

The following materials from Mega Life and Health in North Richmond Hills, TX, are internal documents pertaining to the company's incentive and career development programs for customer service reps. They include:

- Calls and production guidelines for reps.
- An outline and brief descriptions of the various incentive programs for which reps are eligible at Mega Life and Health.
- Career path requirements for promotion from Level I to Level II rep.
- Career path requirements for promotion from Level II to Level III rep.

— Editor  
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www.CustomerServiceGroup.com

## Calls & Production Guidelines

The Customer Care Center measures production standards for each person in the department. They are as follows:

### **Production Minimums\***

CMA and UGA Phone Reps – 77 calls per day

UGA and CMA Change Reps– 50 production items (in IMAGING) per day

These production minimums will be published daily and will be calculated on a weekly average.

Bonuses are calculated on the daily figures. For instance, in the example below the rep would have qualified for their bonus on Monday, Tuesday, and Thursday.

The weekly average is a management tool to gauge overall associate effectiveness.

**EXAMPLE** – If you are a phone rep and you take these calls:

M	90	Qualified for bonus
T	77	Qualified for bonus
W	72	
TH	77	Qualified for bonus
F	72	

Average 77 calls per day. You will have met your avg. call volume for the week.

**\* Subject to review and adjustment based on departmental volumes.**

Each person should take the necessary steps to get themselves in the right place to meet their production minimums.

### **Quality Audit Standard**

Must maintain an audit average of 95% or higher.

# Customer Care Center Incentive Programs

## Perfect Attendance

### Qualification

During a given Calendar Month

- No tardies &
- No missed days due to Sick Days (preplanned Personal and preplanned Vacation okay)

### Benefit

- Free Movie Tickets (with 2 sm. sodas and a med. popcorn included)
- Chance for \$100 cash drawing
- Special recognition party (usually 15 to 30 minutes long on a Friday)
- Totally Associate Controlled
- 6 month perfect attendance additionally receives \$25 and 1 hour off coupon
- 12 month perfect attendance additionally receives \$50 and \_ day off coupon

## Career Development Program

### Qualification

- Meet predetermined, published criteria (see Career Path Documents) &
- Pass Test

### Benefit

- Promotion
- Increase in Salary (8%)
- Totally Associate Controlled

## Production Incentive Program

### Qualification

- Meet or exceed their **daily** production minimums &
- Maintain a **weekly** quality review average of 95% or higher &
- Have no verbal or written warnings\*\* &
- Are not absent on Monday **or** Tuesday (must be present for **both**) of that week.  
\*\*Associate would not be eligible for bonus until the warning period has ended

### Benefit

- An extra \$1 per hour per day\*  
\*Not paid on OT hours and there will be no pro-rating for partially worked days

## Top Producer Program

### Qualification

- Highest production volume for that Quarter.
- Must have scored 95% or higher for the entire Quarter for quality review.
- Must have no Monday/Tuesday absences (other than preplanned vacation).
- Must have met production minimums for 95% of the Quarter.

### Benefit

- 2 day (or greater) paid field visit trip to a major U.S. city.
- Totally Associate Controlled

## MEGA Bucks

### Qualification

- Outstanding assistance to a fellow worker. (Must be approved by a supervisor)

### Benefit

- A MEGA Buck coupon can be redeemed for gift certificates or restaurant coupons.

## **Customer Care Center Incentive Programs** *(continued)*

### **Duck Bucks**

#### Qualification

- Must maintain a monthly quality score of 95% or higher.

#### Benefit

- Redeemable for:

1 = Free drink and snack from the vending machine

2 = 15 minute tardy (one occurrence)

3 = 30 minutes extra at lunch\*

4 = Leave 30 minutes early\* or a free cafeteria lunch

5 = Leave 30 minutes early\* or a free cafeteria breakfast

6 = 1 hour off coupon\* and a free vending drink and snack OR a free lunch or breakfast from the cafeteria

7 = \_ day off\* or a coupon for a restaurant

8 = \_ day off\* and a coupon for a restaurant

\*Must be approved by supervisor

- If 100% is maintained for 3 consecutive months — \$50 cash will be awarded.
- Totally Associate Controlled

## Customer Care Center Career Path

<b><u>Time Required In Current Position:</u></b>	6 Months
<b><u>Current Position Title:</u></b>	Telephone Representative I
<b><u>Promotion Position Title:</u></b>	Telephone Representative II
<b><u>Division/Dept.:</u></b>	Customer Service
<b><u>Career Path Requirements:</u></b>	Quality Score Production Score Attendance/Punctuality Testing Knowledge
<b><u>Quality Scoring:</u></b>	Must maintain an average score of 95 for 95% of the last six months in current position.
<b><u>Production Scoring:</u></b>	Must maintain minimum production requirements for 90% of time in current position.
<b><u>Attendance/Punctuality:</u></b>	Must comply with departmental attendance and punctuality standards.
<b><u>Testing Requirements:</u></b>	Must be proficient in the following areas: Bank Changes Mode Of Payment Changes Effective Date Changes ID Cards Duplicate Policy Request Address Changes Mandate Database Basic Product Knowledge (Ded, Co-pay, DOV, SAS) Offer Coverage Alternative Quote Send Appropriate Correspondence Either System Generated Or Otherwise. Working Knowledge Of Department Workflow And Interdepartmental Workflows. *Cannot be on any type of warning. (Must be 90 days after probation period has ended. i.e. verbal, written, or final.)
<b><u>Disclaimer:</u></b>	MEGA Life and Health reserves the right, solely at their discretion, to change the nature and level of this career path.

## Customer Care Center Career Path

<b><u>Time Required In Current Position:</u></b>	6 Months or Equivalent Job Knowledge
<b><u>Current Position Title:</u></b>	Telephone Representative II
<b><u>Promotion Position Title:</u></b>	Telephone Representative III
<b><u>Division/Dept.:</u></b>	Customer Service
<b><u>Career Path Requirements:</u></b>	Quality Score Production Score Attendance/Punctuality Testing Knowledge
<b><u>Quality Scoring:</u></b>	Must maintain an average score of 95 for 97% of time in current position.
<b><u>Production Scoring:</u></b>	Must maintain minimum production requirements for 95% of time in current position.
<b><u>Attendance/Punctuality:</u></b>	Must comply with departmental attendance and punctuality standards.
<b><u>Testing Requirements:</u></b>	Must be proficient in the following areas as well as all testing requirements for prior career paths: Rerate Calls Complex Written Letters Complex Research (i.e. Accounting) Supervisor Calls Applications Add/Delete Riders Deductible Changes Student Validation State Specific Product Knowledge Endorsements Benefit Changes Move Money Back-up For Retention Team Special Projects NB/UW Process Comprehensive Knowledge Of Departmental Workflow And Processes Comprehensive Knowledge Of All Products Provide Leadership And Support To Team Members *Cannot be on any type of warning. (Must be 90 days after probation period has ended. i.e. verbal, written, or final.)
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