

OPPORTUNITY ANNOUNCEMENT



Intuit QuickBooks
Customer & Product Support



Service Revenue
\$14.00 per hour*
(\$7.00 per interval)

Service Revenue

**Hourly rate shown assumes the servicing of two, 30-minute intervals.*



Class Schedule
Phase I

09/12/2022 – 10/12/2022

Phase II - Earn While You Learn!

10/13/2022 – 11/02/2022

Class Times Offered
Monday – Friday

9:00 a.m. – 1:00 p.m. ET

2:00 p.m. – 6:00 p.m. ET

5:00 p.m. – 9:00 p.m. ET

Certification

Intervals Available*

Monday – Friday

9:00 a.m. – 9:00 p.m. ET

Special Servicing Requirements*

3 hours (6 intervals) required on Mondays



Servicing Times Available

Most Intervals Available

Monday

9:00 a.m. – 3:00 p.m. ET

Tuesday & Wednesday

9:00 a.m. – 2:00 p.m. ET

**Subject to change based on client needs*



Intuit QuickBooks Customer & Product Support

About the Client | Intuit Inc.

Intuit is an enterprise software company that develops financial and tax preparation software and related services for small businesses, accountants and individuals.

For more information about Intuit QuickBooks review the client's website <https://quickbooks.intuit.com/>



System and Equipment Equipment Must Meet Platform Standards [Click Here for System & Equipment Policy](#)

Additional Client Program Technology Standards

- Noise Cancelling Headset
- OS, hardware, network
- i5 (or equivalent), i7 recommended
- 8GB or more
- Win 8.1 (64bit) accepted, Win 10 (64bit) recommended & preferred (**Windows 11 is NOT supported**)
- Current OS patches (last 15 days)
- Anti-malware solution with current definitions (15 days)
- Active firewall
- Global Protect 5.0.2
- 1Mbs/expert network bandwidth for brick & mortar locations
- 5Mbs down, 3Mbs up network bandwidth for work @ home experts
- 250ms maximum RTT latency (less than 150ms recommended) to AWS Connect in



Intuit QuickBooks What to Expect When Servicing



What to Expect

On a day-to-day basis, Service Partners can expect to participate in the following activities:

- Interact with QuickBooks customers via phone, focusing on process related questions, data entry and navigation.
- Research, analyze and determine an appropriate course of action for QuickBooks customers.
- Be a positive representative for Intuit and the QuickBooks product; take a caring and empathetic approach to customer interactions.
- Articulate how to use the QuickBooks product accurately and efficiently resolve customer inquiries on the first contact. This includes having a thorough understanding of Intuit's suite of products and educating customers on those that best meet their needs.
- Provide quality customer service while demonstrating the ability to effectively troubleshoot and resolve advanced technical inquiries.
- Act as a technical resource when assisting customers to resolve problems with devices and equipment.



Capabilities of Top Performing Service Partners for this Program

- Outstanding problem-solving skills
- Displays patience, empathy, an ability to manage stress, the ability to work under pressure
- Skilled and efficient in writing and verbal communication
- Provides knowledgeable, friendly and eloquent customer service
- Knowledge and experience with Intuit QuickBooks Online or Desktop a plus



Intuit QuickBooks CERTIFICATION DETAILS

Instructor-led content, eLearning & Self-Paced Work

This phase is:

An overview of tools, knowledge, resources and practice call-time necessary to use client systems and provide quality service to client customers. This course requires strong attention to detail, lengthy periods of intense concentration, and a great deal of learner involvement and class participation

- 23 days in length: Four hours of instructor-led content per day and up to two hours of self-paced content daily.

Certification Call-Taking Earn While You Learn!

This phase is:

Live call handling during designated class times of approximately 40 intervals (20 hours) of service per week including one of daily call calibration or debrief

- Opportunity for learners to apply all that was learned in Phase I on live calls, while earning revenue and continuing to participate in instructor led sessions and self-paced content to expand understanding of client program.

See Page 1 For Class Dates and Times

100% attendance in instructor-led sessions is highly encouraged for success



Intuit QuickBooks CERTIFICATION DETAILS



Certification Completion Criteria

- 100% completion of daily self-paced modules each day as well as complete attendance of instructor-led sessions each day
- Completion of all assessments and knowledge checks with a score of greater than or equal to 80%
- Successful completion of all call simulations at 90% or better
- Successfully handle live customer calls by demonstrating proven customer service skills
- Completion of servicing time as indicated above with a 90% Commitment Adherence
- Minimum servicing of 30 intervals (15 hours) weekly with 90% Commitment Adherence
- Minimum of 90% attainment of client metrics compared to target
- All learners must complete the Service Partner Security Awareness self-paced course and score 85% or higher on the assessment before the last day of class in order to be certified



We highly suggest that you attend class every day - as this is critical to your company's success. If you are not able to attend a class, please advise your instructor. Failure to notify your instructor could result in being dropped from class with no refund.

