

CAE
job aid

2014 ASC-X1 Scorecard KPI's

METRIC	BUSINESS IMPACT	DESCRIPTION	CALCULATION	WEIGHT
Pinnacle	Provides high-quality standards to improve the Customer Experience that will drive improvements in overall customer satisfaction.	Meet the monthly expectations for Pinnacle. Pinnacle is the quality assurance program that defines how we deliver a high-quality, consistent experience for every customer. Specific achievement ranges for this goal will be communicated via site leadership.	All Pinnacle evaluations completed by your Supervisor are compiled to produce a monthly Pinnacle score. Sum of all Pinnacle Scores ÷ the # of Evaluations Completed.	<u>Weighting: 27%</u> EX: ≥75.6 HE: 73.1 – 75.5 AE: 64.5 – 73.0 NI: 61.0 – 64.4 UN: ≤ 60.9
FCR	Provides our customers with a superior experience. It is critical that we meet and exceed their expectations the first time, every time so that there is no need for them to call back about the same issue.	Meet the monthly expectations for agent FCR. Agent FCR is an indicator of how many customers have their issue addressed or resolved during the first call to Comcast. Specific achievement ranges for this goal will be communicated via site leadership.	Number of unique callers, by call type handled by the CAE that called once in a 7-day rolling period ÷ Total number of unique callers handled by the CAE in the same period.	<u>Weighting: 27%</u> EX: ≥ 83.6 HE: 80.5 – 83.5 AE: 77.3 – 80.4 NI: 74.8 – 77.2 UN: ≤ 74.7
TSR	Educating our customers about their products and services is how we provide World-Class Service to help them find more value, choice and convenience with Comcast.	Meet the monthly expectations for TSR. TSR provides an indication of how often we upgrade our current customers who call into our non-Sales queues with new lines of business (RGU's). Specific achievement ranges for this goal will be communicated via site leadership.	Completed RGUs upgrades ÷ total # of calls handled (RGU upgrade = Addition of Basic Video, HSD or CDV)	<u>Weighting: 18%</u> EX: ≥ 2.11 HE: 1.22 – 2.10 AE: 0.51 – 1.21 NI: 0.15 – 0.50 UN: ≤ 0.14
LOQ% / ITG	Completing the appropriate LOQ/ITG on each and every interaction promotes FCR and enables us to correlate technical issues and outages.	Meet the monthly expectations for LOQ and/or ITG usage. LOQ/ITG compliance is a measure of how often an LOQ/ITG is completed compared to the number of calls handled. Specific achievement ranges for this goal will be communicated via site leadership.	Completed LOQ/ITG's ÷ total # of account loads	<u>Weighting: 9%</u> EX: ≥ 80.0 HE: 75.0 – 79.9 AE: 70.0 – 74.9 NI: 65.0 – 69.9 UN: ≤ 64.9
AHT AHT ranges adjusted for X1	When you optimize your time on the phone with customers, their experience with us is as convenient and efficient as possible. Maintaining good productivity also promotes positive Service Levels.	Meet the monthly expectations for AHT. AHT is the sum of Talk Time, Hold & After Call work (ACW) divided by total calls handled at the Agent level. Specific achievement ranges for this goal will be communicated via site leadership.	Total Talk, Hold & After Call work (ACW) ÷ total # of calls handled Note: AHT will be a blended a blended calculation for X1 and non X1 call types.	<u>Weighting: 9%</u> EX: ≤ 427 HE: 428 – 483 AE: 484 – 605 NI: 606 – 672 UN: ≥ 673
Product Knowledge	By ensuring our employees understand and can articulate the features and benefits of our products, we gain a significant competitive advantage.	Our 2014 Division Goal is for every Northeast Division employee to increase their awareness and understanding of our products and services in order to gain confidence in their ability to describe and sell them to customers.	Complete one Comcast University eLearning Product Module each quarter. A specific product module will be uploaded automatically in your Learning Portal at the start of each quarter.	<u>Weighting: 10%</u>

4/16/2014

Keystone Care Operations
Goals and Incentive Plans are Subject to Change as Business Needs Dictate



S1 - Start

- ☐ **GREET the Customer Clearly:** What's Key/Example: "Thank you for calling Comcast. This is [_____]. How can I help you today?" in an unrushed pace
- ☐ **REFLECT NEED/RELATE or EMPATHIZE/ TAKE OWNERSHIP:** Be specific, acknowledge circumstance or stated feelings, use **positive** active words that indicate ownership
- ☐ **SET AGENDA/AUTHENTICATE/PLANT SEED:** Ask permission to ask questions, who are you speaking with? Last 4 of SSN, account number only as LAST resort, use statement which reflects intent to solve issue and then do an account review

S2 - Solve

- ☐ **OBTAIN INFORMATION/PROBE PROBLEM:** Ask effective open and close ended questions, engage customer and make it effortless, uncover underlying issues or opportunities
- ☐ **RESOLVE/ADDRESS ISSUE:** Explain basics of why problem occurred, relevant detail beyond what was necessary, future prevention use tools (LOQs, etc.)
- ☐ **BUILD VALUE/ENHANCE:** Share feature(s) and benefit(s) of at least one of customer's current product(s) or service(s), tailored, relevant to needs or educate on self-service or other Comcast value adds as applicable to the conversation

S3 - Sell

- ☐ **TRANSITION TO RELEVANT OFFER:** Transition after initial inquiry satisfied, use bridging statements to transition into discussion of products & services, tie back the customer needs, current services
- ☐ **PRESENT OFFER:** Present as expert, share benefit(s) of product / service by reflecting back a couple of uncovered needs/**BRAG** about your likes of the services, too
- ☐ **OVERCOME OBJECTIONS:** Acknowledge the concern and attempt to address concern referencing back to uncovered needs
- ☐ **PROACTIVELY CLOSE SALE:** Ask for the sale using any technique (choice close, assumptive close, urgency close)

S4 - Summarize

- ☐ **SUMMARIZE:** Provide customer with what he/she can expect next; remember COS as applicable. If no next steps, **briefly** recap actions
- ☐ **CLOSE CONTACT:** Offer additional assistance, demonstrate appreciation, **PERSONALIZE**
- ☐ **DOCUMENTATION:** (1) Who called (first and last name) (2) Reason for Call (3) Issue Resolution / Actions Taken (4) Pertinent information that will help next agent

Behaviors

- ☐ Tone, Confidence, Clarity (unrushed pace)
- ☐ Active Listening (verbal nods, avoid interrupting)
- ☒ Contact Management (holds/dead air, check back)
- ☐ Take Responsibility (what I can do, avoid negatives)
- ☐ Build Rapport / Relate / Concern (genuine responses to customer)
- ☐ Clues and Cues (sales opportunity)



Comcast Quality Guidelines



Comcast Cable Corporation

07/19/12

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CONVERSION/SALES

Conversion/Sales competency is the fifth of the eight main categories measured in our interactions. This section focuses on strength in positioning the appropriate products and services, whether it be additional services offered, responding to resistance, or keeping a customer from choosing another provider altogether.

