for example helmet, reflector.

**Wants to join:**This is when a non safeboda inquires about how to join the community as a SafeBoda.

**-Zero Trip:**

This is when a given trip charges zero as a result of that particular trip triggering one of the set fraud rules.

**Is Distance greater than 100kms:**

This is a rule set that for a trip to be taken on the app, the distance should not exceed 100kms and once it exceeds it will charge zero cost.

**Is Distance less than 150m:**

This is a rule set that for a trip to be taken on the app,the distance should always be above 150m and not below and if below it will charge zero.

**Is Duration greater than 8 hours:**This is a rule set that for a trip to be taken on the app,the time taken should not exceed 8hrs and once it exceeds it will automatically charge zero.

**Is Duration Less than 2 minutes:**This is a rule set that for a trip to be taken on the app,the time taken should be above 2 minutes and if less than that it will automatically charge zero.

**Is Speed greater than 50km/hr:**This is a rule set that for a trip to be taken on the app,Speed should not exceed 50km/hr and if it exceeds it will automatically charge zero.

**Is Speed less than 1km/hr:**This is a rule set that for a trip to be taken on the app,Speed should be above 1km/hr and if it is below it will charge zero.

NB: If all these happen, you have to go to the portal, open the trip details, find out the distance, time, speed, after confirming with the customer if the ride happened and then talk to a customer about what he/she was supposed to pay and if accepts fine if does not give the SB the money for the trip or ask for assistance if it seems so completed from a senior member or lead.

### **Level 1**

- Get the SB number of the SafeBoda
- Probe him into the time and date when the trip happened.
- Enter the SB number in the SB Portal and check that trip from the order history section in the SB Portal.
- Capture the trip details that is pick up location, drop off location, date, time, TRIP ID clearly indicating the reason for the zero trip depending on defined fraud rules as the sub category.
- Probe the SB how much they were paid by the customer.
- Notify the SB that their issue will be resolved within 24 hours.
- Track the issue in the CRM tool and assign it to level 2.

### **Level 2.**

- Contact the customer to confirm if they paid any amount of money to the SafeBoda.
- Notify the customer about how much the trip would have cost.
- Credit the SafeBoda and ONLY debit the customer if they are on cashless and you have notified them about debiting their account.
- Close the issue in the CRM tool.

### **-Fraud**

#### **Self pair**

This happens a particular SafeBoda pair with his customer account to take particular trips.

#### **Pair fellow SB**

This is where a particular SafeBoda pairs with another SafeBoda's customer account to take certain trips.

#### **Repeat Customer**

This happens when a particular SafeBoda keeps on having repeated trips with a particular customer.

- Get the SB number of the SafeBoda.
- Check in the Fraud tracker to find out the reason for the fraud.
- Track the issue in the CRM tool and escalate it to Kathim in the Performance team.

**NB:** If all these happen, please invite the Safeboda to see the performance office and you should always inform the performance office first.



## 5.1 #Ticket Type 1: Customer

### Categories

Account settings

General

Payments

Pricing

Product

SafeBoda

### -Account Settings

Change Phone number.

- Confirm from the customer the number they use on the app.
- Enter the number in the SB Portal on the customer section.
- Probe the customer to find out why they want their phone number changed.
- Edit the number from the Portal.
- Create a ticket in the CRM tool and close it.

Deactivation request

Confirm from the customer the number they use on the app.

Enter the number in the SB Portal on the customer section.

Probe the customer to find out why they want their account deactivated.

Notify the customer that their issue will be resolved within 24 hours.

Request to Transfer cashless.

### -General

App Education

Follow up

Geofence Suggestions

Inquiries

Negative Feedback

Positive Feedback

### -Payments

Beyonic failures

MTN Mobile money failures

Promo code queries

Top up not reflecting

Pending Transaction

### **-Pricing**

Discount not applied

Price Ignorance

Trip Overcharge

Trip undercharge

Does not want rounding off.

### **-Product**

App failing to end trip

Dispatched to 2 SBs

Failure to login

Failure to pair

Infinite search

Price Estimate error loading

Stuck on rating screen

Stuck on splash screen.

Unable to change number.

Verification code not working.

Zero trip

Stuck on previous trip

No trip History.

### **-SafeBoda**

Cancelling the trip

Cleanliness

Ending trip before destination.

Forgot to start the trip.

Lying about mode of payment.

Mechanical failure.

No hairnets.

Phone battery dies.

Poor customer service.

Poor equipment.

Refuelling on trip.

SB delays to end trip  
SB device app training  
SB lies about Trip Price  
SB not calling  
SB refusing to take cashless trips.  
SB refusing to transact  
SB slow/ longer routes.  
SB Traffic offense  
SB with no change  
Unsafe Driving  
Wrong Customer  
Failing to get a SafeBoda  
Start stop trips.  
SB starting trips before arriving  
SB starting trip and does not show up.  
Forgot items with SB.

#### **-Incident/ Accident**

Accident including death  
Minor accident  
Loss of property on trip  
Attacked by robbers at night.

#### **#Ticket Type 3: Fintech**

##### **Categories**

Cashless Transfer  
Insurance  
Savings  
Gas  
Spare Parts  
Watu Bike Loan  
Spare Parts.  
Solar  
Airtime  
Mpola ko Loan



## **-Cashless Transfer.**

### **Activate Feature (FTR):**

This is when a SafeBoda cannot do any cashless transfer because their cashless feature is not active. In most cases this feature is inactive because a SafeBoda has defaulted a weekly loan repayment for a particular week.

- Get the SB number of the SafeBoda.
- Check on the Profile section of the SB Portal to confirm if the feature is inactive.
- Advise the SB to first reach out to the finance desk which is situated in the Support Walkin.
- Track the issue and close it in the CRM.

