



MY BUSINESS CARE TEAM
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My Business Care Team

OUR CALL CENTER AGENT PROCESS

Discovery Call: <https://meetings.hubspot.com/ankit98/discovery-call>

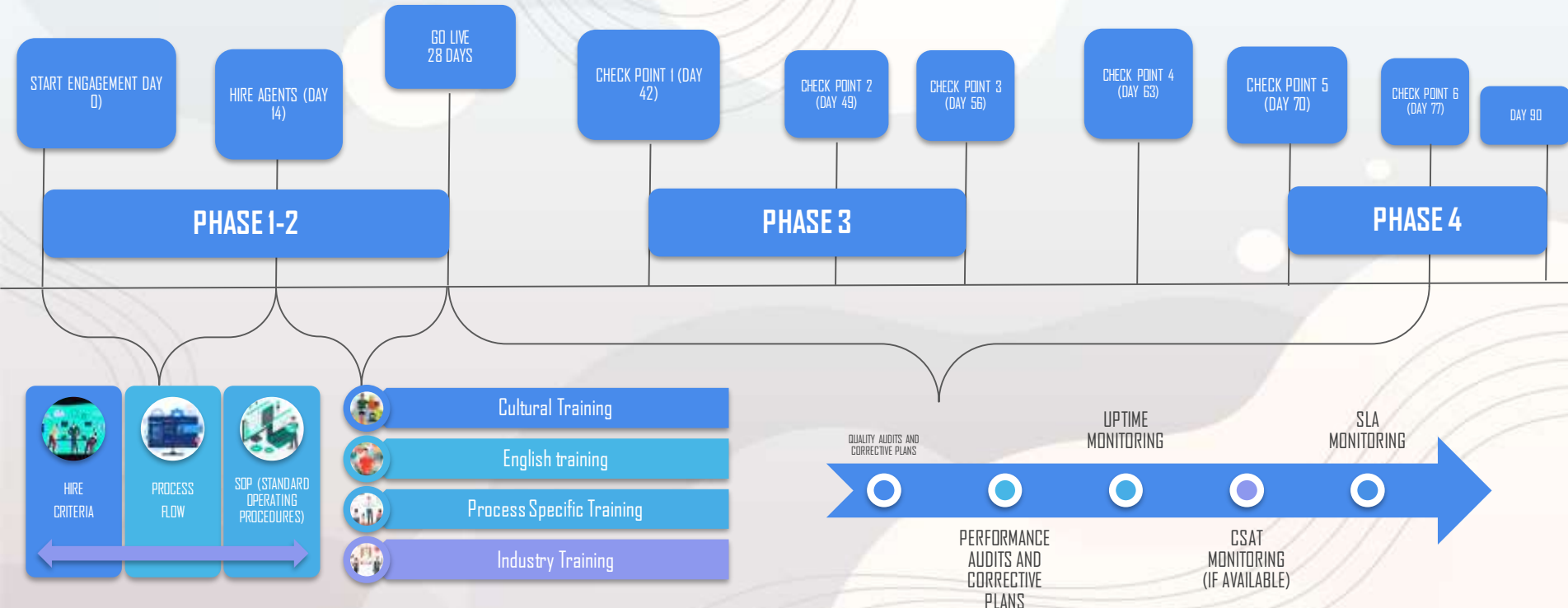
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***Industry average is 104 days vs 77 days



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AFTER HIRE RAMP PROGRESS WITH MY BUSINESS CARE TEAM



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PHASE I

START ENGAGEMENT

-28 days to -14 days from go live

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SOURCING AND HIRING

- Gather agents from several sources like recruiters, job boards, and social media
- Create a list of behavior based questions for the position
- Create a list of psychological profiles we want for this position
- Vetting Applicants
 - Look for matching personality profiles
 - Look for resumes that would be a good match
 - Look for responses on our job application
 - Look at english test scores
 - Look at IQ scores
 - Look at typing speed scores
- Interview process
 - Round 1: Video interview
 - Cover job basics
 - Validate communication skills
 - Validate behavior based questions
 - Validate logistics and pay
 - Round 2: In person interview
 - Deeper dive into behavior based questions
 - Test them on skill
 - Quality Audit Skills
 - English Skills
 - Learning speed assessment
 - Background check and reference checks
- Hire and Onboarding