Some of the key behaviors and actions to take are:

- Demonstrate awareness of existing products
- Build value within the offer of products and services
- Maintain confidence and role of expert in positioning the sale
- Respond appropriately to resistance
- Focus on strengths and benefits of services in attempts to save a customer from a disconnect

The following behaviors are included in the Conversion/Sales competency:

13. Offer Products/Services Tailored to Needs
14. Ask for the Sale
15. Respond to Resistance
16. Attempt to Save the Customer

Notes:

- Unless indicated, behaviors are rated at any point/throughout the call
- For an excellent or average rating, all bullets/criteria relevant to the call must be met (unless otherwise noted)

N/A: Refer to below matrix

Performance Criteria

Sample Verbiage

Excellent ☆☆☆☆

- ★ In discussing products/services, clearly discussed how they were related to the caller's needs
- ★ Mentioned multiple benefits/values of Comcast products/services which are tailored to the caller's expressed needs
- ★ Demonstrated an awareness and understanding of competitive products or services
- ★ Personalized the conversation with the caller to build rapport and ease the sale

- *For example: use effective "needs-based" selling*
- *For example: How wonderful that you just purchased a new high-definition TV! Based on what you mentioned before that you missed your favorite shows because of your schedule. If you add an HD/DVR service to your package, you will not miss your favorite shows; you will be able to view them and others in high definition. Take advantage of recording up to 2 of your favorite shows at the same time; be able to view these shows at your convenience, be able to pause live TV.*

Average ☆☆☆

- ★ Any products/services that were discussed were aligned with/related to the caller's needs in a general way
- ★ Identified the opportunity and transitioned to the sales conversation when appropriate
- ★ Mentioned at least one benefit or value of a Comcast product or service relevant to the conversation

- *For example: Based on what you mentioned before that you missed your favorite shows because of your schedule. If you add HD/DVR service to your package, you will no longer miss your favorite shows.*

Needs Improvement ☆☆

- ★ Selling the promotion rather than the value of the service(s)
- ★ Failed to mention retail value of services, prior to existing price
- ★ Neglected to mention any value of a product/service offered

- *Mr. /Mrs. _____ we have phone service available at \$19.99 for the next 12 months....*

Continued onto the next page

Unsatisfactory ☆

- ★ Recommended products/services that were not aligned with/related to the caller's needs, even in a general way
 - ★ Discussed purchasing additional Comcast products or services when the caller had specifically asked NOT to discuss
 - ★ Failed to pick up on an obvious cue from the caller that a Comcast product or service would not only be appropriate, but appreciated
 - ★ Failed to discuss products/services aligned with caller's needs
 - ★ Did not recommend products or services when it was appropriate to do so
- *For example:* Customer: I don't have your telephone service, but my neighbor does, and she loves it! Agent: I'm glad your neighbor likes it. Is there anything else I can help you with today?
 - *Example:* We should look to expand on the services the customer already has. Upgrade opportunities exist for 1 or 2 product customers. Add ons exist for 3 product customers.

NA is appropriate for Offer Products and Services in the following scenarios:

- Customer is irate/or doesn't seem happy with resolution
- Caller could not authenticate account
- Caller is notated on account as unable to make changes
- Upgrade hold on the account due to delinquency (DST markets)
- Customer in non-pay disco status
- Pending work order or DOJ
- Tech arrival / ETA /Where's My Tech (cannot add to account/ once tech is dispatched on open work order)
- Transfers / Escalations or immediate callbacks
- Scheduling TC for No Cable/No Internet/No Dial Tone/Outage, but agents can still offer SPP when applicable (no penalty for NOT selling SPP)
- Customer volunteers a "don't sell to me " statement

N/A: Customer specifically states/he wanted to purchase the product or service before the agent had a chance to close OR Customer specifically stated s/he did NOT want to purchase a/the product before agent had a chance to close.

Performance Criteria

Sample Verbiage

Excellent ☆☆☆☆

- ★ Directly asked the caller if s/he wished to purchase one or more products or services discussed

- *Would you like to purchase HD/DVR today?*

Average ☆☆☆

- ★ Indirectly asked for the sale

- *I could enter an order if you are interested.*

Needs Improvement ☆☆☆

- ★ Waited for the caller to indicate s/he wished to purchase one or more products or services discussed as solutions or
- ★ Pauses, or otherwise implies to caller that a pitch for a sale occurred.

- Customer: *Oh, I think that might work for me.... Um.... Can you go ahead and add that to my account?*

- Example of implied: Agent opens dialogue about products and services (per parameter 13) and pauses for customer response of acceptance or denial.

Unsatisfactory ☆

- ★ Did not ask caller if s/he wished to purchase any products or services during a contact in which products/services were discussed as solutions

N/A: If there was No attempt at making the sale, or
Customer accepts offer presented without resistance.

Performance Criteria

Sample Verbiage

Excellent ☆☆☆

- ★ Specifically tailored attempts to overcome caller resistance to the caller's stated needs
- ★ Responded to resistance by discussing an alternative, more appropriate solution(s) to the caller's need(s)

- *Well, our Comcast Customer Guarantee is our promise to you, as a customer, to provide you the best customer experience and stand behind our products and services. If for any reason within you are unhappy with our services we offer a 30 day money back guarantee. But I know you're going to love your new [Triple Play, Internet, etc – insert services here.]*
- *If the is not the right choice for you, I can offer you the which still gives you the As part of our Customer Guarantee we are constantly adding new movies, sports and TV shows, so I'm sure we can help you find a package that has everything you want.*

Average ☆☆☆

- ★ Made one or more attempts to overcome caller's resistance about purchasing product/service (e.g., by re-emphasizing benefits of service or product being offered)

- *Comcast stands by our services and guarantees that if for any reason you are unsatisfied you can cancel your service and receive a 30 day money back guarantee within the first 30 days. (Certain fees and PPVs are not refundable).*

Needs Improvement ☆☆☆

- ★ Made poor attempt to overcome caller's resistance about purchasing product/service
- ★ Provided a rebuttal with no value

- *Example: Are you sure you don't want to purchase this service? (without stating a benefit/rationale)*

Unsatisfactory ☆

- ★ Was overly-aggressive, re-attempting to sell after the caller clearly stated that s/he was uninterested in purchasing any products/services or expressed frustration over sales attempts
- ★ Made no attempt to respond to the caller's resistance
- ★ Argumentative, bantering with caller

- Overly Aggressive Example:
Agent: Are you sure you don't want to purchase "x"?
Customer: Don't try to sell me something else when is still not working."
Agent: I just think this package will suit your needs.
- Argumentative: *Customer: no, your competitor has a better rate. Agent: But Comcast has....*

ATTEMPT TO SAVE THE CUSTOMER 16

N/A: Customer did not indicate that s/he was considering canceling any part of product/service or;
the disconnect is uncontrollable (move to non-service area, etc)

Performance Criteria

Sample Verbiage

Excellent ☆☆☆

- ★ Made attempt(s) to save the customer, stating benefits of retaining service (without being overly aggressive)
- ★ Specifically linked attempt to save customer to customer's issues/reasons for wishing to cancel
- ★ In response to disparaging remarks about Comcast or favorable remarks about a competitor, emphasized Comcast's strengths and the value of the customer throughout the interaction

- Example: You've been a great customer for four years. We value your business. Here at Comcast we truly care about our customers, so let's see what we can do to keep you with us.
- keep your phone service
- the great video package you have today.
- Cancel- TR- Mr./Mrs., I'm sorry we weren't able to resolve your issue the first time we visited your home. As part of the CCG, we work hard to provide the best possible customer experience and resolve service issues on the first visit. We will send another Technician out to you, and if the problem is something that we missed the first time we were there, we will offer you a complimentary service for 3 months of your choice.

