

Occurance	Process Change	Next Steps	Dependencies	LOE	Est. Completion
Disposition confusion / unstructured	Redefine how dispositions structured and categorized	CX redefine, document and implement change with TPV system	CX	Low	Oct. 2016
Customer has general question at any point during call	<p>GTI asks if customer requires answer to question prior to completion of TPV.</p> <p>If no: GTI completes TPV, offers to transfer back to Ambit. - customer agrees: GTI thanks for time and trx call - customer says not right now, GTI thanks for time and provides 800#</p> <p>If yes: GTI explains TPV not complete and account not yet active. Warm transfers to Ambit agent or provides 800# if cust needs to call back.</p>	<p>Incorporate into existing TPV scripts</p> <p>Notify GTI, Ambit teams affected (care, consultant support, field) and consultants</p>	<p>Verify system</p> <p>Training</p> <p>CX</p>	Low	Oct. 2016
<p>Customer with general question or basic data invalid</p> <p>DOB</p> <p>Billing address</p> <p>Utility number</p> <p>SS#</p> <p>Service address (spelling or suffix)</p>	<p>GTI explains TPV not complete and account not yet active. Warm transfers to Ambit agent.</p> <p>Ambit agent: - verifies customer on call - answers question/updates data and verbal confirmation - confirms all other data points in BN are correct - adds note to BN - transfers back to GTI</p> <p>BN records all updates and retransmits/refreshes data to GTI script</p> <p>GTI starts fresh TPV call</p>	<p>Incorporate process change into TPV scripts</p> <p>Update Ambit process and train agents</p> <p>Work with Dev Opps to make sure BN recording updat and refreshing TPV script in real-time</p>	<p>Verify system</p> <p>GTI</p> <p>Dev Opps</p> <p>Training</p> <p>CX</p>	Medium	Nov. 2016
T&C not provided/received	Agent documents sending new digital or paper copy - add track my mail to verify delivery	<p>Confirm that this is official part of process</p> <p>Add "track-my-mail" type of delivery confirmation (different from first class delivery)</p>	<p>CX</p> <p>Fulfillment</p> <p>Training</p>	Low	Oct. 2016
<p>Soft decline causes potential fail</p> <p>Wrong time to call</p> <p>Left message</p>	<p>GTI explains urgency of completing TPV call and sets new time (wrong time) or leaves message - BN note added</p> <p>After third attempt, BN records failed completion and notifications are triggered for both customer and consultant</p> <p>Consultant limited to one resubmission per account per three month cycle</p>	<p>Incorporate changes into TPV script and notify GTI, Ambit teams affected (care, consultant support, field) and consultants</p> <p>Work with Dev team to adjust calls delivered to GTI queue vs notification triggers</p> <p>Work with Dev team to create triggers and delivery of various notifications</p> <p>Work with MarCom/Marketo to create notification design and copy, and PowerZone update</p> <p>Implement policy for TPV limit per customer, per consultant</p>	<p>Verify system</p> <p>GTI</p> <p>Dev Opps</p> <p>MarCom</p> <p>Field/Conslt Support</p> <p>Training</p> <p>CX</p>	<p>Policy and call attempt change - Low</p> <p>Notifications - High</p> <p>TPV submission limit - Low</p>	Q1-2017
<p>Hard decline / possible recovery</p> <p>Unauthorized incentives</p> <p>Unauthorized to switch</p> <p>Changed mind</p> <p>Questions on order</p> <p>Doesn't agree with type of order</p> <p>Refuses to pay deposit</p> <p>Refuses product</p> <p>Refuses charges</p> <p>Refuses Gas/Electric service</p> <p>Refuses to switch</p> <p>Refuses TOS or T&C</p> <p>Refuses to be recorded</p>	<p>GTI warm transfers call to Ambit Inside Sales to recover order</p> <p>If save: Ambit notates BN and trx call back to GTI - BN records status update and refreshes TPV script - GTI starts new call with refreshed script</p> <p>If loss: Ambit notates BN and thanks customer for time - BN records status change, consultant notified in PowerZone and with push notification</p> <p>Consultant limited to one resubmission per account per three month cycle</p>	<p>Incorporate changes into TPV script and policy, notify GTI, Ambit teams affected (care, consultant support, field) and consultants</p> <p>Work with Dev team to create triggers and delivery of various notifications</p> <p>Work with MarCom/Marketo to create notification design and copy, and PowerZone update</p> <p>Implement policy for TPV limit per customer, per consultant</p>	<p>Verify system</p> <p>GTI</p> <p>Dev Opps</p> <p>MarCom</p> <p>Field/Conslt Support</p> <p>Training</p> <p>CX</p>	<p>Policy change - Low</p> <p>Notifications - High</p> <p>TPV submission limit - Low</p>	Q1-2017
<p>Hard decline causes fail</p> <p>Customer hangs up/refuses call</p> <p>Wrong number</p> <p>Disconnected number</p>	<p>BN records status change after one attempt, consultant notified in PowerZone and with push notification</p> <p>Consultant limited to one resubmission per account per three month cycle</p>	<p>Incorporate changes into TPV script and policy, notify GTI, Ambit teams affected (care, consultant support, field) and consultants</p> <p>Work with Dev team to adjust calls delivered to GTI queue vs notification triggers</p> <p>Work with Dev team to create triggers and delivery of various notifications</p> <p>Work with MarCom/Marketo to create notification design and copy, and PowerZone update</p> <p>Implement policy for TPV limit per customer, per consultant</p>	<p>Verify system</p> <p>Dev Opps</p> <p>MarCom</p> <p>Field/Conslt Support</p> <p>CX</p>	<p>Policy and call attempt change - Low</p> <p>Notifications - High</p> <p>TPV submission limit - Low</p>	Q1-2017