

State of Florida



Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD
TALLAHASSEE, FLORIDA 32399-0850

-M-E-M-O-R-A-N-D-U-M-

DATE: December 8, 2009
TO: Ann Cole, Commission Clerk - PSC, Office of Commission Clerk
FROM: Kevin J. Bloom, Economic Analyst, Division of Regulatory Analysis *KJB*
RE: Aqua Utilities Florida, Inc., Docket No. 080121-WS

Please include the following attachments in the docket file in Docket No. 080121-WS. Attachments include: 1. Letter from Aqua Utilities Florida, Inc. manager of rates Troy Rendell dated November 24, 2009; letter from Beth Salak to Aqua Utilities Florida, Inc. regulatory affairs manager Kimberly Joyce dated October 1, 2009 with attached data request; and Aqua Utilities Florida, Inc.'s response to the data request.

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DOCUMENT NUMBER - DATE

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FPSC - COMMISSION CLERK



Aqua Utilities Florida, Inc.
2228 Capital Circle NE, Ste. 2A
Tallahassee, FL 32308

Ms. Beth Salak
Director of Regulatory Compliance
Florida Public Service Commission
2540 Shumard Oak Blvd.
Tallahassee, FL 32399-0850

Re: Docket No. 080121-WS – Application for an increase in water and wastewater rates by Aqua Utilities Florida, Inc. (“Aqua”)

Dear Ms. Salak,

During the six month monitoring period of customer issues for Aqua, we have responded to approximately 20 follow up questions from staff related to our Issues Logs. Now that we have concluded the six month monitoring period, I would like to take this opportunity to first thank your staff for their thorough, objective, and professional analysis of the reported concerns.

I believe it is important to offer the following supplemental information concerning customers’ allegations surrounding supervisor call backs. First, Aqua has reviewed each issue reported in each six month report to identify requests for either a supervisor contact or call back. There were approximately 61 customers who requested either to speak with a supervisor or a call back from a supervisor. In each and every incident, the customer was either connected directly with a supervisor or did receive a call back from one of the customer service supervisors. Also, in each incident, the customers’ concerns were addressed and resolved.

Secondly, Aqua implemented a Call Escalation Process to be followed by all Aqua call centers. This process was developed in April, 2009 and was reviewed with all CSR Supervisors and Compliance Team. This escalation process was then communicated to all CSRS in each of the three call centers.

Also, a detailed Supervisor Audit was developed, whereby the Training Team pulls **all** supervisor callbacks from all three call centers. These are placed in an internal folder on the internal Aqua network and are then reviewed by all management in these call centers. This is used to provide coaching and feedback to the CSRs to assist in future calls to provide a one call resolution. This effective training tool is used to reduce the amount of customer call backs.

Finally, a Complaint Analysis and Remediation Team (CART) has been developed and initiated which consists of all call center supervisors and their managers, as well as the Supervisor of Compliance. This CART then addresses all executive escalations. The CART team meets on a bi-weekly basis to review all accounts that have been identified where further coaching and training issues are identified for follow-ups.

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Letter – Beth Salak
November 24, 2009

Aqua believes that these processes have been extremely effective in addressing customer concerns. We are confident that customers' issues have thoroughly been addressed and these internal quality assurance procedures have provided an additional level of service to our customers.

If you have any questions, please do not hesitate to contact me at (850) 575-8500.

Sincerely,

A handwritten signature in cursive script that reads "Troy Rendell". The signature is written in dark ink and is positioned above the printed name and title.

Troy Rendell
Manager of Rates

Cc: Bruce May, Esq., Holland & Knight
Chris Franklin, Regional President, Aqua America, Inc.
Kimberly Joyce, Esq., Aqua America, Inc.
Jack Lihvarcik, COE, Aqua Utilities Florida, Inc.

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STATE OF FLORIDA



DIVISION OF REGULATORY COMPLIANCE
BETH W. SALAK
DIRECTOR
(850) 413-6600

Public Service Commission

October 1, 2009

Kimberly A. Joyce
Manager of Regulatory Affairs,
Aqua Utilities Florida, Inc.
762 W. Lancaster Avenue
Bryn Mawr, PA 19010

Re: Aqua Utilities Florida, Inc., Data Request

Dear Ms. Joyce:

Thank you for the invitation to have staff of the Florida Public Service (PSC) visit Aqua Utilities Florida, Inc.'s call center in Carey, North Carolina. While such a visit is not necessary at this time, circumstances may determine that such a visit will have value at a future date and should this occur, I will be happy to contact you to make appropriate arrangements.