Average ☆☆☆

- ★ Made an attempt to save the customer, stating benefits of retaining service or other proposed alternative to cancellation
- ★ Responded at least once to disparaging remarks about Comcast or favorable remarks about a competitor by emphasizing Comcast's strengths

- Example: We value your business and would like to see you keep all the great Of your package. I know you will love keeping your (HBO, phone service)
- Example: Customer: Competitor "A" offers..... Agent: I understand, are you aware that Comcast offers the which is a great value....
- Example: As part of our Comcast Customer Guarantee, we promise that our Technicians will arrive at your home trained and equipped to complete the job in one visit.

Continued onto the next page

RATING FORM

Form

Customer	Working Period	+	Evaluation Type	Rule By Date	25	Form number	
Region		+	Customer Information Date		25	Avg First 4 Score	8%
Location		+	Coached on		25	Possible Points	7.5
Employee Name		+	Call ID#			Earned Points	6.7
ICCID#		+	Call Length (mins)			★★★★★☆☆☆☆	70%
Evaluation Date	5/8/2011		Primary/Secondary Call Reason	Strong	+		
Evaluated By	Robt. Rachal		Group				

Evaluation	Points	Rating	Yes	Comments	Points Earned	Possible Points	Score
Service Orientation (10%)							
Greeting	2.5	★★★★	<input type="radio"/>	add			
Demonstrate Courtesy	2.5	★★★★	<input type="radio"/>	add			
Authentication	2.5	★★★★	<input type="radio"/>	add			
Establish Rapport/Personalization	2.5	★★★★	<input type="radio"/>	add			
Identity Identification (10%)							
Listen Actively	5	★★★★	<input type="radio"/>	add			
Obtain Information	5	★★★★	<input type="radio"/>	add			
Contact Resolution (15%)							
Take Responsibility/Ownership	5	★★★★	<input type="radio"/>	add			
Provide Information	5	★★★★	<input type="radio"/>	add			
Summarize Action	5	★★★★	<input type="radio"/>	add			
Communication (10%)							
Project Professionalism	5	★★★★	<input type="radio"/>	add			
Obtain Confirmation	5	★★★★	<input type="radio"/>	add			
Communicate with Clarity	5	★★★★	<input type="radio"/>	add			
Conversion/Sales (20%)							
Offer Products/Services Tailored to Needs	5	★★★★	<input type="radio"/>	add			
Ask for the Sale	5	★★★★	<input type="radio"/>	add			
Respond to Objections	5	★★★★	<input type="radio"/>	add			
Attempt to Save the Customer	5	★★★★	<input type="radio"/>	add			
Contact Management (20%)							
Control Contact via Time Efficiency	5	★★★★	<input type="radio"/>	add			
Minimize Personal Time	5	★★★★	<input type="radio"/>	add			
Extend Hold Courtesy	5	★★★★	<input type="radio"/>	add			
Use Proper Transfer Technique	5	★★★★	<input type="radio"/>	add			
Conclusion (5%)							
Offer Additional Assistance	2.5	★★★★	<input type="radio"/>	add			
Closing	2.5	★★★★	<input type="radio"/>	add			
Breakthrough Forces (5%)							
Recommendation	2.5	★★★★	<input type="radio"/>	add			
Follow-up	2.5	★★★★	<input type="radio"/>	add			
Auto Fall (10%)							
Auto Fall	5	★★★★	<input type="radio"/>	add			

Coaching Questions

Agent Inputting

- Did the agent comply with the current Customer Satisfaction requirements? ☐ Yes ☐ No
- Could the manager generate a script call? ☐ Yes ☐ No
- Was there a missed sales opportunity? ☐ Yes ☐ No

General

- Was this a repeat call? ☐ Yes ☐ No
- Did the agent comply with CMO requirements? ☐ Yes ☐ No
- Would this call be followed by management for call center purposes? ☐ Yes ☐ No

Additional Comments

For use by the manager to provide additional feedback to the agent.

Agent's comments:

Agent Comments

Needs Improvement ☆☆☆

- ★ Made an attempt to save the customer without stating any benefits of retaining service or other proposed alternatives to cancellation
- ★ Made an attempt to save the customer by selling the promotion / credit rather than the value of the service(s)

Example: We value your business and would hate to see you leave... agent proposes \$20 off for 6 months

Unsatisfactory ☆☆☆

- ★ Made no attempt to save the customer
- ★ Was overly aggressive, attempting to save the customer after the customer expressed frustration over the save attempt(s), or after the customer flatly stated that s/he did not wish to retain service under any circumstances
- ★ Failed to respond to threats of (future) cancellation, disparaging remarks about Comcast, or favorable remarks about a competitor
- ★ Did not make an alternative to cancellation, resell the value, provide alternative to

No attempt to Save: Customer: I want to cancel my service, I have had too many problems with

Agent: Ok, let me go ahead and get you to the department that will handle that for you. Or

Agent: Ok, give me just a moment and I will close your account.

Failure to respond: Customer: If you can't get someone out to fix this today, I am going to have to cancel. Agent: I can only put in a ticket

Example: We value your business and would hate to see you leave... (agent processes disconnect)



Comcast Quality Guidelines Repair

November 14, 2013

v2.0

WELCOME TO S4

What is S4?

S4 is a universal call flow that is centered on four key actions: Start. Solve. Sell. Summarize.

START. Start every conversation off right. Start with a friendly greeting!

SOLVE. Solve the customer's issue by asking the right questions. Solve it by taking action.

SELL. Sell a new product or service. Sell solutions to the customer.

SUMMARIZE! Summarize with a recap, review next steps, and personalize the close.

S4. Start. Solve. Sell. Summarize. Now you have a simple and effective way to provide a consistent, world-class call experience.

Evaluation of S4

A customer's call experience has a direct impact on our company's success. As a means to better each customer's experience, Comcast has developed S4 to measure your success while on the phone with customers. In this document, you will find instructional guidance for every criterion within the S4 framework and examples of expected behaviors.

HE: Highly Effective

ME: Meets Expectations

BE: Below Expectations

Your job as a customer-facing agent is to give every customer a great call experience every time. Agents will achieve a rating of Meets Expectations by meeting Comcast's very high standards for customer satisfaction on every call. If you consistently receive a rating of Meets Expectations, you are doing a great job. Remember, Comcast expects excellence as the norm.

Sometimes you'll have a chance to better your best and truly give the customer a wow experience. This will get you a rating of Highly Effective. Highly Effective is something that is not always attainable, and in fact, not always available.

Guiding Principles

- In order for any rating to be warranted (Highly Effective or Meets Expectations), all of the criteria in the bullets must be met.
- Criteria behaviors are not required to follow a specific order, although all behaviors must be exhibited at any opportunity throughout the call to qualify for points.
- All blue bolded text indicates the differences between the Meets Expectations and Highly Effective expectations.
- All 'Words that Work' samples reflect the highest rating available for each criteria.