### **Credit did not reflect on the Customers app.**

This happens when a SafeBoda has made a transfer from his/her account but the transaction does not reflect on the customer's side yet the cashless was deducted from the SafeBoda's account.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into when the date when he made the transfer.
- Get the customer name and number and confirm to see if the cashless did not reflect on the side of the customer.
- Inquire from a Senior Associate if it's not a general issue or else report the issue in the Product channel on slack.
- Notify the SB that you are following up on the issue and it will be rectified within 24 hours.
- Track the issue in the CRM and assign it to level 2.

#### **Level 2**

- Follow up the issue by finding out from Product the way forward for that particular issue.
- Resolve the issue according to what the Product team advises.
- Contact the SafeBoda and customer and give them a way forward for how you have resolved that particular issue.
- Close the ticket in the CRM tool.

### **Customer did not pay**

This happens when a SafeBoda has successfully made a transfer to the customer's account and then the customer refuses to give him cash due to a certain reason.

#### **Level 1**

- Get the SB number of the SafeBoda.

- Get the details of that particular transaction from the SB Portal including the customer's number.
- Notify the SB that the issue will be resolved within the coming 24 hours.
- Track the issue in the CRM and assign it to level 2.

#### **Level 2**

- Probe the customer into why they did not pay the SafeBoda.
- Notify the customer about the consequences which come along as a result of such actions.
- Escalate the issue to the team if the amount to be credited exceeds 30,000.
- Track the customer's details in the Misbehaving Customer tracker.
- Close the issue in the CRM tool.

#### **Double Transfer(NFTR):**

This is when a SafeBoda has made a transfer to the customer's account or merchant two times instead of one.

#### **Level 1**

- Get the SB number of the SafeBoda
- Probe him into when the incident happened.
- Confirm the transfers from the SB Portal.
- Notify the SB that their issue will be resolved within 24 hours.
- Track the issue in the CRM tool and escalate it to level 2.

#### **Level 2**

- Contact the customer to notify them about the debit going to happen to their account.
- Debit the customer the excess cashless payment they received on their account and credit the Safeboda.
- Track the issue in the CRM and close it.

#### **Education Issue:**

This is when you the SafeBoda is ignorant about how to use the cashless feature and is educated about it.

- Get the SB number of the SafeBoda
- Inform him how to use the cashless feature.
- Track the issue and close it in the CRM tool.

#### **Forgot Pin**

This is when a SafeBoda has forgotten his/her transfer PIN.

- Get the SB number of the SafeBoda.

- Go to the Profile section on the SB Portal and generate a new PIN for the SafeBoda.
- Track the issue and close it in the CRM tool.

### **Self Transfer**

This is when a SafeBoda has transferred cashless to their own customer account.

#### **Level 1:**

- Get the SB number of the SafeBoda.
- Probe him into when he made the transfer.
- Track the issue in the CRM tool and escalate it to a Senior Associate.

#### **Level 2:**

- Reverse the transaction from the portal.
- Escalate the issue to the Performance team.

### **Sent Excess Payment**

This is when a SafeBoda has made a transfer which is more than what he/she was supposed to have sent.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into when he made the transfer.
- Check the SB portal and confirm the transaction from the transaction section.
- Notify the SafeBoda that his issue will be rectified within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Slack finance in the SB payments channel.
- Contact the customer and notify them about the excess deduction which is going to be made to their account.
- Reverse the transaction from the SB Portal including the commission the SB might have gotten incase the transfer was made to a customer account.
- Close the ticket in the CRM tool.

### **Sent to Wrong Number**

This is when a SafeBoda has transferred cashless to a number they were not meant to send to.

#### **Level 1**

- Get the SB number of the SafeBoda
- Probe him/her into when the transaction happened.
- Check the SB Portal to confirm the transaction.

- Notify the SafeBoda that their issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it level 2.

## **Level 2**

- Contact the customer/safeboda account to which that excess payment was sent to.
- Probe the wrong account and probe them into the matter and find out if have not yet used the cashless.
- Reverse the transfer on confirmation from the recipient account owner and credit it back to the SafeBoda account.
- Contact the SafeBoda and notify them about the reversal.
- Close the ticket in the CRM tool.

## **-Insurance**

### **Double Deductions**

This is when the SafeBoda is deducted more than once for insurance in a particular month.

- Get the SB number of the SafeBoda.
- Probe them into when the double deduction happened.
- Confirm from the SB Portal about the double deduction and CAREFULLY note the dates of the month when it happened.
- Slack the issue in the Financial services channel.
- Notify the SafeBoda that their issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

## **Level 2**

- Follow up the issue from the portal and find out if Finance corrected the transaction.
- Close the ticket in the CRM tool.

## **Inquiry**

This is when a SafeBoda is inquiring about how Insurance( Turaco) works.

- Get the SB number of the SafeBoda
- Educate them about Turaco insurance.
- Create a ticket in the CRM tool and close it.

## **SB Wants to Quit**

This is when a SafeBoda wants to terminate their Turaco Insurance contract.

- Get the SB number of the SafeBoda.

- Probe the SafeBoda into why he wants to quit the Insurance policy.
- Advise him to come to the SafeBoda Academy and go to the Turaco tent to be given a termination contract.
- Create a ticket in the CRM tool and close it.

### **SB Wants to Redeem Insurance**

This is when a SafeBoda wants to claim his insurance money in case he has evidence that he was involved in an accident.

- Sympathize with the SafeBoda for getting into an accident.
- Get the SB number of the SafeBoda.
- Advise the SafeBoda to come to the SafeBoda Academy to the Turaco tent with the medical receipts and pictures of the injuries.
- Create a ticket in the CRM tool and close it.