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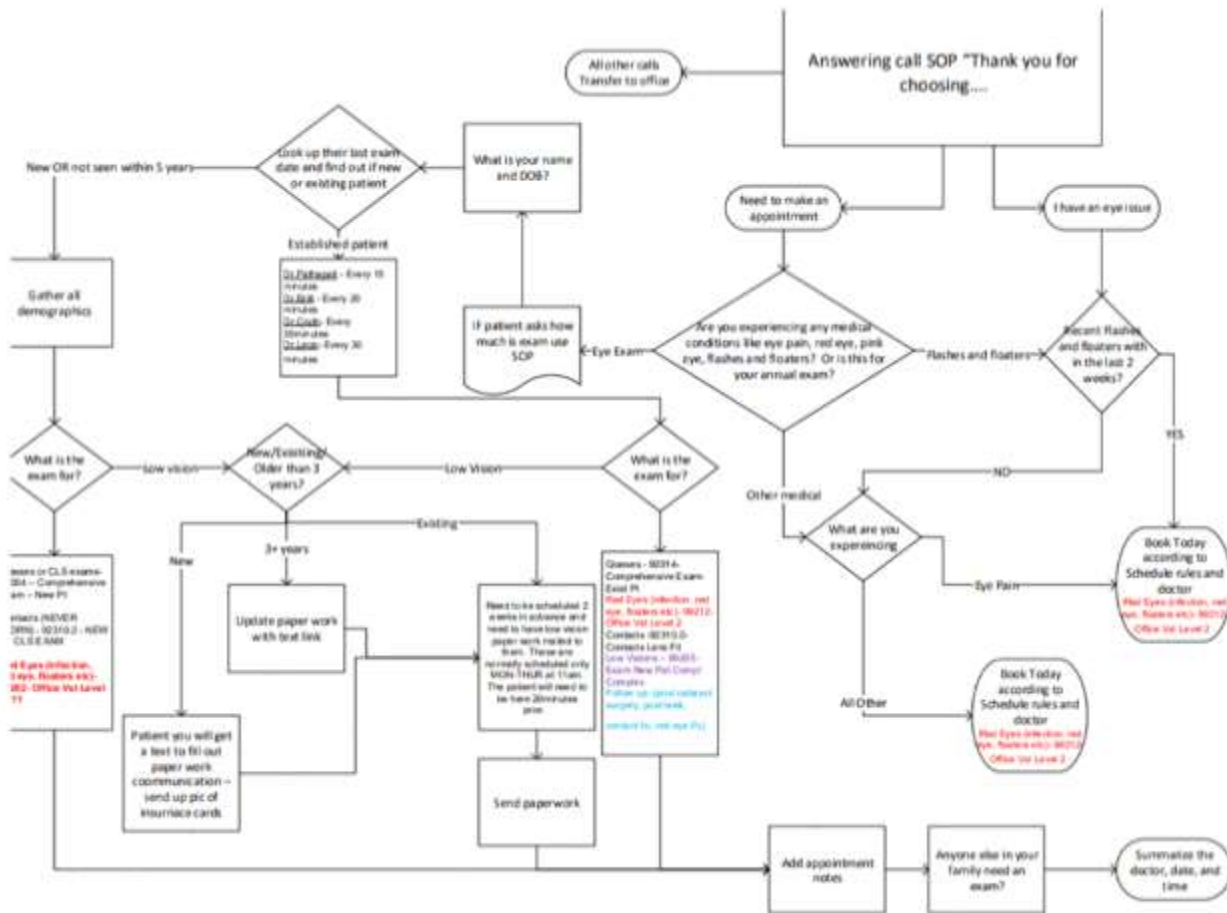
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EXAMPLE OPTOMETRY PRACTICE APPOINTMENT SETTING STANDARD OPERATIONS PROCEDURE - TABLE OF CONTENTS