WELCOME TO S4

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1. GREETING

Meets Expectations	Below Expectations
<p>Greet the Customer Clearly</p> <ul style="list-style-type: none"> ★ Used approved greeting without additional verbiage or branding added. Greeting includes: <ul style="list-style-type: none"> ○ Comcast Name ○ State First Name ○ Offer Assistance ★ Took time with greeting; was not rushed 	<p>Greet the Customer Clearly</p> <ul style="list-style-type: none"> ★ Did not include all of the below items in the greeting: <ul style="list-style-type: none"> ○ Use Comcast Name ○ State First Name ○ Offer Assistance OR ★ Added or removed verbiage to greeting ★ Spoke in a rushed or unintelligible manner
3 points	0 points

Words that Work

- Thank you for choosing Comcast, My name is Maria. How may I help you today?
- Thank you for calling Comcast. This is Harry. How can I assist you?

2. REFLECT REASON FOR CONTACT & RELATE / EMPATHIZE

Meets Expectations	Below Expectations
<p>Reflect Reason for Contact</p> <ul style="list-style-type: none"> ★ Reflected the specific reason for the customer's call, using the customer's words; avoiding trap, non-descriptive words such as "that" (example: I can definitely help you with "that.") ensuring accuracy of caller's situation and customer feels heard OR ★ Paraphrased or recapped the specific request/concern of the customer avoiding trap, non-descriptive words such as "that" (Example: I can definitely help you with "that.") ★ Paraphrased generally or briefly when customer gives a trap word such as I want to lower my bill, promo price, my bill just went up \$50, what deals do you have for me?, etc. 	<p>Reflect Reason for Contact</p> <ul style="list-style-type: none"> ★ Reflection/ recap is not specific or inaccurate ★ Used trap, non-descriptive words in the reflection or recap ★ Did not paraphrase or recap the specific request OR reflect the specific reason for the customer's call
5 points	0 points
<p>Relate or Empathize</p> <ul style="list-style-type: none"> ★ In situations where Comcast made a mistake or customer has shared a life event, problem, or has a general question, attempted to (briefly) empathize by acknowledging customers' stated feelings or relating to circumstances without blaming others or putting Comcast in a bad light 	<p>Relate or Empathize</p> <ul style="list-style-type: none"> ★ Did not acknowledge customer's situation/feelings as appropriate OR ★ Did not relate to customer circumstance ★ Identified with the customer's complaint by making a negative statement about a particular department, employee, or Comcast
5 points	0 points
<p>Take Ownership / Assure Assistance</p> <ul style="list-style-type: none"> ★ Assured customer that action would be taken to fulfill his/her request or to answer questions OR ★ Took ownership using positive words or phrases in a simple statement 	<p>Take Ownership / Assure Assistance</p> <ul style="list-style-type: none"> ★ Did not fully acknowledge/respond to customer's concerns/situation OR ★ Did not take any ownership to address the caller's stated question or issue
5 points	0 points
<p>Words that Work</p> <ul style="list-style-type: none"> • I can definitely help you set up your remote. I had the same question when I got a new tv. Now, I've become a bit of an expert. After we walk through this together, I can also share where you can find the directions online. • I am very sorry that you've had to call in again for the same issue. That would be frustrating to me, too. You've reached the right person. I can take a look... • So you said you are seeing a blank screen for channels 24 and 26? It's important to me that we get the channels that you like to watch working properly. Would it be possible for you to try a few things to troubleshoot the problem with me? 	

3. SET THE AGENDA / AUTHENTICATION / PLANT SEED

Highly Effective	Meets Expectations	Below Expectations
Set the Agenda ★ Asked permission to ask questions	Set the Agenda ★ Did not set the agenda	Set the Agenda ★ Did not set the agenda
Verify and Authenticate Caller ★ Attempted to obtain caller identifiers. Follow the below matrix based on screen pop activity and distinction of caller type (Authorized or Unauthorized). 1. Caller Name: Asked caller for their name 2. Account Verification: <ul style="list-style-type: none"> Collect TN to pull up account (if not already up) Have caller verify address (house number and street name) 3. Security of Account: If caller is Account Holder or documented Authorized User, collected information in the following order <ul style="list-style-type: none"> Collect last 4 digits of SSN or Account Number (if no SSN) If any other information being collected, please refer to the policy for guidance 		Verify and Authenticate Caller ★ Did not follow the Verify/ Authenticate Caller Process outlined OR ★ Did not provide a brief reason why information is to be collected or verified
Plant the Seed ★ Statement reflects intent to solve issue at hand then look to do an account review	Plant the Seed ★ Did not plant the seed	
4 points	2 points	0 points

Words that Work

Set the Agenda:

- I am reviewing your account and your services so that we can <insert reason for call>, I'd like to do an account review with you after we address your question/concern. Okay?
- As I review your account, may I ask a few questions that would help us understand how to address your question/concern?

Verify and Authenticate

- For security purposes, May I ask who I am speaking with? Thank you, <insert customer name>, I have your account on my screen, would you please verify your address with me?
- To access your account, would you please provide your address and phone number?
- To ensure I have to right account up, may I ask who I am speaking with? Thank you, <insert customer name>. I see that you are authorized on the account, would you please verify the last 4 digits of the SSN of the account holder?

Plant the Seed:

- After we look into your issue, I'd love to look at your account to ensure you are getting the best value for the services you have. Sound good?

Evaluator Notes

- Plant the Seed is only applicable if caller is the account holder or an authorized user*
- Refer to Policy for additional instructions and/or Regional specific guidance*
- If caller volunteers information, agent not required to ask in order*
- For CDV accounts, collect the CPNI PIN where appropriate. Please see CPNI process for further guidance.*

4. OBTAIN INFORMATION / PROBE THE PROBLEM

Highly Effective	Meets Expectations	Below Expectations
Probe the Problem/ Targeted Qs <ul style="list-style-type: none"> ★ Asked effective (both open-ended and closed-ended) questions to quickly obtain pertinent information and understand the customer needs ★ Engaged the customer throughout the questioning/problem-solving process ★ Made the process as "effortless" for the customer as possible ★ Asked follow up questions to <u>probe</u> for root causes or underlying issues, if applicable 	Probe the Problem/ Targeted Qs <ul style="list-style-type: none"> ★ Asked effective (both open-ended and closed-ended) questions to quickly obtain pertinent information and understand the customer needs ★ Engaged the customer throughout the questioning /problem-solving process ★ Made the process as "effortless" for the customer as possible 	Probe the Problem/ Targeted Qs <ul style="list-style-type: none"> ★ Did not ask clarifying questions or made assumptions surrounding the caller's issue ★ Did not give customer sufficient opportunity to describe the issue/question ★ Did not ask the right questions to solve the problem or obtain pertinent information ★ Made the troubleshooting process difficult for the customer ★ Asked questions in an abrupt, non-collaborative manner
7 points	4 points	0 points

Words that Work

Note: Grand slam LOQs would guide the agent in words that work. Look for behavior such as allowing the customer to answer the LOQ questions, volunteer their responses, avoid asking a question if the answer was volunteered earlier in the call to keep from making the customer repeat.

