We are so excited to share the Banking Pilot was a huge success! And the client is now officially added to our amazing roster of client programs.

You may be wondering who the banking client 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.

HIGHLIGHTS OF THIS PROGRAM INCLUDE*:

- Great service revenue potential with STAR Incentives
- Straightforward call type

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 BANKING OPPORTUNITY:

- [x] Choose the Banking 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.)
- [ ] Background Check (Just to verify that you are you.)
- [ ] Electronically sign client 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.)
- [ ] Complete Affidavit (Before Day 1 of Class. Details on page 7.)
- [ ] Start Class on 07/17/23! (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 Banking 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*

$250 SIGN ON BONUS

You may be wondering who this client 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 2 for specifics.

Certification

Class Schedule

Phase I -Instructor-Led*

07/17/2023 – 08/03/2023

Phase II –Live Call-Taking* **Earn While You Learn!**

08/04/2023 – 08/22/2023

Class Time Offered

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

6:00 p.m. -10:00 p.m. ET

Sign on bonus will be added to next paycheck after successfully servicng for 90 days working 30 hours a week with a CA of 93%. Must enroll with a client within 10 days of admissions in order to be eligible.

Servicing Times Available

Hours Available*

Sunday, Monday, Tuesday, Friday & Saturday 10:00 a.m. to 9:00 p.m. ET

Most Hours Available*

Sunday, Monday, Friday & Saturday 11:30 a.m. to 7:00 p.m. ET.

Special Servicing Requirements*

4 hours required on Saturdays and/or Sundays

*Subject to change based on client needs

OPPORTUNITY ANNOUNCEMENT

Retail Services

Inbound Customer Service

About the Client

Clients mission is to serve as a trusted partner to their customers 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 the greatest opportunities.

System and Equipment

Equipment Must Meet Platform Standards

Click Here for System & Equipment Policy

Additional Client Program Technology Standards

- Dual monitors 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)

OPPORTUNITY ANNOUNCEMENT

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:

  •Account status

  •Card product information

  • Disputes

  •Cash advances/checks

  •Balance transfers

  • Payments

  • Rates/fees

  •General account maintenance

  •Lost/stolen/fraud closures
- 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

Instructor-Led & Self-Paced Work

Phase I:

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.

Certification Live Call-Taking

Earn While You Learn!

Phase II:

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 per week during times selected 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

- Achieve 80% or higher on ALL assessments including mid-term and final assessment
- 100% completion of all self-paced modules, including compliance modules with the client LMS
- Learners must service an average of 4 hours daily during Phase 2 (Certification/Live Call-Taking)
- 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.

Important: If you do not show up to class on the first day, you will be dropped from the class with no exceptions. The No-Show fee of $20.00 will be charged and you will need to enroll in a new opportunity if you wish to service the client.

OPPORTUNITY ANNOUNCEMENT

THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK, ELECTRONIC SIGNATURE OF CLIENT FORMS, FINGERPRINTING AND AFFIDAVIT OF IDENTIFICATION 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 Portal.

Banking 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 72 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.

Fingerprinting: You will also be required to be fingerprinted. Fingerprinting can be completed, with no out-of-pocket expense, at Biometrics 4 All 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.

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.

Angel's Live Ops 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
BEFORE DAY 1 OF CLASS.

•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

Please note:

•Client will not process system access codes, required to attend the certification course, until ALL enrollment pre-requisites have been successfully completed.

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 (CA)	≥90%	% of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as: [(Serviced Minutes + Excused No Show Minutes) / (Selected Minutes + Released Lockdown Minutes)] x100
Average Handle Time (AHT)	• Production days 0 to 30 ≤390 seconds • Production days 31 to 60 ≤370 seconds • Production days 61 to 90 ≤350 seconds • > 90 Days in Production ≤330 seconds	The average length of a call, includes Talk Time, Hold Time and ACW Time.
Representative Satisfaction (RSAT)	≥72%	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.
Compliance	≥95%	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.
Transfer Rate	< 14%	Percentage of calls that have to be transferred in order to complete

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

- All agents must ensure that they have a professional work environment, when in class and when servicing.
- Commitment Adherence is critical to this program. Agents are responsible for ensuring that they service all hours that have been selected.

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

- Have serviced anyother 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. Angel's Live Ops recommends a thorough review of all policies prior to enrolling in the certification course.