INTRODUCTION

PATIENT IDENTIFICATION

PURPOSE OF THE CALL

PATIENT'S CURRENT SITUATION and APPOINTMENT STRUCTURE

- a. Patients who needs an appointment
- b. Patients advising of an eye issue
- c. Patients who needs Eye Exam and/or CL Follow-up or Cataract Post-op
- d. Other Appointment Structures and Guidelines

CLINIC SCHEDULE

Monday, Tuesday, Thursday, Friday

Wednesday

Saturday

PRICING

FAMILY APPOINTMENTS

RECAP AND CLOSING





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PHASE 2

AGENTS HIRED AND TRAINING

-14 days to GO LIVE

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CULTURAL /ENGLISH TRAINING TABLE OF CONTENTS

CULTURE TRAINING

- [CHARACTERISTICS OF US CULTURE](#)
- [AMERICAN CULTURE & SOCIETY](#)
 - [Religion & Beliefs](#)
 - [The Family](#)
 - [Social Stratification](#)
 - [Gender Roles](#)
 - [Socialization](#)
 - [Economy](#)
 - [Food](#)
 - [Arts, Humanities & Popular Culture](#)

AMERICAN SOCIAL CUSTOMS & ETIQUETTE

- [Naming conventions](#)
- [Meeting & Greeting](#)
- [Communication style](#)
- [Personal Space](#)
- [Gift Giving](#)
- [Dining & Food](#)
- [Visiting a home](#)
- [Taboos](#)
- [What to wear](#)
- [Titles](#)
- [Business cards](#)
- [Meetings](#)
- [Negotiating](#)
- [Management](#)

LANGUAGE TRAINING

- [Level 5 American English: Diagnostic](#)
- [Topics](#)
 - [I. The English Meeting that Started it All](#)
 - [II. An American Seminar You Won't Want to Miss!](#)
 - [III. Get the Best Panelists for your American Seminar](#)
 - [IV. Invert Your English Sentences for Extra Emphasis!](#)
 - [V. Using Reported Speech in English](#)
 - [VI. Use the Right English Preposition Combinations for Effective Negotiations](#)
 - [VII. Using Active and Stative English Verbs](#)
 - [VIII. Place Your Adjectives Right for a Bright Future in](#)

ENGLISH

- [IX. Trying to Foresee the Unforeseeable in the US](#)
- [X. What Do You Get When You Cross Economics and Music in the US?](#)
- [XI. Finding a Place to Call Home in the US](#)
- [XII. Designing an English Website that Works](#)
- [XIII. How to Get Special Pricing at an American Hotel](#)
- [XIV. You Must Stick to the Agenda in American Meetings](#)
- [XV. Offering Your English Condolences](#)
- [XVI. Getting Your English Script Right](#)
- [XVII. Are You Able to Spell This Complicated Name in English?](#)
- [XVIII. This American Salesman Should be Reported!](#)
- [XIX. The Deal That Needed to be Negotiated](#)
- [XX. Receiving an English Invite to an Exclusive Dinner](#)
- [XXI. You Have to Remember Your Plane Ticket in the US!](#)
- [XXII. Discussing Tense Environmental Situations in English](#)
- [XXIII. Would you Rather Buy Biofuels in the US](#)
- [XXIV. Is Your American Workshop Going in the Wrong Direction](#)
- [XXV. Looking to the Future in the US](#)
- [Level 5 American English: Exam](#)



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INDUSTRY SPECIFIC TESTING

- Study Material
 - Basic Terms for optometry/ophthalmology
 - ADA certified paraoptometric training material
 - In house training from Classic Vision Care
- Assessment
 - Tests to assess memorization of terms and industry knowledge

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PROCESS SPECIFIC TRAINING

- Training Material
 - Create Training material with the SOPs and diagrams that have been established
 - Create testing material
 - Create scenarios for phone calls
- Testing
 - Run mock calls and pass an assessment score
 - Take the process assessment quiz and pass

Goal	Date	Progress Target	Actual
Checkpoint 1	Day 7	80%	83%
Checkpoint 2	Day 9	80%	89%
Checkpoint 3	Day 10	85%	90%