- So that I make sure I am taking care of all your needs, can you share tell me if this frequently occurs? Are there other issues you are experiencing? The reason I ask is because if you have questions about how to do other things with you services such as setting up your DVR using the Xfinity app, I can show you how to find answers on line as an alternative to placing a call for help.
- May I ask a few questions that would help us customize your services to fit your needs and budget?
 - What channels do you like to watch?
 - How do you use our internet product?
 - Do you make long distance or international calls?

5. RESOLVE / ADDRESS ISSUE(S)

Highly Effective	Meets Expectations	Below Expectations
Solve and Share Information for Primary Concern <ul style="list-style-type: none"> ★ Explained the basics of why customer's problem occurred without providing a long list of information ★ Information provided/action taken was complete and sufficient to resolve the inquiry or answer the customer's request. ★ Used appropriate tools and resources (Examples: Einstein, Casper, LOQs, GS) to support the interaction ★ Provided sufficient, relevant detail beyond what was necessary to resolve the inquiry ★ Proactively shared information/took action that might positively impact service or account status ★ Check for customer understanding or confirmation of resolution ★ Educated the customer on how to avoid the problem in the future (if applicable) 	Solve and Share Information for Primary Concern <ul style="list-style-type: none"> ★ Explained the basics of why customer's problem occurred, without providing a long list of information ★ Information provided/action taken was complete and sufficient to resolve the inquiry or answer the customer's request. ★ Used appropriate tools and resources (Examples: Einstein, Casper, LOQs/ITGs, GS) to support the interaction, per division policies 	Solve and Share Information for Primary Concern <ul style="list-style-type: none"> ★ Did not use appropriate tools/ resources to support the interaction (Einstein, Casper, LOQs/ITGs) ★ Provided incomplete or insufficient information to resolve the inquiry or answer the customer's request ★ Provided long or complicated list of information
Solve / Solution to Underlying Needs <ul style="list-style-type: none"> ★ Uncovered underlying issue(s) and provided specific solutions to resolve permanently, if applicable. (Example: Provided \$5.00 credit and changed code in system to reflect correct promotion) 	Solve / Solution to Underlying Needs <ul style="list-style-type: none"> ★ If underlying needs are revealed, solved for the issue ★ Did not uncover underlying issue and provide permanent solution, if applicable 	Solve / Solution to Underlying Needs <ul style="list-style-type: none"> ★ If underlying issues are uncovered, did not solve for the issue ★ Repeat customer contact is likely
14 points	7 points	0 points

Words that Work

- Referring to the modem being unplugged: And you wouldn't have even noticed it right away because of the backup battery... and that back up battery would have had the lights on for a while... and it finally died
- I hope that you don't experience this problem again, but if you do, you can try to reset the modem with the reset button on the back of the modem, like we did today.
- Based on the error message you just mentioned, I am going to refresh the signal on this box.....Great, I am glad that screen came back up for you. As a reminder, your guide can take up to another 30 minutes to fully refresh

6. BUILD VALUE / ENHANCE

Meets Expectations	Below Expectations
Build Value by Sharing Product Features and Benefits ★ Email capture or confirmation AND ★ Built up value through sharing features and benefits of at least one existing Comcast products, services, and/or the company that was tailored to/relevant to the customer's needs ★ Mentioned any value as applicable to the conversation Examples: ○ Self Service Options ○ Comcast Customer Guarantee Note: This can be done at any point in the conversation	Build Value by Sharing Product Features and Benefits ★ Did not attempt to capture or update email address ★ Did not mention any value of existing products and services ★ Did not provide any features or benefits of existing Comcast services.
6 points	0 points

Words that Work

- **No Email Address:** Can I please add an email address to your Comcast account? I want to make sure you receive important service related emails, such as the appointment confirmation email with a link that you can click if you need to reschedule.
- **Email address on account:** I see you have an email address on file of <insert email address>. Is this still a good email to use if we have important messages concerning your Comcast account like appointment confirmation or changes to your account?

Suggested Words that Work	Expectations Met
Can I get your preferred email address? That way we can send you important service notifications like account change confirmations.	Email capture + value statement about self service
I see you have a DVR – did you know that if you forget to schedule a recording, you can do it remotely on xfinity.net? That way you'll never miss one of your favorite shows.	Video customer: Self service + value add
Did you know you can watch recent episodes of <<program>> online on xfinity.com?	Video + Internet: Self service, value add
Were you aware that you can check your bill amount, due date, and pay your bill online if you log into your account at comcast.net? It's quick and easy to set up.	Any customer: Self Service
Do you still receive paper statements in the mail? Did you know you can sign up for paperless billing and see your statement from any computer, anytime if you sign in to your account at comcast.net?	Any customer: Self Service
We stand by our products and services with our Comcast Customer Guarantee, so there is no risk for you to start enjoying your services today.	Any customer : Comcast Customer Guarantee

Continued on Next Page

BUILD VALUE / ENHANCE

Cont'd

Words that Work

- We are always available to assist with your <troubleshooting> questions and needs, we have options including text message alerts and online access to your account. It's easy to set up at www.comcast.com/help
- We stand by our products and services with our Comcast Customer Guarantee, so there is no risk for you to start enjoying your services today...
- Were you aware that you can always check your bill amount, due date, and pay your bill on line using your Comcast ID?
- Did you know you can manage your account online? You can sign up for reminders for your bill and alerts by email and text online in using your Comcast ID. You will also receive any service appointment reminders as well. [Confirm e-mail address is captured in the biller]. www.comcast.com/help
- I can definitely help you with setting up your remote. I had the same question when I first set up mine. Now, I've become a bit more of an expert. After we walk through this together, I can also share where you can find the same help on line.

7. TRANSITION TO RELEVANT OFFER

N/A If Transition to Offer Not Applicable (See List Below)

Highly Effective	Meets Expectations	Below Expectations
Transition Based on Needs/Reset Agenda <ul style="list-style-type: none"> ★ Transitioned to explore sales opportunity after initial inquiry satisfied ★ Used bridging statements that reflect the resolution or action taken ★ Tied current service to potential upgrade opportunities or back to uncovered clues. ★ Asked probing/discovery questions to uncover additional needs on missing LOBs, services or tiers. ★ Reset the Agenda to ask questions in order to discover unmet needs to match to relevant offer 	Transition Based on Needs/Reset Agenda <ul style="list-style-type: none"> ★ Transitioned to explore sales opportunity after initial inquiry satisfied ★ Used bridging statements that reflect the resolution or action taken OR ★ Tied current services to potential upgrade opportunities or back to uncovered clues OR ★ Customers calling in with direct ask/intent to lead conversation down sales path (ex: lower my bill) 	Transition Based on Needs/Reset Agenda <ul style="list-style-type: none"> ★ Transitioned to sales prior to resolving issue ★ Did not transition to explore sales opportunity when appropriate ★ Did not use bridging statement
6 points	3 points	0 points

Words that Work

- Now that we have fixed your remote, I would like to review your account to ensure you and your household have all of the options available to you and you are getting the best value for your needs.
- Now that we have resolved all of your issues and your service is up and running correctly, do you mind if I take a quick look at your account and ask you a few questions to ensure you are in the best package to meet you and your family's needs.
- Do you remember when we talked about your new HD TV and you will need the proper equipment to get all the HD content? I would recommend a package offer that includes your HD equipment...
- Did you call from us from your home phone today? I noticed that you didn't have phone service on your account when we reviewed your account; we offer savings on phone service when you are already a Comcast customer.
- Now that we've resolved your issue, I'd like to review your account with you to ensure you are getting the most out of your service. I see you don't have our phone service. What are you doing for your home phone service?
- Now that we have scheduled that trouble call, let's get back to the discussion we were having around TV programs that you like to watch. Other than Boardwalk Empire, what kind of TV shows do you like to watch? Great, me, too.