### **Wrong Amount Deducted**

This is when a SafeBoda is deducted any other amount other than Ugx 6000 as the insurance deduction for a particular month.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into the amount which was deducted and the date when it happened.
- Find out from the Portal and confirm whether it was a wrong amount as he claims clearly noting the reason on the Transaction section of the portal.
- Slack the issue in the Financial services channel.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue in the SB Portal and check whether finance corrected the Transaction.
- Contact the SafeBoda and notify him that his issue has been worked on.
- Close the ticket in the CRM tool.

### **Wrong SB deducted**

This is when a SB who never signed up for insurance is deducted the insurance monthly premium of 6000.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe him into when the transaction took place.
- Slack the issue in the Financial services channel.

- Notify the SB that their issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

## **Level 2**

- Follow up the issue and find out whether the transaction was reversed.
- Contact the SB and notify them that their issue has been resolved.
- Close the ticket in the CRM tool.

## **-Savings**

### **Completed Savings Query**

This is when a SafeBoda inquires when his Savings is expiring and wants to redeem their savings money.

- Get the SB number of the SafeBoda.
- Check in the Savings sheet to verify when his/her savings period is expiring.
- Inform the SafeBoda that his savings will be sent as cashless to his account on a Monday.
- Create a ticket in the CRM tool and close it.

### **Not debited**

This is when a SafeBoda claims that he/she was not debited his weekly savings from his cashless balance.

- Get the SB number of the SafeBoda.
- Probe him into the amount he is supposed to be deducted on a weekly basis.
- Check in the Savings sheet and confirm whether he was not debited.
- Go to the SB Portal and find out his cashless balance by Sunday midnight and Monday morning before 9am.
- Inform the SB the reason as to why he was not debited was as a result of having a less amount on their app against what they signed up in the savings contract.
- Create a ticket in the CRM tool and close it.

### **Savings Balance Check**

This is when a SafeBoda wants to know how much he has accumulated as their savings.

- Get the SB number number of the SafeBoda.
- Probe the SafeBoda into when(just estimate of the period) they signed the savings contract.
- Enter his SB number into the Savings sheet and find out when their savings period is expiring.

- Inform the SafeBoda about the time left on their savings period and their current savings amount.
- Create a ticket in the CRM tool and close it.

### **Wrong Amount Deducted**

This is when a SafeBoda is deducted an amount which is different from what he had signed in his savings contract.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into the amount which was deducted and the date when it happened.
- Find out from the Portal and confirm whether it was a wrong amount as he claims clearly noting the reason on the Transaction section of the portal.
- Slack the issue in the Financial services channel.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue in the SB Portal and check whether finance corrected the Transaction.
- Contact the SafeBoda and notify him that his issue has been worked on.
- Close the ticket in the CRM tool.

### **-Gas**

#### **Double Deductions**

This is when a SafeBoda is deducted twice from his cashless balance as a repayment for gas.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB to find out when it happened.
- Confirm the deductions from the SB Portal.
- Slack the issue in the SB payments channel on slack.
- Notify the SB that his issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate to level 2.

#### **Level 2**

- Follow up the issue by checking the SB portal and Gas sheet.
- Confirm whether the transaction was corrected by Finance.
- Contact the SafeBoda and notify him that their transaction was corrected.
- Close the ticket from the CRM tool.

### **Gas balance check**

This is when a SafeBoda wants to know the remaining balance to clear on their gas loan.

- Get the SB number number of the SafeBoda.
- Probe the SafeBoda into when(just estimate of the period) they signed the savings contract.
- Enter his SB number into the Gas sheet and find out when how much balance they are left on their gas loan.
- Inform the SafeBoda about the time left on their Gas loan period.
- Create a ticket in the CRM tool and close it.

### **Incorrect Deduction**

This is when a SafeBoda is deducted an amount which does not correspond to what they are supposed to be deducted.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into the amount which was deducted and the date when it happened.
- Find out from the Portal and confirm whether it was a wrong amount as he claims clearly noting the reason on the Transaction section of the portal.
- Slack the issue in the Financial services channel.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue in the SB Portal and check whether finance corrected the Transaction.
- Contact the SafeBoda and notify him that his issue has been worked on.
- Close the ticket in the CRM tool.

### **Wrong SB Deducted**

This is when a SafeBoda who did not subscribe for Gas is deducted money towards the gas loan for a particular week.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe him into when the transaction took place.
- Slack the issue in the Financial services channel.
- Notify the SB that their issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.



### **Level 2**

- Follow up the issue and find out whether the transaction was reversed.
- Contact the SB and notify them that their issue has been resolved.
- Close the ticket in the CRM tool.

### **-Spare Parts**

#### **Double Deductions**

This is when a SafeBoda is deducted twice from his cashless balance as a repayment for Spare Parts.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB to find out when it happened.
- Confirm the deductions from the SB Portal.
- Slack the issue in the SB payments channel on slack.
- Notify the SB that his issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate to level 2.

#### **Level 2**

- Follow up the issue by checking the SB portal and Spare parts sheet.
- Confirm whether the transaction was corrected by Finance.
- Contact the SafeBoda and notify him that their transaction was corrected.
- Close the ticket from the CRM tool.

#### **Wrong Amount Deducted**

This is when a SafeBoda is deducted an amount which is different from what he had signed in his Spare parts contract.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into the amount which was deducted and the date when it happened.
- Find out from the Portal and confirm whether it was a wrong amount as he claims clearly noting the reason on the Transaction section of the portal.
- Slack the issue in the SB Payments channel.
- Create a ticket in the CRM tool and escalate it to level 2.

## **Level 2**

- Follow up the issue in the SB Portal and check whether finance corrected the Transaction.
- Contact the SafeBoda and notify him that his issue has been worked on.
- Close the ticket in the CRM tool.

## **Wrong SB Deducted**

This is when a SafeBoda who did not subscribe for Spare Parts is deducted money towards the Spare parts loan for a particular week.

