OPPORTUNITY ANNOUNCEMENT

Bank & Trust Inbound Customer Service

Service Revenue

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.

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.

$250 SIGN ON BONUS

Certification

Class Schedule
Phase I*
08/21/2023 – 09/19/2023

Phase II - Earn While You Learn!
09/20/2023-10/02/2023 *No class on

09/04/23

Class Times Offered
8:00 a.m. – 12:00 p.m. ET

Servicing Times Available

Hours Available*
Monday – Friday
8:00 a.m. – 9:00 p.m. ET
Saturday and Sunday
8:00 a.m. – 8:00 p.m. ET
All Holidays
8:00 a.m. – 8:00 p.m. ET

Special Servicing Requirements*
2 hours required on Saturday and/or Sunday

*Subject to change based on client needs

Bank & Trust Inbound Customer Service

About the Client | Bank & Trust

Established in 1898 and headquartered in Raleigh, North Carolina, This Bank is a provider of a range of financial services to individuals, businesses, professionals and the medical community. The bank serves clients through a network of branch offices, telephone banking, online banking and ATMs.

Additional Client Program Technology Standards

Service Partners will need one of the following types of phone lines to service the Bank & Trust program:
- POTS (Plain Old Telephone) line(hard-wired to wall outlet)
- Cable telephony (connected directly from router/modem device)
- Digital service (connected directly from router/modem device)
- VoIP through a physical hard phone, i.e., a tangible device that sits on your desktop
- Hardwired telephone and headset or keypad/headset, e.g., AGP Tek or Plantronics
- Dual monitors are strongly recommended
- MUST maintain the most recent version of Windows 10 or 11 (fully patched with no pending updates)
- Apple or Android cell phone is required for secondary code verification

Bank & Trust Inbound Customer Service
What to Expect When Servicing

What to Expect

On a daily basis for the Bank & Trust Program:

- Serve as an initial point of contact on banking inquiries and concerns.
- Provide support for existing and prospective clients via inbound telephone calls.
- Resolve concerns on retail, commercial, and online banking as well as bankcard, fraud, forgery, ID theft, policy, and procedural questions.
- Identify cross-sell opportunities and make referrals as appropriate.
- Provide accurate, confidential client service through bankcard, business online banking, or general servicing knowledge.

Capabilities of Top Performing Service Partners for this Program

- Outstanding Prioritization skills
- Display patience and empathy
- Skilled and efficient in writing and verbal communication
- Provide knowledgeable, friendly and eloquent customer service

Bank & Trust 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 learn policies and procedures, ensuring high-levels of compliance.

Instructor-Led:
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 coaching and feedback.
•During the Certification SOW, Service Partners are required to service a minimum of 15 hours per week during times posted in the SOW. Please review the Certification SOW for additional information, including the end date.

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

Bank & Trust Inbound Customer Service

CERTIFICATION DETAILS

Certification Completion Criteria

- Successfully pass all assessments scoring 85% or higher

- Score an average of 85% on 2 QA Evaluations during the first 5 days of taking calls

- 100% completion of all self-paced modules, including compliance modules

- 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 clas

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.

THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK, DRUG SCREENING AND AFFIDAVIT OF IDENTIFICATION

You may 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.

• The background check will be required to be completed either before or after enrollment - depending on the client program.
• Failure to complete the background check may result in an agent being dropped from the course.

Upon submission of the background check, you will be sent an email (within 24 hours) containing information pertaining to the drug screening from the third-party vendor: First Advantage (FADVReports-NoReply@fadv.com).
• ~~If you have not received the e-mail~~ within 24 hours of submission of your background check, please notify the Client portal chat. Please be sure to check your SPAM and/or Junk mailboxes in case the email is there

• The background and drug screening must be successfully completed within three business days. If this is not done, the learner will not be able to gain access to client systems

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. Our client 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 submit.

Please note:

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

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
Call Quality	≥ 90%	% of evaluated calls receiving a Quality score of 90% or better / total calls evaluated
Average Handle Time (AHT)	Between 400-500 seconds	The average length of a call, includes Talk Time, Hold Time and ACW Time
First Call Resolution (FCR)	≥ 85%	% of customer inquiries that are resolved on first contact
CSAT	≥ 87%	Level of happiness expressed by the customer at the end of the call

STAR metrics requirements vary and are subject to change.
Star metrics and corresponding incentives are included in the Production SOW.
Certification SOWs do not include Star metrics.

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

- All agents MUST 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 intervals that have been accepted.

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

- Has been contracted and providing services on 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. Angel's Live Ops recommends a thorough review of all policies prior to enrolling in the certification course.