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PHASE 3

GO LIVE

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RAMP PROJECTIONS AND TARGETS FOR THE PRACTICE

Goal	Date	Service Level Target	Actual
Calls Answered	4/14/2023	45%	62.9%
Calls Answered	4/21/2023	50%	59%
Calls Answered	4/28/2023	55%	
Calls Answered	5/5/2023	60%	
Calls Answered	5/12/2023	62%	
Calls Answered	5/19/2023	62%	

Goal	Date	Quality Audit Target	Actual
Quality	4/14/2023	80%	81%
Quality	4/21/2023	85%	80%
Quality	4/28/2023	87%	
Quality	5/5/2023	90%	
Quality	5/12/2023	92%	
Quality	5/19/2023	94%	

Goal	Date	Talk Time Target	Actual
Productivity	4/14/2023	5:00	4:28
Productivity	4/21/2023	4:30	4:09
Productivity	4/28/2023	4:00	
Productivity	5/5/2023	3:48	
Productivity	5/12/2023	3:45	
Productivity	5/19/2023	3:30	

Patient Satisfaction is provided by client if applicable.

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QUALITY PROCESS

- 1 audit per day per person
- After audit feedback is delivered and action plan created if needed
- If action plan created we increase the frequency of audits on that person until we see an improvement in score with 3 audits in the green. Green is audit score of 94% or better

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PRODUCTIVITY AND CALLS ANSWERED PROCESS

- Refining the SOPs
- Training and quality audits
- Time in service to improve efficiency

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PHASE 4

ONGOING SUSTAINING PERFORMACNE

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DAY TO DAY MONITORING

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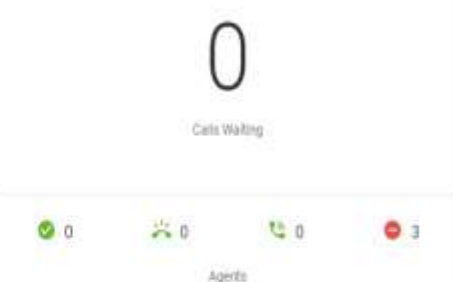
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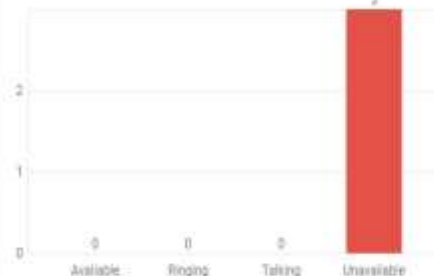
Queue Calls