### **Level 1**

- Get the SB number of the SafeBoda.
- Probe him into when the transaction took place.
- Slack the issue in the SB Payments channel.
- Notify the SB that their issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

### **Level 2**

- Follow up the issue and find out whether the transaction was reversed.
- Contact the SB and notify them that their issue has been resolved.
- Close the ticket in the CRM tool.

## **-Watu Bike Loan**

### **Failed to Send Weekly Payment**

This happens when a SafeBoda who subscribed for WATU bike did not send his weekly repayment for WATU bike.

- Get the SB number of the SafeBoda.
- Probe him into why he was not able to send the weekly payment.
- Inform the SB that he will be required to also compensate for the previous week when he is making a payment for the following week.
- Create a ticket in the CRM tool and close it.

### **How to Join**

This is when a SafeBoda is inquiring what it takes to get a WATU bike.

- Get the SB number of that particular SafeBoda.

- Inform the SB that he is required to have taken 500 trips in the previous 3 months, no sanction from the performance office in the previous one month and his loan balance on the app should be at 0.
- Create a ticket in the CRM tool and close it.

### **Transferred to Excess Amount**

This is when a SafeBoda has transferred more than he is supposed to transfer on a particular week for the WATU bike.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe him into when he made the transfer.
- Check the SB portal and confirm the transfer.
- Slack the issue in the Financial services channel on slack.
- Notify the SB that his issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue with the Financial services team lead (Ian) and see if it was resolved.
- Contact the SB to notify him or her about how the issue was resolved.
- Close the ticket in the CRM.

### **-Solar**

#### **Wrong account Debited**

This is when a SafeBoda who has never subscribed for Village power has been debited.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe him into when the transaction took place.
- Slack the issue in the Financial services channel.
- Notify the SB that their issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue and find out whether the transaction was reversed.
- Contact the SB and notify them that their issue has been resolved.
- Close the ticket in the CRM tool.

#### **Wrong Amount Debited**

This is when an amount which is contrary to what he has to pay every week has been taken off the account of a particular SafeBoda who subscribed for Village power.

#### **Level 1**

- Get the SB number of the SafeBoda.
- Probe the SB into the amount which was deducted and the date when it happened.
- Find out from the Portal and confirm whether it was a wrong amount as he claims clearly noting the reason on the Transaction section of the portal.
- Slack the issue in the SB Payments channel.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue in the SB Portal and check whether finance corrected the Transaction.
- Contact the SafeBoda and notify him that his issue has been worked on.
- Close the ticket in the CRM tool.

#### **-Airtime**

##### **Purchased for a wrong number**

This happens when a SafeBoda/Customer has purchased airtime to a number which he was not meant to send to.

- Get the SB number of the SafeBoda. In case it's a customer, confirm with them the number the number they registered on the App.
- Check on the SB Portal to confirm the number to which they sent the airtime.
- Apologize to the SafeBoda or customer for that mistake but advise them that Airtime transfers cannot be reversed.
- Create a ticket in the CRM tool and close it.

##### **How it works**

This is when a SafeBoda wants to know how the airtime feature is used and when airtime reflects on his/her app.

- Get the SB number of the SafeBoda
- Explain to them how the airtime feature works on the SB App.
- Create a ticket in the CRM tool and close it.

##### **Wants UTL airtime**

- Get the SB number of the SafeBoda or customer.

- Inform them that they cannot buy UTL airtime via the App, however, inform them about the different types of airtime they can purchase through the app that is Airtel, MTN,Africell.
- Create a ticket in the CRM tool and close it.

### **Airtime not reflecting**

This is when a SafeBoda or customer has purchased airtime from the app and their cashless is deducted but the airtime does not reflect on their mobile number.

#### **Level 1**

- Get the SB number and phone number of the SafeBoda.
- Sympathize with the SafeBoda or customer about the issue.
- Probe him into when he made the purchase.
- Slack the issue in the Product channel.
- Inform the SB that his issue will be resolved within 24 hours.
- Create a ticket in the CRM tool and escalate it to level 2.

#### **Level 2**

- Follow up the issue and see if it was rectified by Product.
- Contact the SB or customer and notify them that their issue has been resolved.
- Create a ticket in the CRM tool and close it.

## **FOOD TICKETS (Reactive)**

### **Scenario 1**

Restaurant - out of stock item after order confirmation

#### **Owner**

Reactive

#### **How to Identify**

Incoming Call from the Restaurant

#### **How to resolve**

- 1.Inform Vendor that the person who placed the order will call them back
- 2.. Create a ticket & record Vendor name & escalate to Placing team using Agent Number that confirmed the order

#### **Escalate to**

YES TO PLACING

#### **How to track in SugarCRM**

Ticket type: SB Food Vendor

Category: Food

Subcategory: Out of stock

### **Scenario 2**

Customer wants to cancel after order has been placed

#### **Owner**

Reactive

#### **How to Identify**

Incoming Call from Customer

#### **How to resolve**

1. Inform Customer that you will process the cancellation but that they will still be charged because the order is already being prepared
2. Cancel the Order in the Portal with the correct reason code
3. Escalate ticket to Proactive who will call restaurant and process payment

#### **Escalate**

YES TO PROACTIVE

#### **How to track in Sugarcrm**

Ticket Type : SB Food Customer

Ticket Category : Cancellation

Ticket Sub category: Request

### **Scenario 3**

Street food vendor - out of stock item

#### **How to Identify**

Incoming Call from the SB

#### **How to resolve**

1. Confirm whether SB has checked all vendors on that road with similar items.
2. If there is no other vendor, create a ticket & record SB Number or Phone number
3. Escalate to Placing team using Agent Number that confirmed the order

