

“ Arise has outdone themselves this time! This is (in my opinion) the best client on the platform to service! They have a strong vision with a customer-centric approach. They are very inclusive and best of all supportive.

Wonderful certification with courteous and knowledgeable support during and after. Don't miss out on this amazing client. Do yourself a favor and enroll NOW! ”

**Mona B.**  
Service Partner  
Centurion Investments LLC

“ I've had the pleasure of being a part of CB Credit from the start. I feel it has enriched and challenged me as a working professional.

If you're looking for something that allows you to grow and share in customer happiness you don't need to look anywhere else. ”

**Teffany L.**  
Service Partner  
Archetype Management  
Services LLC



# Opportunity Announcement

“ I've been using the Arise® Platform for almost three years now. I have serviced quite a few programs. CB is by far my all-time favorite. Who knew helping a program succeed past the pilot would be so fun. I have had the pleasure of taking calls, assisting agents via chat, and even providing 1:1 support to agents. This program is not like any other. The support team is well-versed, and they care about succeeding as a group. The customers are not as demanding, and they respect us so much. CB has been an amazing opportunity for me, and I want to service this program for as long as possible. ”

**Felipe C. Agent - Diversity Dynasty LLC**



## IMPORTANT INFORMATION ABOUT THE CB PROGRAM!

You may be wondering who CB is. Well...due to client confidentiality, we cannot use the client's name or logo here - or throughout the platform - but take a look at the **About the Client** section on page 3 for specifics.

Once you see who the client is, you will understand why CB is a great opportunity for users of the Arise® Platform!

You will see that this opportunity requires a few extra steps in the enrollment process (details below and on page 7), but it will be worth it because the possibilities are endless!

### HERE'S YOUR CHECKLIST TO SUCCESSFULLY ENROLL IN THE CB OPPORTUNITY:

- Choose the CB Program (Yay! You already did this!)
- Pick Your Class Time (Are you a morning or evening person?)
- Complete the PC Scan (This should only take a few minutes.)
- Identity Verification through Incode (This should only take a few minutes.)
- Background Check (Just to verify that you are you.)
- Electronically sign CB forms (Don't worry, you'll receive an email with instructions.)

### ONCE YOU'VE CHECKED OFF THE ITEMS ABOVE, YOU'LL BE ENROLLED! (CONGRATS!). JUST A COUPLE MORE ITEMS TO TAKE CARE OF AND YOU WILL BE GOOD TO GO!

- Get your Fingerprinting done! (Details on page 7.)
- Start Class on 10/02/23! (We can't wait to see you! Don't be late!)

Opportunities like this fill up FAST! So...start the enrollment process NOW and reserve your spot in the CB class!

*\*Please review the Opportunity Announcement on the following pages for additional details.*

# OPPORTUNITY ANNOUNCEMENT



## Retail Services Inbound Customer Service



### Service Revenue

**Service Revenue**  
**\$14.50 per hour\***  
(\$7.25 per interval)

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



### Certification



### Class Schedule

**Phase I - Instructor-Led**  
10/02/2023 – 10/27/2023

**Phase II – Live Call-Taking**  
**Earn While You Learn!**  
10/30/2023 – 11/08/2023

### Class Time Offered

9:00 a.m. - 1:00 p.m. ET  
6:00 p.m. - 10:00 p.m. ET



### Servicing Times Available

#### Intervals Available\*

**Monday – Saturday**  
8:00 a.m. – 2:30 p.m. ET  
**AND**  
7:00 p.m. – 11:00 p.m. ET

#### Most Intervals Available\*

**Monday – Saturday**  
9:00 a.m. to 1:00 p.m. ET

#### Special Servicing Requirements\*

- 2 hours (4 intervals) required on Mondays
- 2 hours (4 intervals) required on Fridays and/or Saturdays
- 20 hours (40 intervals) required between 11/24/23 – 11/27/23 (Black Friday through Cyber Monday). This includes a minimum of:
  - 2 hours (4 intervals) on Friday, 11/24
  - 2 hours (4 intervals) on Sunday, 11/26
  - 2 hours (4 intervals) on Monday, 11/27

\*Subject to change based on client needs



## Retail Services Inbound Customer Service



### About the Client | Citibank

Citibank is the consumer division of financial services multinational Citigroup. Citibank's mission is to serve as a trusted partner to their clients by responsibly providing financial services that enable growth and economic progress. Their core activities are safeguarding assets, lending money, making payments and accessing the capital markets on behalf of their clients. They have 200 years of experience helping their clients meet the world's toughest challenges and embrace its greatest opportunities.



### System and Equipment

#### Equipment Must Meet Platform Standards

[Click Here for System & Equipment Policy](#)

#### Additional Client Program Technology Standards

- Dual monitors required
- Privacy Screen required
- USB Hardwired Headset with phone quality audio required
- MUST maintain the most recent version of Windows 10 or 11 (fully patched with no pending updates)



## Retail Services Inbound Customer Service What to Expect When Servicing



### What to Expect

- Handle inbound customer service calls from cardholders, which includes the following types of calls:
  - Online Web Services
  - Payments
  - Promotions
  - Account Status
  - Lost/Stolen Credit Cards
  - Credit Line Increases
  - General Account Maintenance
- Remain courteous with strong customer service orientation
- Research, navigate and locate answers to customer questions



### Capabilities of Top Performing Service Partners for this Program

- Required to adhere to compliance processes and policies
- Must possess good verbal and written communication skills
- Dependable, with attention to detail
- Superior listening skills and ability to function in a fast-paced environment where standards of quality and timeliness are established
- Possess procedure-driven judgment in order to find the best solution to an issue



## Retail Services Inbound Customer Service CERTIFICATION DETAILS

### Phase I: Instructor-Led & Self-Paced Work

#### In this phase:

Agents will learn about the client, how to navigate and use systems, tools and applications, and policies and procedures, ensuring high-levels of compliance.