It would, however, expedite staff's review of Aqua Utilities Florida, Inc.'s customer service procedures if you could provide any and all information available in response to the attached data request. If any of the questions in the data request are not clear or require elaboration to enable Aqua Utilities Florida, Inc. to provide the most accurate information sought, please contact Kevin Bloom (850) 413-6526. Please provide a response by November 3, 2009. Thank you in advance for your cooperation.

Sincerely,

Beth Salak
Director
Division of Regulatory Compliance

Cc: Tim Devlin
Marshall Willis
Laura King
Troy Rendell

1. Please identify the call centers that serve customers of Aqua Utilities Florida, Inc.

For those call centers that serve customers of Aqua Utilities Florida, Inc., please provide the following information:

1. Number of call center customer service representatives by month for the calendar years 2006 to 2009.
2. Number of incoming Florida calls received daily, monthly and annually for the years 2006 to 2009.
3. List of all performance measures used by the company to evaluate the call center's overall performance.
4. Goals for all performance measures used by the call center to evaluate center performance.
5. Please provide any other goals established by the company pertaining to the handling of customer complaints.
6. Please provide for each month for 2008 and 2009 to date:
 - a. Average handling time
 - b. Average talk time
 - c. Call abandonment rate
 - d. Call hold time
 - e. Average speed of answer for customers in queue
 - f. Longest delay in queue
 - g. Call back rates
7. Please provide a description of your customer service representative observation program and all evaluation forms used.
8. Please provide a description of all training programs provided to customer service representatives and provide a copy of all training materials.
9. Please provide all customer service policies and procedures, handbooks or job-aids.
10. List and describe all improvements the company has made in the past 6 months to improve customer service.
11. Please indicate whether call center employees are employees of Aqua Utilities Florida, Inc., or its parent company. If not, please identify the employer(s).
12. Please describe how Aqua Utilities Florida, Inc. determines how, when and under what circumstances customers requesting a call back actually receive further contact from the company.

**AUF Response to Staff Requests
November 3, 2009**

1. Please identify the call centers that service customers of Aqua Utilities Florida, Inc.

Aqua has three call centers located in Cary, North Carolina, Bryn Mawr, Pennsylvania, and Kankakee, Illinois.

2. Number of call center customer representatives by month for the calendar years 2006 to 2009.

Please see attached Schedule 1. Prior to switching to the three call centers, AUF had five customer service representatives.

3. Number of incoming Florida calls received daily, monthly and annually for the years 2006 to 2009.

Please see attached Schedule 2. Please note this report includes all Florida calls to the call center which would include, for example, general inquiries and questions, move-in/move outs, and non-jurisdictional county customers.

4. List of all performance measures used by the company to evaluate the call center's overall performance.

Please see Schedule 1 for performance measures.

5. Goals for all performance measures used by the call center to evaluate center performance.

Please see Schedule 1 for goals.

6. Please provide any other goals established by the company pertaining to the handling of customer complaints.

In addition to the goals designated above, Aqua has a quality monitoring program for its customer service representatives. The goal for quality monitoring scores is 85%. This program is more fully explained in the documents provided for question 7.

7. Please provide for each month for 2008 and 2009 to date:

- a. **Average handling time** - Please see Schedule 1
- b. **Average talk time** - AUF does not track separately, but is subsumed in (a).
- c. **Call abandonment rate** - Please see Schedule 1.
- d. **Call hold time** - AUF does not track separately, but is subsumed in (a).

- e. **Average speed of answer for customers in queue** – Please see Schedule 1.
 - f. **Longest delay in queue** – AUF does not track the longest delay in queue.
 - g. **Call back rates** – AUF does not track repeat calls.
- 8. Please provide a description of your customer service representative observation program and all evaluation forms used.**

Please see attached document labeled CSR evaluation standard operating procedures and evaluation form.

- 9. Please provide a description of all training programs provided customer service representatives and provide a copy of all training materials.**

Please see disc that will be hand delivered to Beth Salak.

- 10. Please provide all customer service policies and procedures, handbooks or job-aids.**

Please see disc that will be hand delivered to Beth Salak.

- 11. List and describe all improvements the company has made in the past 6 months to improve customer service.**

Aqua is committed to quality customer service for its water and wastewater service and continued improvement is an ongoing. In the past six months, Aqua has continued to focus on ways to improve customer service for its customers, both from an operational perspective and at its main source of contact with our customers through the call center.