#### **Escalate**

YES TO PLACING

#### **How to track in SugarCRM**

Ticket type: SB Food SafeBoda

Category: Vendor

Subcategory: No vendors available(street food)

### **Scenario 4**

SafeBoda starts trip and ends it without going to the restaurant to pick up the meal - for cash vendors (high and low value orders)

**How to Identify**

Incoming Call from Customer

**How to resolve**

- App shows that the order has been delivered - check this in the Order History
- Check payment type
- Support agent apologizes to the cust for the poor experience.
- Inform the customer that that particular order cannot be delivered due to the Sbs behavior.
- Ask the customer to re-order
- If the customer is cashless, assure them of their 100% refund.
- Record the SB number in the CRM tool and escalate to proactive team who will do a refund

**Escalate**

YES TO PROACTIVE

**How to track in SugarCRM**

Ticket Type : SB Food Customer

Ticket Category :Delivery Experience

Ticket Sub category :Start /stop

**Scenario 5**

SafeBoda starts trip and ends it after pickup of food and does not deliver to customer for cash or cashless vendors (high and low value orders)

**How to Identify**

Incoming Call from Customer

**How to resolve**

- App shows that the order has been delivered - check this in the Order History
- Check payment type
- Support agent apologizes for the poor experience and asks to call back the customer after finding out from the SB
- Call SB to find out why he did not deliver.If he has no justifiable reason
- Inform the customer of the 100% refund and ask the customer to reorder.
- Record the SB and escalate to the performance team.
- Escalate the ticket to the proactive team and the team Debits the SBs account.

**Escalate**

YES TO PROACTIVE

**How to track in SugarCRM**

Ticket Type :SB Food Customer

Ticket Category :Delivery Experience

Ticket Sub category :Food not delivered

## **Scenario 6**

SafeBoda starts trip and ends it after pickup of food and does not deliver to customer for cash or cashless vendors (high and low value orders)

### **How to Identify**

Incoming Call from Customer

### **How to resolve**

- App shows that the order has been delivered - check this in the Order History
- Check payment type
- Support agent apologizes for the poor experience and asks to call back the customer after finding out from the SB
- Call SB to find out why he did not deliver.If he has no justifiable reason
- Inform the customer of the 100% refund and ask the customer to reorder.
- Record the SB and escalate to the performance team.
- Escalate the ticket to the proactive team and the team Debits the SBs account.

### **Escalate**

YES TO PROACTIVE

### **How to track in SugarCRM**

Ticket Type :SB Food Customer

Ticket Category :Delivery Experience

Ticket Sub category :Food not delivered

## **Scenario 7**

SB cannot locate customer

### **How to Identify**

1. INCOMING CALL from SB 2. INCOMING CALL from Customer

### **How to resolve**

1. Open order and look at the map, direct SB. If directions are unclear, call the customer for clarification & call and direct the SafeBoda
2. Open order and look at the map, confirm directions from the customer. Call and direct SB to customer. If directions are unclear, send reason with clear directions in CRM

### **Escalate**

NO

### **How to track in SugarCRM**

Ticket Type :SB food Safeboda

Ticket Category :Navigation to customer

Ticket Sub category :Unclear delivery directions(Dependant on the reason)



## **Scenario 8**

SB cannot reach Customer

### **How to Identify**

INCOMING CALL from SB

### **How to resolve**

- Inform the SB to wait for 5 mins as we reach out to the customer.
- Call the cust(if not picking,)send an sms via Suga Crm to inform the cust that the Sb is trying to reach em for delivery
- If the customer does not respond within 5 mins.
- If the SB has the Food, tell him to come to HQ to meet the proactive team . He should end trip when he reaches HQ
- send an SMS informing the customer that the food delivery has failed bse of failure to communicate and the food was taken to the office. Advise them to call back after seeing the msg.
- Track the ticket in the CRM too

- Escalate issue to the proactive team

### **Escalate**

YES TO PROACTIVE IF CUSTOMER DOES NOT RESPOND IN 5 MINS

### **How to track in SugarCRM**

Ticket Type :SB food Safeboda

Ticket Category :Customer

Ticket Sub category :Customer not picking

## **Scenario 9**

Customer refuses to pay (Fraud)

### **Owner**

Reactive

### **How to Identify**

INCOMING CALL from SB

### **How to resolve**

- check payment type
- Call customer, if the customer does not answer, send an SMS via sugar, saying we are going to debit the order amount from their cashless balance.
- If SB has the food, then tell them to bring it to HQ and find the Proactive Support Team.
- IF SB doesn't have the food - tell them we cannot support them (??)

ESCALATE TO PROACTIVE ( below steps for them)

- Cancel order with correct reason listed.
- Manually ensure that the SafeBoda has been paid
- Reach out to customer again, if customer is unreachable in 48 hours, deactivate customer

**Who to escalate**

YES

**How to track in SugarCRM**

Ticket type: SB Food SafeBoda

Category:

Subcategory: Customer refuses to pay(Fraud)

**Scenario 10**

Customer refuses to pay due to restaurant or our own error - receives wrong food ( Cash Vendor)

**Owner**

Reactive

**How to Identify**

1. INCOMING CALL from SB
2. INCOMING CALL from Customer

**How to resolve**

- Understand what the error is.
- Confirm that it's not the Customer error
- Confirm vendor payment type
- Offer 100% refund and tell customers they can re-order.
- Tell the SB to bring the Food to HQ.
- Escalate to Proactive for resolution

ESCALATE TO PROACTIVE (below steps for them)

- Call and inform the restaurant about the error & requested refund.

