

The Beginning



Begin your Contact by Asking:

- Can I have your first and last name?
- Can I get your email address and/or phone number?
- How can I help you today?



Collect Additional Information

- What's the customer's OS?
- What's the Quicken version/release number?
- What FI is experiencing the issue? Is there an error code?



Identify the Issue

- Restate what the customer's issue is to confirm your understanding
- Create your case and select the appropriate case reasons

The Middle



Review Salesforce Alerts

- Known issues and additional troubleshooting steps are listed in the Alerts



Search for FAQs!

- Make sure to sign into the Knowledgebase before searching for FAQs (quicken.com/quicken-login)
- Use your FAQs on each contact – don't assume you know the steps!
- Make sure to follow all the steps listed, in the order they are listed



Recap the Issue

- Provide the customer with a brief summary of the contact including steps taken
- Make sure the customer has clear expectations if further follow-up is required (e.g. the escalation timeframe)

The End



Self-Serve Options: Educate the customer on the tools available to them!

- In-product help
- Quicken Community (getsatisfaction.com/quickencommunity)
- Quicken.com knowledgebase



Additional Questions/Concerns

- Is the customer's issue resolved?
- If applicable, does the customer understand the next steps?
- Did we address all the issues the customer contacted about?



Wrap-up Documentation

- Situation – what was the reason the customer contacted?
- Action – what action did you take? Make sure to include specific steps taken and the results of those steps
- Resolution – was the customer's issue resolved? If not, what are the next steps?