Continued on Next Page

TRANSITION TO RELEVANT OFFER

Cont'd

Transition to Offer is Not Applicable in the Following Scenarios:

- Customer is irate or doesn't seem happy with resolution
- Caller could not authenticate account/unauthorized caller
- Caller is notated on account as unable to make changes
- Upgrade hold on the account due to delinquency (DST)
- Customer in a delinquent status; of more than 45 days past due (CSG)
- Pending work order or DOJ
- Tech arrival/ETA (cannot add to account with open work orders)
- Transfers/Escalations; immediate callbacks
- Scheduling TC for No Cable/No Internet/No Dial Tone/Outage, but agents should still offer SPP when applicable (no penalty for NOT selling SPP)
- Customer volunteers a "Don't sell to me" statement
- Customers, as qualified, possessing all LOBs, services, and highest tiers (nothing to sell)

8. PRESENT OFFER

N/A If Condition on List Below Occurs

Highly Effective	Meets Expectations	Below Expectations
Present Offer and Shared Benefits <ul style="list-style-type: none"> ★ Presented recommendation as an expert ★ Shared benefits of the products and services; offered value statement ★ Reflected back a couple of the needs the customer has shared ★ Presented offer with total bill amount 	Present Offer and Shared Benefits <ul style="list-style-type: none"> ★ Presented recommendation as an expert ★ Shared benefits of the products and services; offered value statement 	Present Offer and Shared Benefits <ul style="list-style-type: none"> ★ Did not share benefits of recommended product and services ★ Presented the price-point without benefits or value of the service(s) recommended
6 points	3 points	0 points

Words that Work

- Based on what you shared with me about how much your family uses the internet for entertainment, pay bills, and keep updated, I would definitely recommend our high speed internet service for the speed and how much content we offer online.
- You will be able to take advantage fast internet speed even when your whole family is online at the same time. We offer 7 email accounts, each with 10GB of storage. There's even an online security suite included in your service to keep your whole family protected while online. The package I am recommending will give you a significant discount over what you might pay today with another provider. Included in your service, your total monthly bill will be <insert amount>.

Transition to Offer / Present Offer is Not Applicable in the Following Scenarios

- Customer is irate or doesn't seem happy with resolution
- Caller could not authenticate account/unauthorized caller
- Caller is notated on account as unable to make changes
- Upgrade hold on the account due to delinquency (DST)
- Customer in a delinquent status; of more than 45 days past due (CSG)
- Pending work order or DOJ
- Tech arrival/ETA (cannot add to account with open work orders)
- Transfers/Escalations; immediate callbacks
- Scheduling TC for No Cable/No Internet/No Dial Tone/Outage, but agents should still offer SPP when applicable (no penalty for NOT selling SPP)
- Customer volunteers a "Don't sell to me " statement
- Customers, as qualified, possessing all LOBs, services, and highest tiers (nothing to sell)

9. OVERCOME OBJECTIONS

N/A If Agent Did Not Present Offer or Customer did not Object

Highly Effective	Meets Expectations	Below Expectations
Overcome Objections ★ Acknowledged the objection ★ Attempted to address all objections by specifically using customer's stated needs to overcome customer resistance to the offer of products/services AND/OR ★ Made clear that alternatives are available, but several discussed needs will be unfulfilled by those alternatives	Overcome Objections ★ Acknowledged the objection ★ Attempted to address resistance about purchasing product/service (Example: Re-emphasizing benefits of service or product being offered)	Overcome Objections ★ Did not attempt to overcome customer's resistance about purchasing product/service ★ Was overly-aggressive, re-attempting to sell after the caller clearly stated that they were uninterested in purchasing any products/services
4 points	2 points	0 points

Words that Work

- I understand, it's more than what you are paying today, but you will be able surf faster, watch more channels for the small increase.
- I want to make sure that I am recommending the best product for you based on what you shared with me earlier.

Objection	Response
I just saw an ad for \$48 bundle	That bundle is tailored for new customers to offer basic service. Can we take a minute or two to look at your current package?
I don't really watch TV	Is there anyone else in the house that watches TV? We offer a bundle for only <insert amount> that allows you to watch shows at better quality than you can get with your antenna.
It's too expensive	Well, what do you like to watch? I am sure that we can find a product combination that will fit your needs and your budget.
I use Netflix to watch online	You should definitely sign up for at least preferred Internet to get this with no skips.
Is there anything cheaper than that?	What do you use the Internet for? ... With level A, a typical song download takes approximately <insert time> seconds, while it will take <insert time> minutes with our lower priced Internet speeds
Why should I pay for Seasonal Suspend if I am not going to be there for four months?	<u>Savings</u> on installation charges when you come back and a reduced monthly rate while you are gone. <u>Continued Access</u> to the information you need: Video through Xfinity.com; Comcast Email through any internet connection via Comcast.net; Voice to keep your current phone number and access your Voicemail via Comcast.net; Home alarms will be supported (if already supported).

Continued on Next Page

OVERCOME OBJECTIONS

Cont'd

Acknowledgement / Transitional statements:

- I understand what you're saying / your concerns ...
- I appreciate that does sound like a good offer, but you will be giving up ...
- That makes sense, but please keep in mind ...

Addressing Objections:

- We can certainly look at other options, but you would lose <insert feature like capability/functionality/programming> which you mentioned was important to you.
- I understand that you want to talk with your spouse. May I ask you some questions so I better understand your concern? Or may I call you and your spouse back later to discuss this further?
- I understand that you and your wife use the internet more than watching TV. Do you watch movies or other type of programming on the internet? Love those shows too. Discuss programming where you need to be a TV subscriber that you would also be able to view via Xfinity Internet.

Examples / Coaching Guidance

- Agent should not presume to know customer's objection but probe to understand real issue
- **Overcome Objections Techniques:**
 - Feel: empathize, felt (personal example), found solution
 - **CARE:** Clarify, Ask questions, Resolve, End with a trial close
 - **ARP:** Acknowledge, Respond & Pivot
- **ARC:** Acknowledge, Respond & Close

10. PROACTIVELY ASK FOR THE SALE

N/A If Attempt to Overcome Objection was Unsuccessful

Meets Expectations	Below Expectations
Ask for the Sale ★ Asks for the sale using choice close, assumptive close, urgency close, or other technique	Ask for the Sale ★ Did not ask for the sale
4 points	0 points

Words that Work

- It will take only a few moments to update your services and I can make the change today so that you can start to enjoy....
- We stand by our products and services with our Comcast Customer Guarantee, so there is no risk for you to start enjoying your services today...