Aqua is near completion of an audit of all its replaced meters in Florida. AUF underwent a massive meter change out in order to replace old meters and there were some transitional issues that occurred with this change. AUF has audited nearly every meter replaced to ensure that the meter is coded properly to its billing system. In addition, Aqua has implemented improvements to its service order processing system. A more standardized approach was implemented for the field techs for the various service orders which Aqua receives. This change was implemented to improve upon the communication between the field techs and call centers. As a result of the monitoring program, Aqua has also improved upon the tracking of customer on-site meter and bench test procedures since we found this to be a common request reviewing the data after the rates from the last rate case were made effective.

AUF also recently mailed out an informational brochure to remind customers about contacting the call center when they leave or return to their Florida home. Many of our customers use their Florida home as second residence and we designed a mailer to encourage customers to contact the call center when they leave for the summer so that their account is properly noted.

The call center has further formed a new complaint analysis and remediation team. This new process captures a sampling of complaints that are reviewed and discussed. Training opportunities are discussed for particular customer service representatives or if needed, on a broader basis. The call center metrics for 2009 are in line with AUF's goals for abandon rate, calls answered in less than 90 seconds, and average speed to answer. The call center also reviewed its interactive voice response in the last six months, which is its system that handles phone calls coming into the call center. Some improvement includes more access to self service and reordering the emergency option to the beginning of the message.

12. Please indicate whether call center employees are employees of Aqua Utilities Florida, Inc., or its parent company. If not, please identify the employer(s).

Call center employees are employees of Aqua Services, Inc.

13. Please describe how Aqua Utilities Florida, Inc. determines how, when and under what circumstances customers requesting a call back actually receive further contact from the company.

If a customer requests a supervisor, the customer service representative will attempt to answer the question on her or his own first. However, if a customer wishes to speak to a supervisor and a supervisor is available, the customer is transferred. If a supervisor is not available, the customer is informed that a supervisor will call the customer back. Call backs are tracked using Electronic Work Queue (EWQ) that is worked daily and reviewed by call center management on a weekly basis.

Schedule 1A

Call Center Statistics	January-07	February-07	March-07	April-07	May-07	June-07	July-07	August-07	September-07	October-07	November-07	December-07	Standard / Goal
States	PA(SE), NC, VA, TX, FL	PA (SE), NC, VA, TX, FL, NJ	PA (all), NC, VA, TX, FL, NJ	PA (all), NC, VA, TX, FL, NJ	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	PA, NC, VA, TX, FL, OH, NJ, IL, MO, IN*	
Customers (approx.)	704,150	704,150	704,150	801,196	801,196	801,196	837,583	837,583	837,583	849,027	849,027	849,027	
Total Calls	83,268	70,355	83,059	86,804	99,347	105,624	112,732	124,801	91,560	107,387	97,687	80,436	
Days Open	21	20	22	21	22	21	21	23	19	23	21	20	
Average Calls/Day	3,965	3,518	3,775	4,134	4,516	5,030	5,368	5,426	4,819	4,669	4,652	4,022	
Abandon Rate	15.5%	7.8%	5.4%	8.3%	14.5%	16.0%	15.7%	15.8%	7.6%	3.9%	5.2%	2.4%	< 5%
Calls Answered in < 90 seconds	52%	66%	73%	62%	40%	38%	41%	38%	63%	78%	71%	86%	> 80%
Average Speed to Answer	131 sec	82 sec	65 sec	92 sec	175 sec	181 sec	183 sec	192 sec	111 sec	58 sec	77 sec	37 sec	< 60 sec
Average Handle Time	3:44	4:11	4:06	4:14	4:35	4:38	4:38	4:49	4:38	4:30	4:23	4:14	< 4:00
Calls/Customer/Yr	1.6	1.2	1.3	1.3	1.4	1.6	1.6	1.6	1.4	1.4	1.4	1.2	> 1.0
Average #CSR/Day	42.6	49.0	52.2	53.4	54.2	55.2	59.7	62.1	66.2	67.6	67.2	64.8	
Calls Answered	70,361	64,867	78,574	79,599	84,942	88,724	95,033	105,082	84,601	103,199	92,607	78,506	