Queue Monitor



Agents Count



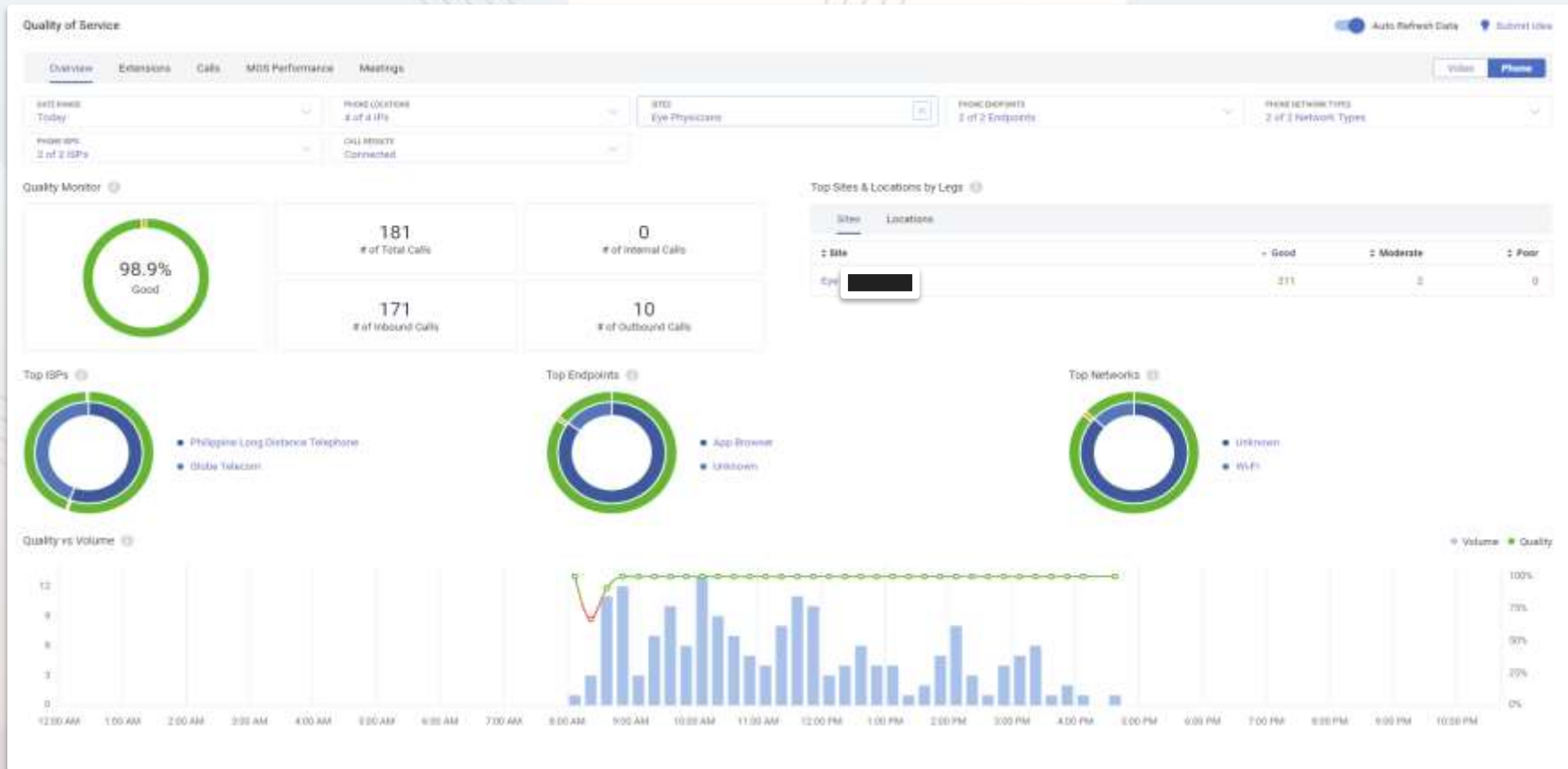
Agent Details

Agent	Queue	Ring Member	Status	Inbound Calls	Answered Calls	Overflow Answ...	VM Redirects	Outbound Calls	Outbound Ans...	Outbound Un...	Total Talk Time	Inbound Talk T...	Total Hold Time	Average Hol...
Hansee Babatunji	1(1)	0/1	Unavailable	48	48	0	0	3	3	0	02:58:28	02:53:23	00:00	00:00
Eye [REDACTED]	No		Unavailable	48	48	0	0	0	0	0	02:53:23	02:53:23	00:00	00:00
Danree Omega	1(1)	0/1	Unavailable	78	78	0	0	2	2	0	03:07:41	03:05:45	08:44	01:44
Eye [REDACTED]	No		Unavailable	78	78	0	0	0	0	0	03:05:45	03:05:45	08:44	01:44
Ashley Rama	1(1)	1/0	Unavailable	52	45	0	7	5	5	0	03:52:28	03:13:36	00:00	00:00
Eye [REDACTED]	Yes		Unavailable	45	45	0	0	0	0	0	03:13:36	03:13:36	00:00	00:00

Queue Details

Queue	Inbound Calls	Answered Calls	Abandoned Calls	Average SoA	Longest Wait	Shortest Wait	Average Hold	Total Talk Time	Average Talk Time	Avg. Time to Abandon
Eye [REDACTED]	278	171	102	02:53	15:04	00:03	01:44	09:12:45	03:13	03:57

QUALITY OF SERVICE MONITORING - QUALITY OF CALL AUDIO



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PHASE 5

ONGOING RAMP

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MEETING CADENCE

- Engagement (day 1) to Go Live (Day 28)
 - As needed at least 1x a week to review processes
- Go Live (day 28) till end of ramp (day 77)
 - Daily huddles preferred with a point of contact to review performance and any issues
 - Update and modify any SOP, process changes
- Post Ramp
 - 1x a week meeting optional with team to review performance.

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