Technique	Example
Communicate Urgency	Typically our installation times fill up quickly, do you want me to hold an appointment for you and you can take some time to think about it?
Multiple Choice Close	<p>Sounds like you are looking for the best internet service. Would you like our Blast! or Performance speed of Internet?</p> <p>Sounds like you are looking for the best internet service. Let's set you up with either our Blast! speed of Internet. Let's get you set up with a self-installation kit or would you prefer a professional install?</p>
Assumptive Close	So why don't I go ahead and set you up with that, when would be a good day to activate your service?
Summary Close	So it sounds like you are looking for a bundle that has great educational channels such as TLC and Discovery channels, right?

11. SUMMARIZE ACTIONS

Meets Expectations	Below Expectations
Summarized Next Steps / Recapped / Reaffirmed Choice <ul style="list-style-type: none"> ★ Provided summary of what the customer can expect with enough detail to prevent a repeat call ★ If no next steps or expectations are needed, provided a brief recap of resolution/actions taken ★ Validated customers' decision to buy (if applicable) 	Summarized Next Steps / Recapped / Reaffirmed Choice <ul style="list-style-type: none"> ★ Did not recap actions taken OR ★ Did not summarize any next steps
7 points	0 points

Words that Work

- Your services will include some of my favorite things about Comcast service such as voicemail to email, being able to manage my DVR on line, being able to watch movies and shows on line, being able to manage my phone features on line, and the inclusion of Constant Guard.
- I'm glad we were able to clarify your bill for you today and added Xfinity Internet to your services. Great choice. I think you'll really enjoy it.
- Let's review what we have you down for: we have added Xfinity Internet service and you are now in a Triple Play bundle for a 12 month rate of <insert amount> which will then roll to <insert amount> in year 2 (including taxes and fees). There is a 1x modem activation fee of <insert amount>. A technician will arrive tomorrow between <insert appointment window> to install your new internet service. Someone 18 years or older must be available in the home. The technician will call your cell number, <insert phone number> prior to arrival. In order to ensure the technician arrives, please answer this call. As part of the Comcast Customer Guarantee we promise that our technicians will be equipped to resolve your issue on the first visit and arrive on time.
- Okay, so your signal has gone through. Your DVR will start working in about 5 minutes. You can expect to see To Be Announced for the next 45 minutes as the programming titles start to come through and the OnDemand service in about 30 minutes.

Evaluator Notes

- *When evaluating the detailed criteria in this section, the matrix on the following page is for guidance around possible information which could be provided.*

Continued on Next Page

SUMMARIZE ACTIONS

Cont'd

Summarization Guidance

Account Changes

Upgrade
Downgrade
Add-ons

Review all of the following, as applicable:

- All products/services sold
- Total package price, including promo roll-off date and pricing
- All applicable fees/charges (COS fee, Equipment Fees, Installation Charges, Surcharges, Shipping charges, Early termination fees, XSS enrollment fees)
- Taxes and surcharges
- Deposits: policy varies by region, but include information on how long it is held and when returned
- SIKs: shipping time, return existing equipment, pick up fee
- Prorates
 - First/next bill information
 - Mention/recap verbal agreement of ETF
 - Confirmed Third Party Verification process next steps are clear
- Payment assistance fee
- Re-activation fees when interrupted
- Late Fees

Appointments

Install
Service Call

Review all of the following, as applicable:

- Verify service address
- Pre-Call process
- Verify contact telephone number and input into call first field
- Technician arrival window
- Equipment must be in the home at time of installation (TVs, computers, telephones, etc.)
- Someone above the age of 18 must be present
- Potential charges for tech visit unless SPP on account
- Pets: ensure pets are contained from areas the technician needs to visit
- Email confirmation with appointment details
- Technician's process while in home (do not move furniture or customer's equipment)

Troubleshooting Recap

Review all of the following, as applicable:

- Remind customer of other pertinent information:
 - Resets: VOD, guide, and UCIS load times,
 - Parental control features
 - Service interruptions: 24 hours after for service
 - Password resets: How to reset password if ticket calls for password reset by Tier 2

**No Changes / Bill
Review
Credits**

- Next bill information
- Review of existing Services / Products
- Self Service Bill Pay Options (Paperless Bill, Bill Alert Text Messaging, Online One time Pay and Automated Payments)

12. CLOSE CONTACT

Meets Expectations	Below Expectations
Offer Additional Assistance <ul style="list-style-type: none"> ★ Offered additional assistance ★ For contacts where the issue remains unresolved, apologized for the inconvenience and made an offer of additional assistance 	Offer Additional Assistance <ul style="list-style-type: none"> ★ Did not offer additional assistance
Personalize close, customize to interaction <ul style="list-style-type: none"> ★ Customized, personalized statement demonstrating appreciation or pointing out a specific value regarding customers' services 	Personalize close, customize to interaction <ul style="list-style-type: none"> ★ Did not express appreciation or thanks OR ★ Did not point out specific value regarding customer's services
TRANSFERS - Used proper transfer courtesies <ul style="list-style-type: none"> ★ Advised customer who he/she is being transferred to and explain why a transfer is necessary. Waited for a response from customer. 	TRANSFERS - Used proper transfer courtesies <ul style="list-style-type: none"> ★ Transferred call while customer was explaining the issue ★ Cold transferred a call where the caller was extremely upset or where the call had been escalated
4 points	0 points

Words that Work

Offer Additional Assistance

- Is there anything else I can assist you with today?
- I am sorry that you experienced issues with your service. Is there anything else I can assist you with at the moment?

Personalize the close, customize to interaction

- I appreciate the opportunity to assist you today and I want to assure you that we are committed to provide you with superior customer experience.
- We value your business and feedback. I really appreciate you calling me and giving me the opportunity to correct this issue.
- I apologize for the confusion about <insert issue>. I appreciate you taking the time to talk with me today so I could help resolve the issue. I hope you have a wonderful day.
- Thank you for choosing Comcast, I hope you have a wonderful day.
- Thank you for calling Comcast. I hope you have a wonderful day.
- Thank you for calling Comcast. Hope you have a wonderful evening with your granddaughter.

Transfer

- Thank you for sharing the details with me.
- I will need to transfer you to an agent that will be able to assist you further; may I place you on a brief hold before you are transferred? You will need to provide the following information...

13. DOCUMENTATION

Meets Expectations	Below Expectations
Proper Documentation ★ Documented account with enough detail help future agents assist customer <ul style="list-style-type: none"> Who called (Caller Name) Reason for the call Actions taken 	Proper Documentation ★ Did not capture one or more of the following: <ul style="list-style-type: none"> Who called (Caller Name) Reason for the call How was issue resolved / actions taken and additional information (like next steps)
3 points	0 points
Words that Work <ul style="list-style-type: none"> I am capturing our conversation today on your account so that anyone assisting you will be able to tell what we worked on today. Excellent Documentation Template: <ul style="list-style-type: none"> Caller Name: <i>Actual caller name</i> Situation: Actions Taken: Resolution including next steps (if any): Grand Slam and/or ER Ticket # (optional): Misc. Notes including Benefits and/or Products Pitched for Sale and outcome: Evaluator Notes <ul style="list-style-type: none"> <i>If a promise is made to a customer that we are unable to process during the interaction, a notation of what customer was promised needs to be notated on the account</i> <i>Notations captured should be relevant to the call</i> <i>Evaluation of this standard is about what was actually done versus what was said.</i> 	

ADDITIONAL INFORMATION

BEHAVIORS

Consistently maintaining these behaviors is expected throughout each conversation.