Call Center Statistics	January-08	February-08	March-08	April-08	May-08	June-08	July-08	August-08	September-08	October-08	November-08	December-08	Standard / Goal
States	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	PACR, VA, TX, FL, HI, NJ, IL, MO, IN*	
Customers (approx.)	849,027	849,027	849,027	849,027	849,027	849,027	849,027	849,027	849,027	849,027	849,027	849,027	
Total Calls	99,038	87,519	88,651	92,067	88,257	88,535	90,062	84,003	95,298	95,839	78,517	84,082	
Days Open	22	21	21	22	21	21	22	21	21	23	19	22	
Average Calls/Day	4,502	4,168	4,221	4,185	4,203	4,216	4,094	4,000	4,538	4,167	4,132	3,822	
Abandon Rate	3.4%	5.4%	9.1%	8.2%	13.6%	7.2%	4.3%	5.9%	9.2%	4.7%	3.2%	3.0%	
Calls Answered in < 90 seconds	81%	72%	56%	57%	42%	63%	71%	64%	52%	75%	83%	84%	
Average Speed to Answer	51 sec	77 sec	130 sec	120 sec	200 sec	112 sec	71 sec	93 sec	135 sec	57 sec	40 sec	31 sec	
Average Handle Time	4:01	4:05	4:35	4:54	5:03	5:06	4:55	5:03	5:07	4:55	4:46	4:36	
Calls/Customer/Yr	1.3	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.3	1.2	1.2	1.1	
Average #CSR/Day	62.8	56.3	55.4	58.5	58.3	62.3	61.6	61.0	64.9	66.2	68.0	68.2	
Calls Answered	95,671	82,793	80,584	84,518	76,254	82,160	86,189	79,047	86,531	91,335	76,004	81,560	

Call Center Statistics	January-09	February-09	March-09	April-09	May-09	June-09	July-09	August-09	September-09	Standard / Goal
States	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	PACR, VA, TX, FL, HI, IL, MO, IN*	
Customers (approx.)	851,308	851,308	851,308	851,308	855,552	855,552	858,041	858,041	858,041	
Total Calls	90,650	76,495	81,283	82,769	81,223	92,569	93,052	89,990	90,922	
Days Open	21	20	22	22	20	22	22	21	21	
Average Calls/Day	4,317	3,825	3,695	3,762	4,061	4,208	4,230	4,285	4,330	
Abandon Rate	3.6%	1.3%	1.2%	1.8%	3.4%	4.8%	4.3%	2.5%	4.3%	< 5%
Calls Answered in < 90 seconds	81%	94%	95%	93%	84%	79%	80%	89%	79%	> 80%
Average Speed to Answer	47 sec	16 sec	13 sec	19 sec	37 sec	55 sec	47 sec	27 sec	46 sec	< 60 sec
Average Handle Time	4:38	4:31	4:32	4:24	4:40	4:41	4:43	4:45	4:50	< 4:30
Calls/Customer/Yr	1.3	1.1	1.1	1.1	1.2	1.2	1.2	1.2	1.3	> 1.0
Average #CSR/Day	65.4	67.5	68.5	65.8	64.8	65.3	65.3	66.2	64.3	
Calls Answered	87,387	75,501	80,308	81,279	78,461	88,126	89,051	87,740	87,012	

Aqua Call Center Metrics

Year	Month	Abandon Call Rate	Answer Speed Service Level	Average Speed to Answer	Average Handle Time
2006	January	3.6	86%	40	3:24
2006	February	3.8	83%	41	3:41
2006	March	1.6	93%	20	3:41
2006	April	2.2	89%	27	3:53
2006	May	1.7	91%	24	3:39
2006	June	2.0	89%	25	3:34
2006	July	7.0	70%	73	4:03
2006	August	3.3	84%	39	3:57
2006	September	4.4	81%	46	4:06
2006	October	3.1	85%	36	3:45
2006	November	6.0	77%	58	3:39
2006	December	8.5	72%	63	3:37

Schedule 2

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2007	Quarter 1	January	2	381	381
			3	331	331
			4	492	492
			5	535	535
			8	638	638
			9	619	619
			10	348	348
			11	244	244
			12	203	203
			15	251	251
			16	236	236
			17	361	361
			18	273	273
			19	201	201
			22	375	375
			23	403	403
			24	255	255
			25	170	170
			26	164	164
			29	506	506
			30	299	299
January Total				7285	7285

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2007	Quarter 1	February	1	175	175			
			2	181	181			
			5	351	351			
			6	340	340			
			7	351	351			
			8	240	240			
			9	171	171			
			12	189	189			
			13	261	261			
			14	151	151			
			15	194	194			
			16	164	164			
			19	129	129			
			20	268	268			
			21	224	224			
			22	137	137			
			23	141	141			
			26	301	301			
			27	210	210			
			28	156	156			
			February Total				4334	4334