Read complete course policies [here](#)

OPPORTUNITY ANNOUNCEMENT



THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK AND AFFIDAVIT OF IDENTIFICATION

You will be prompted to complete a background check during the enrollment process. Details on the type of background check and the requirements to pass it will be provided as you proceed through enrollment on the Arise® Portal.

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- You will be prompted to complete a background check during the enrollment process - if you have not completed one within six months of the class start date.
- The background check will include, but not be limited to, a check of disqualifying criminal convictions for at least the immediately preceding 10-year period.

IMPORTANT INFORMATION REGARDING BACKGROUND CHECKS

Please note if you have frozen your credit, you will have to temporarily lift the credit freeze with Experian. You do not need to lift the freeze at the other credit bureaus. Please lift the freeze for a minimum of 10 days. You will need to wait at least 24 hours before attempting the background check.

If you have recently changed your name, it may delay or disrupt the background check. Please make sure that full and correct legal name is included in your profile and provided in the background check step. Also, please ensure the Experian is aware of your name change.

Arise uses First Advantage to complete the background checks. Under certain circumstances, First Advantage may reach out to you to clarify your information. Your prompt response to First Advantage will accelerate the process of completing your background check and enrollment.

AFFIDAVIT OF ID

A completed, Affidavit of Identification with photo ID must be on file.

- To access the Affidavit of Identification form, log on to the portal, click on the AVA icon on the bottom right and select Affidavit Form.
- Make sure to follow all instructions and once completed, submit the form to AriseAffidavits@arise.com

Please note:

- Arise will not process system access codes, required to attend the certification course, until ALL enrollment pre-requisites have been successfully completed and provided to Arise.
- If the learner is removed or dropped from the opportunity for failure to complete all steps listed above, no refunds will be provided.



Service level requirements vary and are subject to change

Failure to meet one or more of the service level requirements may result in termination of the SOW. The service level requirements may be modified from time to time upon commercially reasonable notice to the business.

| Service Level Requirements | | Metrics Definition |
|--|-------|--|
| Commitment Adherence | ≥ 90% | % of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as: $\frac{[(\text{Serviced Minutes} + \text{Excused No Show Minutes}) / (\text{Selected Minutes} + \text{Released Lockdown Minutes})] \times 100$ |
| Net Promoter survey Score (NPS) | ≥ 70% | Average Net Promoter survey Score (promoters - detractors) for a given period |
| Average Handle Time (AHT) | ≥ 22 | Talk Time + Hold Time Average Handle Time is the average time spent resolving a customer issue, including talk time, hold time, transfer time (if applicable) and after call work |
| Case Compliance | ≥ 90% | % of cases documented in client system. |
| Transfer Rate | ≤ 5% | % of calls transferred to other departments |



Log-in codes are confidential, user specific and will only be generated for confirmed course attendee

All business's must ensure that their agents have a professional work environment, when in class and when servicing.

- Commitment Adherence is critical to this program. Businesses are responsible for ensuring that their agents service all intervals that have been accepted in StarMatic®.

You DO NOT QUALIFY to participate in this program if any of the following applies:

- Are currently enrolled in or contracted on another Intuit program.
- If you are servicing any Intuit product for any other company with which Intuit is contracted.
- Are already in "interested" status for another opportunity.
- The dates and/or times of the class for this opportunity overlap with a class for another opportunity you are already enrolled in.
- Were servicing one or more SOWs that were terminated for cause, including a 'Breach of SOW Client Policy' for this client program.
- Have a dropped status from 3 or more opportunities within the last 90 days, regardless of whether it is this program or a different one.
- Have a Commitment Adherence below 90%.

DISCLAIMER

This Opportunity Announcement (OA) is intended as a summary of the applicable business opportunity. It is not a legal document, nor a comprehensive review of all terms included in the applicable Statement of Work (SOW).

You should thoroughly review each SOW prior to executing it. In the event of a conflict between the OA and the SOW, the terms of the SOW will take precedence. Arise recommends a thorough review of all policies prior to enrolling in the certification course.