IN-DEPTH: Requires strong attention to details, lengthy periods of intense concentration, and a great deal of learner involvement and class participation.

Four weeks: 4 hours Instructor-led learning per day and up to 2 hours Self-Paced content per day.

### Phase II: Certification Live Call-Taking Earn While You Learn!

#### In this phase:

Apply what you've learned in Phase I and start earning service revenue!

- Continue to work with Instructors and Support Resources and receive enhanced feedback.
- During the certification SOW, Service Partners are required to service a minimum of 10 hours (20 intervals) per week during times posted in Sarmatic and as outlined in the SOW. Please review the certification SOW for additional information, including the end date.

[See Page 1 For Class Dates and Times](#)

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



## Retail Services Inbound Customer Service CERTIFICATION DETAILS



### Certification Completion Criteria

#### PHASE I:

- Achieve 80% or higher on ALL assessments including mid-term, compliance and final assessments
- 100% completion of all self-paced modules, including client compliance modules
- Learners must successfully complete mock call certification

#### PHASE II:

- Learners must service an average of 3 hours (6 intervals) daily (15 hours per week)
- Learners must achieve 475 seconds AHT (Average Handle Time)
- Learners must demonstrate core compliance competency on compliance audits (no Verification, Dual Party Consent, Verbatim or PI errors of any kind)
- 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 strongly 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.**

**Important:** If you do not show up to class on the first day, you will be dropped from the class with no exceptions. The Class Confirmation Deposit of \$20.00 will not be refunded and you will need to enroll in a new opportunity if you wish to service a client program.

Read complete course policies [here](#)

# OPPORTUNITY ANNOUNCEMENT



**THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK, ELECTRONIC SIGNATURE OF CB FORMS, PHOTO ID VERIFICATION\*, AND FINGERPRINTING THAT MUST BE COMPLETED BEFORE DAY 1 OF CLASS.**

**Background Check:** 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.

**CB Forms:** You will receive an email from DocuSign which includes several forms you will need to (electronically) fill out and sign. You should receive the email approximately 48 hours after you pass your background check. Please make sure you follow the instructions and complete all the forms so you can complete your enrollment in the opportunity.

**\*Photo ID Verification and verification of the legal right to provide contracted services in the U.S.** You will need to provide a valid photo ID and submit certain documents verifying your legal right to provide contracted services in the U.S.

**Additional Verifications:** Education Verification (highest degree) and Employment Verification (all within last 7 years) will also be checked.

**Fingerprinting:** You will also be required to be fingerprinted. Fingerprinting can be completed, with no out-of-pocket expense, at [Biometrics4All](#) facilities.

**IMPORTANT – Once you are enrolled, watch your emails for a notification regarding fingerprinting. Keep in mind that once you receive the email notification for fingerprinting, the URL in the email will only be valid for 24 hours.**

**Secure Servicing Workspace:** - Service Partners are required to service in a secure environment avoiding access by unauthorized 3rd parties.

## IMPORTANT INFORMATION REGARDING BACKGROUND CHECKS

Please note a credit freeze will delay the process. 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.



# OPPORTUNITY ANNOUNCEMENT



## 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
<b>Commitment Adherence (CA)</b>	≥ 90%	% of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as: $\frac{[(\text{Serviced Minutes} + \text{Excused No Show Minutes}) / (\text{Selected Minutes} + \text{Released Lockdown Minutes})] \times 100$
<b>Average Handle Time (AHT)</b>	<ul style="list-style-type: none"> <li>• Production days 0 to 30 ≤ 390 seconds</li> <li>• Production days 31 to 60 ≤ 370 seconds</li> <li>• Production days 61 to 90 ≤ 350 seconds</li> <li>• &gt; 90 Days in Production ≤ 330 seconds</li> </ul>	The average length of a call, includes Talk Time, Hold Time and ACW Time.
<b>Representative Satisfaction (RSAT)</b>	<ul style="list-style-type: none"> <li>➤ 72% (Cert SOW)</li> <li>➤ 77% (Prod SOW)</li> </ul>	Defined as percentage of customers who responded as satisfied or very satisfied with service received from the Agent. Results derived from outbound surveys sent to customers by Client.
<b>Compliance</b>	≥ 100%	Compliance Evaluations Calls are monitored by CMT to determine if they meet our guidelines around Regulatory and Procedural compliance. The calls are scored Met/Not Met and RSCS compliance is based on total Met/total Evaluations.
<b>Recontact Rate</b>	< 9%	% of customers who call back within 48 hours



## 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:

- Have enrolled in or serviced any other banking industry client program in the past 6 months.
- 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.