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2007	Quarter 1	March	1	124	124			
			2	160	160			
			5	342	342			
			6	282	282			
			7	205	205			
			8	249	249			
			9	230	230			
			12	242	242			
			13	206	206			
			14	153	153			
			15	142	142			
			16	172	172			
			19	228	228			
			20	150	150			
			21	145	145			
			22	121	121			
			23	363	363			
			26	293	293			
			27	260	260			
			28	132	132			
			29	155	155			
			30	155	155			
			March Total				4509	4509
			Quarter 1 Total				16128	16128

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2007	Quarter 2	April	2	238	238
			3	245	245
			4	159	159
			5	199	199
			6	163	163
			9	194	194
			10	199	199
			11	202	202
			12	158	158
			13	147	147
			16	211	211
			17	175	175
			18	147	147
			19	157	157
			20	155	155
			23	230	230
			24	197	197
			25	134	134
			26	164	164
			27	155	155
					30
		April Total		3925	3925

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2007	Quarter 2	May	1	230	230
			2	220	220
			3	220	220
			4	213	213
			7	376	376
			8	367	367
			9	315	315
			10	166	166
			11	204	204
			14	241	241
			15	249	249
			16	251	251
			17	207	207
			18	204	204
			21	283	283
			22	267	267
			23	212	212
			24	219	219
			25	205	205
			29	294	294
			30	263	263
31	217	217			
May Total				5423	5423

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2007	Quarter 2	June	1	241	241			
			4	344	344			
			5	361	361			
			6	309	309			
			7	381	381			
			8	292	292			
			11	389	389			
			12	280	280			
			13	205	205			
			14	257	257			
			15	221	221			
			18	314	314			
			19	233	233			
			20	193	193			
			21	235	235			
			22	195	195			
			25	339	339			
			26	298	298			
			27	243	243			
			28	236	236			
			29	195	195			
			June Total				5761	5761
			Quarter 2 Total				15109	15109

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2007	Quarter 3	July	2	330	330
			3	246	246
			5	367	367
			6	175	175
			9	441	441
			10	427	427
			11	304	304
			12	212	212
			13	198	198
			16	235	235
			17	226	226
			18	160	160
			19	176	176
			20	163	163
			23	265	265
			24	583	583
			25	217	217
			26	182	182
			27	262	262
					30
		31	214	214	
		July Total		5656	5656

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2007	Quarter 3	August	1	204	204			
			2	299	299			
			3	214	214			
			6	306	306			
			7	392	392			
			8	382	382			
			9	198	198			
			10	221	221			
			13	388	388			
			14	497	497			
			15	305	305			
			16	238	238			
			17	214	214			
			20	269	269			
			21	252	252			
			22	257	257			
			23	208	208			
			24	197	197			
			27	310	310			
			28	211	211			
			29	206	206			
			30	235	235			
			31	212	212			
			August Total				6215	6215

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2007	Quarter 3	September	4	348	348			
			5	290	290			
			6	183	183			
			7	201	201			
			10	319	319			
			11	333	333			
			12	204	204			
			13	171	171			
			14	181	181			
			17	246	246			
			18	185	185			
			19	149	149			
			20	165	165			
			21	129	129			
			24	280	280			
			25	239	239			
			26	152	152			
			27	208	208			
			28	200	200			
			September Total				4183	4183
			Quarter 3 Total				16054	16054

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2007	Quarter 4	October	1	333	333
			2	336	336
			3	294	294
			4	238	238
			5	209	209
			8	236	236
			9	232	232
			10	184	184
			11	182	182
			12	257	257
			15	345	345
			16	278	278
			17	181	181
			18	127	127
			19	175	175
			22	273	273
			23	159	159
			24	150	150
			25	177	177
			26	169	169
			29	189	189
30	147	147			
31	106	106			
October Total				4977	4977

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2007	Quarter 4	November	1	145	145
			2	125	125
			5	217	217
			6	169	169
			7	159	159
			8	129	129
			9	283	283
			12	219	219
			13	287	287
			14	236	236
			15	178	178
			16	170	170
			19	203	203
			20	164	164
			21	109	109
			23	60	60
			26	364	364
			27	272	272
			28	282	282
			29	213	213
			30	235	235
November Total				4219	4219