**Who to escalate**

YES

**How to track in SugarCRM**

Ticket type: SB Food

Category:Vendor error

Subcategory: Customer refuses to pay (Cash VENDOR)

### **Scenario 11**

Customer refuses to pay due to restaurant or our own error - receives wrong food  
(Cashless vendor)

#### **Owner**

Reactive

#### **How to Identify**

1. INCOMING CALL from SB
2. INCOMING CALL from Customer

How to resolve

- Understand what the error is.
- Confirm not a customer error by checking what was ordered
- Confirm vendor payment type
- Offer 100% refund and tell the customer they can re-order.
- Tell the SB to bring the Food to HQ.
- Escalate to Proactive for resolution

ESCALATE TO PROACTIVE (below steps for them)

- Call and inform the restaurant about the error & requested refund.

#### **Who to escalate**

YES to Proactive

#### **How to track in SugarCRM**

Ticket Type :Sb food Customer

Ticket Category :Food quality

Ticket Sub category :wrong orders

### **Scenario 12**

Customer refuses to pay due to missing items

#### **Owner**

Reactive

#### **How to Identify**

1. INCOMING CALL from Customer

How to resolve

- Understand what the error is.
- Confirm not a customer error by checking what was ordered
- Offer customer refund for their missing item
- Tell them they can place an order for that item again through the app if they must have that item, and we will waive the delivery fee.

ESCALATE TO PROACTIVE (below steps for them)

-Process Refund

**Who to escalate**

YES to the Proactive team.

**How to track in SugarCRM**

Ticket Type :Sb food Customer

Ticket Category :Food quality

Ticket Sub category :Missing Item

**Scenario 13**

Crisis-system/APP failure- Customer unable to place an order/track progress/ track SB on the map(after dispatch)

**Owner**

Reactive + Proactive

**How to Identify**

1. INCOMING CALL from customer
2. Update from Product team

**How to resolve**

REACTIVE

-Call & Apologise to customer & Record and escalate the issue to Product

-call back the customer with the right feedback and resolution -from the product team with a timeline if it can not be fixed immediately(say restart app after 15 munutes)

PROACTIVE

-Call customers to apologise & inform them of the crisis/failure. Inform them that it is being worked on and will be resolved within x mins.

-Record and escalate the issue to the right documentation ,

-call back the customer with the right feedback and resolution -from the product team with a timeline if it can not be fixed immediately(say restart app after 15 munutes)

**Who to escalate**

YES to Proactive

**How to track in SugarCRM**

Ticket Type :Sb food customer

Ticket Category :Delivery experience

Ticket Sub category :App issues

**Scenario 14**

SafeBoda gets a zero trip after ending the trip

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- L1: Apologize to the SafeBoda and promise them refund
- L1: Escalate to L2
- L2: call customer to request for a deduction off their account
- L2: credit SafeBoda **for cashless customer &** For Cash, call customer and confirm how much was paid. and top up balance if required

**Who to escalate**

YES TO LEVEL TWO

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category :Payments

Ticket Sub category :Zero trip

**Scenario 15**

SafeBoda is not satisfied with the food delivery trip cost/price after ending trip

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- L1: Apologize to the SafeBoda and promise them refund
- L1: Escalate to L2
- L2: Calculate undercharge and credit

**Who to escalate**

YES TO LEVEL TWO

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category :Payments

Ticket Sub category :Unfair distance Under charge

**Scenario 16**

Customer forgot to switch to cashless and customer has not paid the SafeBoda cash

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- L1: Apologize to the SafeBoda and promise them refund
- L1: Escalate to L2
- L2: call customer to request for a deduction off their account for the Food order that was not paid
- L2: credit SafeBoda for cashless customer & For Cash, call customer and confirm how much was paid. and top up balance if required

**Who to escalate**

YES TO PROACTIVE

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category :Payments

Ticket Sub category :Unpaid Order

**Scenario 17**

SafeBoda is unable to start/end food trip

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- Request for details of the SafeBoda and end trip on the portal.
- If he can't start the trip, explain to the SafeBoda how to troubleshoot.

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category :Product

Ticket Sub category :App Issues

**Scenario 18**

SafeBoda forgot to start food trip and realised after reaching destination for cashless customers

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- L1: Apologize to the SafeBoda and promise them refund
- L1: Escalate to L2
- L2: credit SafeBoda for cashless customer delivery fee and debit from Customers Account

**Who to escalate**

YES TO LEVEL TWO

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category : Driver Error

Ticket Sub category :Forgot to start trip

**Scenario 19**

SafeBoda needs to know about food

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

Explain to him how it works and all the processes he needs to go through while taking a food trip plus the added incentives for a food trip

**Who to escalate**

NO

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category : Inquiries

Ticket Sub category :Education/Feedback

**Scenario 20**

SafeBoda delays or can not deliver the food because of the bad weather(heavy rain)

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- Tell the SafeBoda to wait for the rain to reduce and proceed to deliver
- Call the customer and request them to be patient since the SafeBoda has been affected by weather(rain) but he is on the way delivering the food.

ESCALATE TO PROACTIVE

-Also keep in touch with them both to confirm that the delivery has been successful

Who to escalate

YES TO PROACTIVE

**How to track in SugarCRM**

Ticket Type : SB Food SafeBoda

Ticket Category : Delivery Experience

Ticket Sub category :Bad weather - delay

**Scenario 21**

SafeBoda doesn't understand why his balance was made negative after doing a Food Order.