Behavior	Rating	Description
Tone, Confidence & Clarity	Meets Expectations 3 points	<ul style="list-style-type: none"> Used professional, pleasant, upbeat, and energetic tone; using appropriate pleasantries (throughout the call) Spoke in a clear, unrushed pace; appropriately matched customer's tone Kept explanations simple and paused for customer understood. If jargon was used, provided explanation to customer.
	Below Expectations 0 points	<ul style="list-style-type: none"> Did not maintain professional, pleasant, upbeat, and energetic tone (throughout the call) Spoke in an abrupt or fast-paced manner. Therefore, Did not match customer tone Provided confusing explanations to customer
Active Listening	Meets Expectations 3 points	<ul style="list-style-type: none"> Provided frequent indications of active listening Did not intentionally interrupt or talk over customer Referred to information previously provided by customer to further the conversation
	Below Expectations 0 points	<ul style="list-style-type: none"> Forced customer to provide information multiple times Intentionally interrupted or spoke over the customer
Contact Management	Meets Expectations 3 points	<ul style="list-style-type: none"> Minimized pauses and dead air to 20 seconds or less, with pauses being brief and explained not impacting the flow of the interaction <p>If Applicable:</p> <ul style="list-style-type: none"> Hold: (60 seconds or less) Provided a specific explanation as to why hold was necessary; set realistic expectation for hold time Frequently checked back with customer if more time was needed
	Below Expectations 0 points	<ul style="list-style-type: none"> Displayed excessive dead air (+20 seconds) points without explanation <p>OR</p> <ul style="list-style-type: none"> Dead air/hold times impacted flow of interaction <p>If Applicable:</p> <ul style="list-style-type: none"> Hold: (60 seconds or less) did not adhere to all elements of hold guidance; explanation why, expectations for hold time, frequent check-backs
Acknowledge / Take Responsibility	Meets Expectations 4 points	<ul style="list-style-type: none"> Maintained role of an expert. Assured customer we are solving or have solved for issue Used positive word choice; did not use negatives or irritators (I'll try to do that, I don't know, unfortunately... like I said...it's our policy...) Presented a unified front by not placing blame or speaking negatively about another agent, department, process, or company
	Below Expectations 0 points	<ul style="list-style-type: none"> Neglected to assure customer we are solving, or have solved for issue Used negatives or irritators (I'll try to do that, I don't know, unfortunately...like I said...it's our policy...) Placed blame or speaking negatively about another agent, department, process, or company
Build Rapport and/or Demonstrate Concern	Meets Expectations 4 points	<ul style="list-style-type: none"> Showed a genuine interest or concern for customer's situation at each opportunity Acknowledged customers feelings as appropriate (anger, sadness, frustration, etc.) Used information provided by customer to personalize the interaction and build rapport by personally relating
	Below Expectations 0 points	<ul style="list-style-type: none"> Neglected to show genuine interest at one or more opportunities Neglected to acknowledge customers feelings/situation as appropriate (anger, sadness, frustration, etc.)

ADDITIONAL INFORMATION

SECTION FAILURE BEHAVIORS

Section Failures are defined as specific behaviors that could have negative implications to the customer or to the business.

Each of the below outlined section failures will constitute a removal of all points in the respective section noted.

Section Failure	Category Resulting in Zero Grade	Description
Under Authentication	S1 Start	<ul style="list-style-type: none">Failure to perform proper authentication according to National Authentication Policy which resulted in disclosing specific account information to a non-authorized user.
Account Actions	S2 Solve	<ul style="list-style-type: none">Misinforming customer of charges applied to accountFailure to advise/disclose any applicable fees (example: COS fee)Telling the customer one thing, then doing another/Failure to follow through – i.e. prices, packages, roll off dates, add-on's, upgrades, downgrades, applying a credit to the account, not scheduling a truck roll, customer asked to speak with a supervisor and failed to escalate (via ER ticket) <p><i>Evaluator Note: If a promise is made to a customer that we are unable to process during the interaction, a notation of what customer was promised needs to be notated on the account</i></p>
TPV Process, where required	S4 Summarize	<ul style="list-style-type: none">Failure to attempt TPV Process Appropriately, where required

ADDITIONAL INFORMATION

AUTO FAIL BEHAVIORS

Auto-fail behaviors are defined as specific behaviors; egregious or possibly unethical in nature, which could have negative implications to the customer or to the business.

Each of the below outlined auto-fail behaviors will constitute an overall grade of zero.

Auto-Fail Behavior	Description
Rudeness (verbal)	<ul style="list-style-type: none">• Acting rude, disrespectful or arguing with the customer• Refusal to escalate• Profanity/name calling• Hanging up on customer• Refusal to transfer a call
Call Avoidance	<ul style="list-style-type: none">• Failure to answer (not at desk, mute/unplugged)• Placing customer on hold to take a personal call• Engaging in side conversations• Surfing web for personal reasons, e.g. gaming, shopping• Working on non-work related materials
Inappropriate Transfer	<ul style="list-style-type: none">• Inappropriate Transfer - Blind Transfer to another CAE or Queue (does not include a cold or warm transfer)• Advocating for customers to contact another departments (Corporate Escalations, Ask Rick)

SCORING

SCORING GRID

Section	Criteria	HE Score	ME Score	BE Score	Points Possible	% of score	Section Weight
S1	1.Greeting		3.0	0.0	3.0	3.0%	22.0%
	2. Reflect , Relate, Empathize		15.0	0.0	15.0	15.0%	
	2a. Reflect Reason for Contact		5.0	0.0			
	2b. Relate & Empathize		5.0	0.0			
	2c. Take Ownership	5.0	0.0				
	3. Authenticate-Verify/Set Agenda	4.0	2.0	0.0	4.0	4.0%	
S2	4. Obtain Information/Probe the Problem	7.0	4.0	0.0	7.0	7.0%	27.0%
	5. Resolve/Address Issue(s)	14.0	7.0	0.0	14.0	14.0%	
	6. Build Value/Enhance/Promote		6.0	0.0	6.0	6.0%	
S3	7. Transition to Relevant Offer	6.0	3.0	0.0	6.0	6.0%	20.0%
	8. Present Offer	6.0	3.0	0.0	6.0	6.0%	
	9. Overcome Objections	4.0	2.0	0.0	4.0	4.0%	
	10. Proactively Close Sale		4.0	0.0	4.0	4.0%	
S4	11. Summarize Actions		7.0	0.0	7.0	7.0%	14.0%
	12. Close Contact		4.0	0.0	4.0	4.0%	
	13. Documentation		3.0	0.0	3.0	3.0%	
Behaviors	Tone, Confidence, Clarity		3.0	0.0	3.0	3.0%	17.0%
	Active Listening		3.0	0.0	3.0	3.0%	
	Contact Management		3.0	0.0	3.0	3.0%	
	Acknowledge / Take Responsibility		4.0	0.0	4.0	4.0%	
	Build Rapport / Demonstrate Concern		4.0	0.0	4.0	4.0%	
Section Failures	S1- Authentication		deducts 22 points				
	S2- Account Actions		deducts 27 points				
	S4- TPV Failure		deducts 14 points				
	Total Score	100	80		100.0	100.0%	