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2007	Quarter 4	December	3	324	324			
			4	233	233			
			5	172	172			
			6	186	186			
			7	186	186			
			10	217	217			
			11	165	165			
			12	147	147			
			13	136	136			
			14	163	163			
			17	190	190			
			18	186	186			
			19	200	200			
			20	89	89			
			21	117	117			
			24	53	53			
			26	127	127			
			27	99	99			
			28	131	131			
			31	143	143			
			December Total				3264	3264
			Quarter 4 Total				12460	12460
			2007 Total				59751	59751

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2008	Quarter 1	January	2	275	275
			3	285	285
			4	234	234
			7	346	346
			8	246	246
			9	198	198
			10	180	180
			11	154	154
			14	239	239
			15	150	150
			16	139	139
			17	150	150
			18	142	142
			21	156	156
			22	177	177
			23	120	120
			24	138	138
			25	224	224
			28	356	356
			29	221	221
			30	173	173
31	184	184			
January Total				4487	4487

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 1	February	1	229	229			
			4	249	249			
			5	212	212			
			6	203	203			
			7	173	173			
			8	200	200			
			11	256	256			
			12	260	260			
			13	214	214			
			14	201	201			
			15	232	232			
			18	146	146			
			19	198	198			
			20	220	220			
			21	165	165			
			22	192	192			
			25	250	250			
			26	229	229			
			27	206	206			
			28	170	170			
			29	154	154			
			February Total				4359	4359

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2008	Quarter 1	March	3	299	299
			4	192	192
			5	226	226
			6	214	214
			7	169	169
			10	227	227
			11	218	218
			12	155	155
			13	120	120
			14	136	136
			17	226	226
			18	221	221
			19	170	170
			20	135	135
			21	142	142
			24	250	250
			25	246	246
			26	217	217
			27	232	232
			28	198	198
					31
		March Total		4338	4338
	Quarter 1 Total			13184	13184

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 2	April	1	218	218			
			2	218	218			
			3	238	238			
			4	235	235			
			7	242	242			
			8	147	147			
			9	165	165			
			10	208	208			
			11	141	141			
			14	251	251			
			15	193	193			
			16	171	171			
			17	122	122			
			18	182	182			
			21	292	292			
			22	196	196			
			23	171	171			
			24	166	166			
			25	212	212			
			28	348	348			
			29	242	242			
			30	212	212			
			April Total				4570	4570

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2008	Quarter 2	May	1	211	211
			2	186	186
			5	257	257
			6	136	136
			7	137	137
			8	125	125
			9	172	172
			12	233	233
			13	198	198
			14	166	166
			15	164	164
			16	159	159
			19	226	226
			20	163	163
			21	149	149
			22	189	189
			23	178	178
			27	253	253
			28	256	256
			29	267	267
			30	223	223
May Total				4048	4048

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 2	June	2	324	324			
			3	306	306			
			4	239	239			
			5	134	134			
			6	124	124			
			9	194	194			
			10	166	166			
			11	178	178			
			12	146	146			
			13	154	154			
			16	215	215			
			17	216	216			
			18	163	163			
			19	162	162			
			20	160	160			
			23	234	234			
			24	180	180			
			25	150	150			
			26	176	176			
			27	190	190			
			30	197	197			
			June Total				4008	4008
			Quarter 2 Total				12626	12626

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2008	Quarter 3	July	1	204	204
			2	151	151
			3	175	175
			7	234	234
			8	178	178
			9	179	179
			10	159	159
			11	129	129
			14	173	173
			15	127	127
			16	165	165
			17	166	166
			18	158	158
			21	270	270
			22	214	214
			23	180	180
			24	181	181
			25	180	180
			28	243	243
			29	257	257
30	173	173			
31	172	172			
July Total				4068	4068

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 3	August	1	169	169			
			4	239	239			
			5	230	230			
			6	138	138			
			7	193	193			
			8	161	161			
			11	151	151			
			12	132	132			
			13	133	133			
			14	170	170			
			15	187	187			
			18	158	158			
			19	143	143			
			20	153	153			
			21	166	166			
			22	170	170			
			25	267	267			
			26	202	202			
			27	191	191			
			28	163	163			
			29	216	216			
			August Total				3732	3732

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 3	September	2	276	276			
			3	219	219			
			4	230	230			
			5	172	172			
			8	188	188			
			9	173	173			
			10	147	147			
			11	135	135			
			12	167	167			
			15	227	227			
			16	169	169			
			17	149	149			
			18	161	161			
			19	154	154			
			22	283	283			
			23	204	204			
			24	164	164			
			25	146	146			
			26	172	172			
			29	192	192			
			30	188	188			
			September Total				3916	3916
			Quarter 3 Total				11716	11716

