

OPPORTUNITY ANNOUNCEMENT



**Intuit TurboTax Smartlook - Video Support
Inbound Customer Service
& Software Tech Support**

Limited Engagement Opportunity

Service Partners will service from 03/06/2024 through 04/30/2024

**Earn up to \$18.00 (CAD) per hour
(\$9.00 CAD per interval) with STAR incentives!**

Service Revenue

\$17.00 CAD per hour*
(\$8.50 CAD per interval)

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



**Service
Revenue**



Certification

Class Schedule*

Phase I

02/12/2024 – 03/04/2024

*No class on Monday,
February 19th

Class Time Offered

Monday – Friday

9:00 a.m. – 1:00 p.m. ET

2:00 p.m. – 6:00 p.m. ET

6:00 p.m. – 10:00 p.m. ET

Intervals Available*

03/06/2024– 04/30/2024

Sunday - Saturday

9:00 a.m. – 12:00 a.m. ET

Most Intervals Available*

Monday - Friday

9:00 a.m. – 6:00 p.m. ET

Special Servicing Requirements

From March 6th through April 29th

- 2 hours (4 intervals) required Saturdays or Sundays or a combination of both
- 2 hours (4 intervals) required on Mondays

Peak Week Requirements

20 hours (40 intervals) required on the following week:

- April 21st – 27th

Peak Day Requirements

- 5 hours (10 intervals) required March 30th or March 31st or a combination of both
- 5 hours (10 intervals) required April 29th or April 30th or a combination of both

**Subject to change based on client needs*



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About the Client | Intuit Inc. TurboTax



Intuit Inc. is an enterprise software company that develops financial and tax preparation software and related services for small businesses, accountants and individuals. TurboTax is a tax preparation software package and is one of the most popular income tax preparation software packages in North America. The software is designed to guide users through their tax returns step-by-step.

For more information about Intuit TurboTax review the client's website

<https://turbotax.intuit.ca/tax-software/index.jsp>



System and Equipment

Equipment Must Meet Platform Standards

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

Additional equipment is required.

Enrolled agents who have not serviced the program previously will receive a Logitech C170 Webcam which will be used while servicing.

If you previously serviced the TurboTax program, please use the webcam already provided to you.

Agents must also have:

- A USB headset with phone-quality audio will be required, examples include:
 - Logitech h390 USB headset & Plantronics Model C320.
- i5 Processor (or AMD equivalent) required (i7 processor preferred).
- 4GB memory required, 8GB memory preferred.



Intuit TurboTax Smartlook - Video Support Inbound Customer Service & Software Tech Support Limited Engagement What to Expect When Servicing

What to Expect



- Interact with Turbo Tax customers via phone and SmartLook™ screenshare and one-way video, focusing on tax related questions, data entry and navigation
- Research, analyze and determine an appropriate course of action for Turbo Tax customers
- Be a positive representative for Intuit and the Turbo Tax products; take a caring and empathetic approach to customer interactions
- Articulate how to use the Turbo Tax product accurately and efficiently resolve customer inquiries on the first contact
- 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

This opportunity is a limited engagement opportunity to service the Intuit TurboTax program during the very busy tax season (through 04/30/2024). Service Partners providing service to this program will be offered SOWs through 04/30/2024. A limited number of top-performing Service Partners may be offered SOWs to continue servicing the TurboTax program after 04/30/2024.

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
- Outstanding listening skills
- Provides knowledgeable, friendly, and eloquent customer service
- Understanding how to navigate and efficiently use tools



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CERTIFICATION DETAILS

PHASE I: Instructor-Led & Self-Paced Learning

In this phase:

Requires strong attention to detail, lengthy periods of intense concentration, and a great deal of learner involvement and class participation

Consists of three weeks: Four hours of instructor-led content and up to two hours of self-paced content per day

See Page 1 For Class Dates and Times

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



Intuit TurboTax Smartlook - Video Support Inbound Customer Service & Software Tech Support Limited Engagement CERTIFICATION DETAILS



Certification Completion Criteria

- Completion of 100% free daily modules and participation
- Must successfully pass 2 assessments with 75% or more with up to 4 attempts each
- Successful participation in role play scenarios with the instructor
- Successful participation in Live Calling Awards for Certification
- Achievement of 30 hours of service from the mixed certification phase
- Satisfaction of the all the requirements of quality and direct support, in accordance with the working conditions for certification
- All learners must take the self-paced partner safety awareness course and score at least 80% on the assessment



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](#)



SECURITY VERIFICATION ON THE ARISE® PLATFORM

THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK AND PHOTO ID VERIFICATION

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.

PHOTO ID VERIFICATION

You will be prompted to complete a Photo ID Verification using your mobile device during the enrollment process on the portal. Just make sure to follow the steps as indicated.

You will need to have your driver's license/ID card handy and be ready to take a selfie (example of the steps you will need to follow below)!



Please note:

- Arise will not process system access codes, required to attend the certification course, until ALL enrollment prerequisites have been successfully completed and provided to Arise.



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	$\geq 90\%$	% of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as $[\text{Serviced Minutes} / (\text{posted Minutes} + \text{Released Lockdown Minutes})] \times 100$
Net Promoter Score (NPS)	$\geq 60\%$	The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend the client's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with the client's product or service and the customer's loyalty to the brand. It is typically gauged through a survey administered after a call.
Customer Resolution	$\geq 85\%$	% of issues resolved on the first call
Documentation Rate	90% - 105%	% of cases documented in the client system
Average Handle Time (AHT)	12 – 15 minutes	Talk time + Hold Time

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Service level requirements vary and are subject to change

Star metrics and corresponding Incentives as well as bookings incentives are included in the Production SOW. Certification SOWs do not include Star metrics or bookings incentives.

Metric	*	**	***
Net Promoter	$\geq 65\%$	$\geq 65\%$	$\geq 65\%$
Intervals Serviced		≥ 25	≥ 25
Customer Resolution			$\geq 90\%$
INCENTIVE (Revenue Per Interval Serviced)	\$0.00	\$0.25 CAD	\$0.50 CAD

If a Service Partner meets the metrics listed above but does not have a CA of 90%, no Star Service Revenue Incentives will be paid.



Additional Information

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

- All Service Partners must ensure that their agents have a professional work environment, when in class and when servicing.
- Commitment Adherence is critical to this program. Companies 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.