**Owner**

Reactive

**How to Identify**

Incoming Call from SafeBoda

**How to resolve**

- 1 . Check order type - this should only happen if the VENDOR is CASHLESS and the Customer is CASH
2. Explain that they have been debited because they collected the cash from the customer for the price of the food. Because they know have the cash, the equivalent amount in cashless is being debited from their account to pay the restaurant
3. Create Ticket

Who to escalate



## **# Ticket type 4:SEND**

### **Categories**

Customer App Issues  
Customer General Issues  
Customer Rider Quality Issues  
SB App Issues  
SB Equipment Issues

### **-Customer App**

Stuck on trip  
Zero Trips  
Infinite search (slow network)  
Cannot select location/ Google Maps  
Wrong Estimate  
Trip Overcharge  
Missing Cashless  
Failure to request  
Failure to Pair

### **-Customer General Issues**

Accident  
Questions and inquiries  
Offline send request  
Want to do several trips  
App Education  
Mpesa Refund Request  
Negative feedback about the service  
Positive feedback about the service  
Customer Receipt request

### **-Customer Rider Quality Issues**

SB Delayed delivery  
SB refusing to carry the package  
SB Arrested  
Bike Breakdown  
SB with package and manual trip  
SB not having carrier bag

Failed to deliver  
Rider cancelling the trip  
Not calling/ Cannot be reached  
Too slow/Long Route/map issues  
Package spoilt/broken  
Not showing up  
Late trip ends  
Early trip starts.

### **-SB App Issues**

Unable to start/end trip  
Trip Undercharge  
App crashing/ Misbehaving

### **Zero Trips**

-SB Equipment Issues  
Broken/ Spoilt Bike  
Request for a carrier bag

### **-SB General Issues**

Accidents  
Forgot to start trip  
App Education  
App Update  
How to add stop  
What kind of carrier should i have  
Suggestions  
How to do return trip  
How much did the trip cost

### **-SB Customer Issues**

Cancelling trip on arrival  
Client not showing up  
Client refusing to go pick package  
Extra payments/Parking fee  
Client refusing to order return trip  
Client unable to order for return  
Clients package is too big  
Clients giving illegal goods.

## **SB Customer Issues**

### **Cancelling trip on arrival**

- Request for the SB number/Confirm if its the current trip on his app
- Apologise for the inconveniences, inform the SB the customer will be talked to about that
- Track the issue and Close it

### **Client not showing up**

- Request for the SB number/Confirm if its the current trip on his app
- Inform the SB you are to Try reaching the Customer then get back to him,If the customer unreachable apologise to the SB and Advise the SB to bring the package to HQ
- If the customer is reachable inform the Customer that the SB to deliver his/her package has arrived at the drop off and request the customer to call the SB
- Create a ticket and close it if the customer was able to get in touch with the SB and follow up incase the customer was not reachable by then later inform the customer to come pick the package at HQ and close the Ticket

### **Client refusing to go pick package**

- Request for the SB number/Confirm if its the current trip on his app
- Inform the SB you are to Try reaching the Customer then get back to him,If the customer Deliberately refuses to go pick the package inform the customer that the package will be taken to the HQ in case He/she makes up his/her mind.
- Apologise to the SB and request him to bring the package to HQ
- Create a ticket and close it

### **Clients giving illegal goods.**

- Request for the SB number/Confirm if its the current trip on his app
- Probe about the details of the package
- If illegal, enlight the customer about the acceptable goods to be transported via app
- Create a ticket and close it

### **Client refusing to order return trip**

- Request for the SB number/Confirm if its the current trip on his app
- Probe about the situation
- if it's a misunderstanding,Inform the SB to end trip and tell the customer to order again

- If the customer deliberately refuses, Inform the customer that the trip will be ended and he/she would make use of another alternative
- Create a ticket and close it

#### **Clients package is too big**

- Request for the SB number/Confirm if its the current trip on his app
- Probe the customer about the details of the package(Size and weight)
- Enlighten the customer about the Standard weight/size(<15kgs) for packages to be sent
- Create a ticket and close it

#### **Client unable to order for return**

- Request for the SB number/Customer number registered on the app
- Probe about the situation, If it's an app issue,take the customer through the troubleshoots
- If the customer has no access to his/her phone inform the customer that the trip will be ended and he/she would try other alternatives
- Create a ticket and close it

#### **Extra payments/Parking fee**

- Request for the SB number/Confirm its the current trip running on app
- Probe about the situation
- Inform the customer that other charges incurred in delivering the package are not met by the SafeBoda but the customer
- Create a ticket and close it

#### **SB General Issues**

- Accidents
- Request for the SB number
- Probe the SB About the Incident
- Apologize to the SB,
- Create a ticket with detailed information about the incident and escalate it to Performance team(Karim Etima)

#### **Forgot to start trip**

- Request for the SB number
- Caution the SB about starting trips and ending trips in time
- Talk to the customer and inform him/her about the Situation and find a solution on how the payment would be made
- Create a ticket and close it.

- App Education
- Request for the SB number
- Probe the SB about the hardships he is facing while using the app
- Enlight the SB about how to use the application best in that particular regard
- Create a ticket and close it

### **App Update**

- Request for the SB number
- Take the SB through the Steps he can follow to update his app
- If he fails to understand Anything, advise him to seek help from a fellow SB or to come to Office
- Create a ticket and close it

### **How to add stop**

- Request for the SB number
- Take the SB through the Steps he can follow to add a stop
- If he fails to understand advise him to seek help from a fellow SB or to come to Office
- Create a ticket and close it

### **What kind of carrier should i have**

- Request for the SB number
- Enlight the SB to atleast have rope for packages that need to be tied on the bike(Packages that may inconvenience riding)
- Create a ticket and close it

### **Suggestions**

- Request for the SB number
- Listen and take note of what the SB has to say
- Inform the SB that his idea would be forwarded further
- Create a ticket and Close it

### **How to do return trip**

- Request for the SB number
- Take the SB through the process of making a return trip
- Create a ticket and close it

### **How much did the trip cost**

- Request for the SB number/Confirm the trip
- Check in the portal and share the trip cost with the SB

- If the SB is just ignorant about the App,teach him how to or advise him to come for app training at office
- Create a ticket a close it