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 4	October	1	184	184			
			2	279	279			
			3	245	245			
			6	293	293			
			7	188	188			
			8	157	157			
			9	170	170			
			10	197	197			
			13	189	189			
			14	158	158			
			15	148	148			
			16	174	174			
			17	129	129			
			20	258	258			
			21	133	133			
			22	155	155			
			23	175	175			
			24	221	221			
			27	282	282			
			28	242	242			
			29	233	233			
			30	202	202			
			31	203	203			
			October Total				4615	4615

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2008	Quarter 4	November	3	296	296
			4	171	171
			5	161	161
			6	152	152
			7	163	163
			10	237	237
			11	148	148
			12	144	144
			13	189	189
			14	199	199
			17	246	246
			18	213	213
			19	196	196
			20	186	186
			21	262	262
			24	277	277
			25	185	185
			26	134	134
			28	63	63
			November Total		

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2008	Quarter 4	December	1	383	383			
			2	289	289			
			3	181	181			
			4	171	171			
			5	206	206			
			8	202	202			
			9	167	167			
			10	137	137			
			11	155	155			
			12	128	128			
			15	153	153			
			16	150	150			
			17	154	154			
			18	149	149			
			19	217	217			
			22	242	242			
			23	150	150			
			24	153	153			
			26	130	130			
			29	327	327			
			30	228	228			
			31	159	159			
					December Total		4231	4231
				Quarter 4 Total			12468	12468
			2008 Total				49994	49994

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2009	Quarter 1	January	2	179	179
			5	247	247
			6	216	216
			7	173	173
			8	142	142
			9	158	158
			12	228	228
			13	156	156
			14	163	163
			15	210	210
			16	245	245
			19	144	144
			20	240	240
			21	344	344
			22	250	250
			23	207	207
			26	311	311
			27	255	255
			28	151	151
			29	179	179
			30	229	229
January Total				4427	4427

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 1	February	2	238	238			
			3	234	234			
			4	168	168			
			5	162	162			
			6	194	194			
			9	181	181			
			10	144	144			
			11	144	144			
			12	115	115			
			13	154	154			
			16	145	145			
			17	193	193			
			18	200	200			
			19	133	133			
			20	187	187			
			23	250	250			
			24	233	233			
			25	253	253			
			26	212	212			
			27	215	215			
			February Total				3755	3755

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 1	March	2	216	216			
			3	229	229			
			4	169	169			
			5	157	157			
			6	137	137			
			9	189	189			
			10	123	123			
			11	125	125			
			12	152	152			
			13	128	128			
			16	273	273			
			17	215	215			
			18	170	170			
			19	148	148			
			20	145	145			
			23	251	251			
			24	189	189			
			25	173	173			
			26	200	200			
			27	189	189			
			30	265	265			
			31	212	212			
			March Total				4055	4055
			Quarter 1 Total				12237	12237

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 2	April	1	189	189			
			2	168	168			
			3	197	197			
			6	287	287			
			7	177	177			
			8	194	194			
			9	161	161			
			10	141	141			
			13	203	203			
			14	156	156			
			15	145	145			
			16	158	158			
			17	178	178			
			20	401	401			
			21	275	275			
			22	198	198			
			23	226	226			
			24	219	219			
			27	283	283			
			28	274	274			
			29	229	229			
			30	205	205			
			April Total				4664	4664

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State	
Year	Quarter	Month	Day	FL	Grand Total
2009	Quarter 2	May	1	187	187
			4	267	267
			5	218	218
			6	184	184
			7	139	139
			8	307	307
			11	214	214
			12	187	187
			13	171	171
			14	223	223
			15	198	198
			18	438	438
			19	280	280
			20	263	263
			21	237	237
			22	266	266
			26	390	390
			27	231	231
			28	236	236
			29	237	237
May Total				4873	4873

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 2	June	1	373	373			
			2	213	213			
			3	187	187			
			4	188	188			
			5	178	178			
			8	175	175			
			9	159	159			
			10	167	167			
			11	113	113			
			12	257	257			
			15	338	338			
			16	210	210			
			17	150	150			
			18	203	203			
			19	265	265			
			22	358	358			
			23	303	303			
			24	229	229			
			25	212	212			
			26	248	248			
			29	281	281			
			30	221	221			
			June Total				5028	5028
			Quarter 2 Total				14565	14565

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 3	July	1	177	177			
			2	178	178			
			6	227	227			
			7	154	154			
			8	169	169			
			9	110	110			
			10	145	145			
			13	290	290			
			14	241	241			
			15	177	177			
			16	181	181			
			17	202	202			
			20	335	335			
			21	250	250			
			22	222	222			
			23	221	221			
			24	271	271			
			27	443	443			
			28	234	234			
			29	202	202			
			30	212	212			
			31	191	191			
			July Total				4832	4832

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 3	August	3	298	298			
			4	190	190			
			5	162	162			
			6	181	181			
			7	175	175			
			10	225	225			
			11	134	134			
			12	168	168			
			13	187	187			
			14	228	228			
			17	312	312			
			18	319	319			
			19	201	201			
			20	200	200			
			21	226	226			
			24	379	379			
			25	347	347			
			26	241	241			
			27	247	247			
			28	258	258			
			31	305	305			
			August Total				4983	4983

Florida Calls 2007-2009

Note: includes self-serve, after-hours and weekend calls

Fct Call Volume				Dim State				
Year	Quarter	Month	Day	FL	Grand Total			
2009	Quarter 3	September	1	293	293			
			2	218	218			
			3	174	174			
			4	163	163			
			8	256	256			
			9	175	175			
			10	165	165			
			11	165	165			
			14	246	246			
			15	184	184			
			16	147	147			
			17	185	185			
			18	224	224			
			21	392	392			
			22	277	277			
			23	256	256			
			24	270	270			
			25	299	299			
			28	353	353			
			29	265	265			
			30	274	274			
			September Total				4981	4981
			Quarter 3 Total				14796	14796
			2009 Total				41598	41598

CSR Evaluation SOPs

I. Expectations:

- A. No less than 10 Evaluations per rep per month
 - 1. 5 evaluations completed by midpoint – 15th of each month

II. Criteria:

- A. 3 Short calls – less than 3 minutes but no less than 2 minutes
- B. 3 Calls – 3 to 5 minutes
- C. 4 Calls – greater than 5 minutes
 - 1. 1 call – “QA Your Way” (Beginning in October)
 - a. **The rep will email the date, time, and premise number of one call that they would like to have evaluated by the QT Team.**
 - b. Information will be sent to “QA Team” email address in Outlook.
 - c. Due by 23rd of each month.
 - d. QT Team will monitor mailbox daily and complete evaluations on request from CSRs.
 - e. These evaluations will be reviewed with the CSR during monthly coaching sessions.
 - a. Goal is to increase calibration levels for CSRs, Supervisors, QT Team, and Managers.

III. Reporting:

A. CSR Reports

1. Supervisor CSR scores – report will be run and delivered to each supervisor and manager's NICE My Universe area (Scheduled Reports area)
 - a. Reports run on Thursdays at 7 am
 - b. Excel spreadsheet will be created monthly including summary and detailed data per supervisor team and each CSR.
 - (1) Completed and delivered to immediate supervisor and manager no later than the 5th of each month.
 - c. Midpoint grades will be available for supervisor review as of the 16th of each month.

IV. Coaching

1. Coaching Packages

a) Completed and delivered to immediate supervisor and manager's NICE My Universe area no later than the 5th of each month.

2. Coaching Sessions

a) Completed and delivered to CSR no later than the 15th of each month.

V. Communication

A. If at any point, these SOPs will not be met by the QT Team or Call Center Management team(s), a communication will be sent to the respective management team advising them of the situation and an updated expected date.

VI. Appeal Process

A. If CSR wishes to dispute question(s) on their evaluation, their immediate supervisor should review the disputed question(s) to determine if the dispute is valid.

B. If the dispute is valid, the supervisor should document the point in the attached form and submit to the QT Team director for review.

C. Appeals must be submitted same month. Decision(s) will be returned within ten business days of the request.



Quality Assurance and Training Team

Call Evaluation Appeal Form

Associate: _____

Supervisor: _____

Month: _____

Attachment # on Coaching Package: _____

Date and Time of evaluated call: _____

Question appealed:

Reason for appeal (Include any supporting documentation):

Appeal approved / Score no change Appeal denied / Score changed from ____/ to ____

Reason:

If multiple appeals, complete additional forms.

*3.f. Proper creation of EWQ task?

NA

*3.g. Used hold process appropriately?

NA

*3.h. Warm transfer of call?

NA

4. Comments

N/A

Comment

Premise 634882

Good call...