### **SB App Issues**

- Unable to start/end trip
- Request for the SB number
- Take the SB through the troubleshoots
- Create a ticket and close it
- **Trip Undercharge**  
Request for the SB number
- Confirm the trip details
- If it's an application error, apologise create a ticket and escalate it to level 2.
- (LEVEL 2: Determine the actual trip cost and make necessary account adjustments and close the ticket)
- If it's not an app error, Enlight the SB about the Send trips pricing
- Create a ticket and close it

### **App crashing/ Misbehaving**

- Request for the SB number
- Probe the SB about what he is experiencing while using the App
- Take necessary troubleshoots, if it fails notify Product team about the Issue
- If issue is fixed in real time inform the SB about the Fix
- Create a ticket and close

### **Zero Trips**

- Request for the SB number
- Confirm the trip details,
- If its an app error apologize, Create a ticket and escalate it to level 2.
- (LEVEL 2: Determine the actual trip cost and make necessary account adjustments and close the ticket)

### **SB Equipment Issues**

- Request for the SB number
- Find out more about the Equipments and their current shape
- Advise the SB to come to office
- Create a ticket and Escalate it to performance

**Broken/ Spoilt Bike**

- Request for the SB number
- Probe the SB about the current shape of his Bike
- Find out if the SB can repair the Bike in time and continue with the Journey,
- If possible Call and inform the customer about a delay in the delivery
- If impossible advise the SB to end the trip,request the customer to order again, promise a refund create a ticket and escalate it to Level 2
- (Level 2: make the necessary financial adjustments on the Accounts and close the ticket)

**Request for a carrier bag**

- Request for the SB number
- Enlight the SB to atleast have rope for packages that need to be tied on the bike(Packages that may inconvenience riding)
- Create a ticket and close it

**Customer App**

- Stuck on trip
- Request for the customer number used on the application
- Probe the SB about what he is experiencing while using the App
- Take necessary troubleshoots, if it fails notify Product team about the Issue
- If issue is fixed in real time inform the customer about the Fix
- Create a ticket and close

**Zero Trips**

- Request for the customer number used on the application
- Confirm the trip details,
- If its an app error apologize, Create a ticket and escalate it to level 2.
- (LEVEL 2: Determine the actual trip cost and make necessary account adjustments and close the ticket)

**Infinite search (slow network)**

- Request for the customer number used on the application
- Probe about what he is experiencing while using the App
- Take necessary troubleshoots, if it fails notify Product team about the Issue

- If issue is fixed in real time inform the customer about the Fix
- Create a ticket and close

### **Cannot select location/ Google Maps**

- Request for the customer number used on the application
- Probe about the experience
- Take the customer through necessary troubleshoots, if it fails notify Product team about the Issue
- If issue is fixed in real time inform the customer about the Fix
- Create a ticket and close

### **Wrong Estimate**

- Request for the customer number used on the application
- Probe about the experience
- Take the customer through necessary troubleshoots, if it fails notify Product team about the Issue
- If issue is fixed in real time inform the customer about the Fix
- Create a ticket and close

### **Trip Overcharge**

- Request for the customer number used on the application
- Confirm the trip details
- If it's an application error, apologise create a ticket and escalate it to level 2.
- (LEVEL 2: Determine the actual trip cost and make necessary account adjustments and close the ticket)
- If it's not an app error, Enlight the customer about the Send trips pricing
- Create a ticket and close it

### **Missing Cashless**

- Request for the customer number used on the application
- Confirm the trip details
- If it's an application error, apologise create a ticket and escalate it to level 2 and inform the Product team



**Failure to request**

- Request for the customer number used on the application
- Probe about the experience
- Take the customer through necessary troubleshoots, if it fails notify Product team about the Issue
- If issue is fixed in real time inform the customer about the Fix
- Create a ticket and close

**Failure to Pair**

- Request for the customer number used on the application
- Probe about the experience
- Take the customer through necessary troubleshoots, if it fails notify Product team about the Issue
- If issue is fixed in real time inform the customer about the Fix
- Create a ticket and close

**Customer General Issues****Accidents**

- Request for the Customer number used on the application
- Probe the SB About the Incident
- Apologize to the Customer, Create a ticket with detailed information about the incident and escalate it to Performance team(Karim Etima)
- If the package was not yet delivered, inform the customer to re-request again

**Questions and inquiries**

- Request for the Customer number used on the application
- Listen and take note of what the customer is inquiring about
- Enlight the customer about the necessary information in that regard
- Create a ticket and Close it

**Offline send request**

- Request for the Customer number used on the application
- Enlight the customer about the disadvantages of using an offline send trip and advise her to use a trip on app for security purposes

- Create a ticket and close it

### **Want to do several trips**

- Request for the customer number used on the application
- Inform the customer about the current App not to be able to support several trips at once
- advise the customer to order for every destination where the packages are to be delivered
- create a ticket and close it

### **App Education**

- Request for the customer number used on the application
- Find Out what the customer would like to do on the app
- Enlighten the customer about how to use the application best in that particular regard
- Create a ticket and close it

### **Negative feedback about the service**

- Request for the customer number used on the application
- Probe about the experience the customer had while using the service
- Apologize and promise something would be done to improve the Service
- Create a ticket and escalate it if needed or close it

### **Positive feedback about the service**

- Request for the customer number used on the application
- Listen to the customer's story
- Appreciate the feedback
- Create a ticket and close it

### **Customer Receipt request**

- Request for the customer number used on the application
- Inform the customer to use her trip history as a record for her taken trips and the company is unable to process receipts
- Create a ticket and close it

## **Customer Rider Quality Issues**

### **SB Delayed delivery**

- Request for the customer number used on the application
- Confirm the trip details
- Call the SB and find out about the delay
- Call the customer back apologise and inform her about the SB's location and request for a little patience as the SB delivers the package
- Create as ticket and close it