

# 02 CSI

## Processing Guide



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# Introduction

How you support your customers will greatly help your company reduce churn and increase participation in the CSI survey.

By starting the conversation with your customers and letting them know that you are their point of contact and resource for all things connected to their account, goes a long way to a positive CSI outcome.

Implementing a contact strategy for customers is as valuable as securing the deal. It is something we at Chess can help you with should you require some extra help.

Support in assisting with a welcome letter, advice on how to contact your base through newsletter or texts, whatever fits for your business we are happy to help support you and your business.

## Why Engage in CSI?

It is about having knowledge of your customer and any issues they may have and enabling you to resolve and manage them prior to your customer being selected for a CSI survey. Effectively contacting and managing the customer means you are forewarned and given the opportunity to resolve, rather than hear about them through the red flag process. The programme also provides financial reward and network recognition, all additional benefits from working with O2 for your business.

We will proactively notify the CSI point of contact within your business of each quarters survey dates in advance.



# Why Engage in CSI?

From Q1 2019 your CSI performance will be measured using a text-based survey. You will be measured across 5 key questions. Please note O2 will continue to run the Quadrangle survey for customers, but you will not be measured against this.

## What are the 5 questions on O2?

1. In general, how satisfied or dissatisfied are you with O2, where 1 means very dissatisfied and 10 means very satisfied?
2. How well does O2 meet with your expectations, where 1 means does not meet your expectations at all and 10 means completely meets your expectations?
3. Try to imagine a mobile operator, perfect in all regards. How close to this ideal is O2, where 1 means very far away and 10 means very close to the ideal?
4. How satisfied are you with the designated partner who manages your O2 account?
5. How easy is it to get the right help and support from your designated O2 partner?

## Will I be required to cleanse my customer base?

Yes, every quarter we will upload your customer base onto the Cloud Portal, this is your opportunity to cleanse the data ensuring the right contact within your customer's account is contacted to perform the survey.

Once you have completed your data cleanse please email into [retention@ChessPartner.co.uk](mailto:retention@ChessPartner.co.uk)

# Cleansing Your Data



The screenshot shows a login form with the following elements:

- LOG IN** (blue text)
- Dealer Code/User Name:
- Password:
- Remember me next time.
- Log In (blue button)
- [Forgot your password?](#)
- If you do not have a log in, please contact your BDM.

1. Log on to the partner portal via the Chess Partner website.
2. If you are new to Chess, please speak with your BDM to get set up in the first instance.
3. If you are an existing partner and do not believe you have a login, please check with our Retention team. They will advise who is currently listed as a user for your business.
4. If you have forgotten your password, please click the link below the login boxes to reset.
5. You will find the current quarter's CSI file in the '**COMMISSIONS**' tab once logged in.
6. Once downloaded from the Chess portal you will need to filter the columns in the spreadsheet to make it easy to establish new data from that you've added in the past quarter to your base.
7. This will be defined as '**NEW**'.
8. You may also see '**MISSING**' appear in the status column. This means that the customer was added in the period between the last CSI data being pulled from O2's base and the delivery of the CSI cleansed files to Chess. This cut off means they are only now being included for potential contact from CSI in the following quarter.
9. Anything cleansed from previous quarters will appear as '**CLEANSED**' you do not need to do anything with this.

The only exceptions to this are:

- If you need to change the Lead MPN or contact name/ email because of a change within that company.
- If the customer has left your base entirely and you believe that there is a need to remove them.

If you simply need to update the Lead MPN contact name/ email, please do so within the relevant cell.

If you spot a customer appear on the file that you believe should no longer appear, please do not delete any

information from the cells. Instead, please type a simple reason for removal in the column headed 'Reason For Removal' and it will be reviewed by the Chess Retention team and O2.

Important: You need to ensure that the correct individual within the end users' business is receiving the text survey or Quadrangle call. A person whom you have regular contact with over a member of their team who is unaware of your services for example, may see a very different score come through. This is a Chess document designed to ensure all partners

Dealer Code	Partner Name	Stockist (Distribution only)	DISE Account Number	Lead MPN (Text Survey Only)	Customer Name
12345	CHESS PARTNER LIMITED	PartnerDemoDisti	1234567	7123456789	JoeBloggsCleaningCo
12345	CHESS PARTNER LIMITED	PartnerDemoDisti	2345678	7921123456	TeleComs Phone Shop

**Blue = No changes required to these columns**

**Green = Please ensure all information in these columns is accurate**

If your customer base is not cleansed, then O2 will contact the oldest number on the account. To achieve any associated commercials to CSI you will be required to cleanse your data.

### Take Away Points for Cleansing

#### Mandatory Fields

- Account Number
- Lead MPN – which MUST be an O2 mobile number, and the O2 mobile number must belong to that account
- Account Name

#### Optional Content

- A contact number for the main Quadrangle survey – this could be the same as the lead mpn, an alternative mobile number on any network or a land line number
- Email address – for the Quadrangle survey

#### Important Points

- If you don't know something for the optional content, please leave the field blank. None@noemail or \*\*\*\*\* in a cell causes rejections when we submit to the networks. Doing this uses valuable team time correcting and delays the final upload.
- If you spot an account that should not be on your account, you must stipulate in the REASON FOR REMOVAL column with a simple reason why. I.E - Ported out. If you do not do this, this customer will still potentially be surveyed.
- If you request an account to be removed but the team find a valid reason why it should remain included, they will not remove the data. An advisory will be sent to you notifying you of any accepted removals or declined decisions to remove. Please investigate further accordingly with your teams.

# Red Flags

Low satisfaction scores between 1-4 trigger notifications to Chess. These are called Red Flags.

Red Flag alerts are sent to you by the Chess Retention Team as soon as they are received. These must be responded to within 48 hours to comply with the network SLA.

You will be asked to make contact and resolve the situation, feeding back to the Chess Retention Team once the investigation is complete.

If you have already dealt with an issue, you can appeal the red flag as soon as you receive it with any feedback on the issue and supporting evidence to the Chess Retention Team. If the appeal is accepted, it will not reflect in your CSI score. However, if the complaint is upheld this will count towards your CSI score for the quarter.



# CSI FAQs

## What is the KPI to achieve CSI in 2019?

There are 3 criteria you must achieve to qualify for CSI payment.

Please see below:

1. You must score an average  $\geq 62.50\%$
2. Your annualised Churn must be  $\leq 8\%$
3. You must have submitted your cleansed data for the Quarter to retention@ChessPartner.co.uk

Quarterly	
Cleansed Data	Churn $\leq 8\%$
YES	YES
	CSI Score $\geq 63\%$

\*Qualifying New Connections on the following:

- Small Biz
- Sharer

- PAYU
- Business unlimited with shared data
- Business OGB voice and SMS only

## Are there any penalties in 2019 as there have been in previous years?

No, there are no penalties in the 2019 CSI programme. This year is all about the reward to partners for positive participation.

## How often is a customer likely to be surveyed?

A customer will not be invited to complete the text survey more than once in 2 consecutive quarters. For the Quadrangle CSI survey, a customer will not be invited to complete the survey more than once in any 90-day period in line with Telefonica Market Research rules. This means that a customer could be surveyed twice in 2 consecutive quarters, e.g. if the sample is pulled more than 90 days after the previous quarter. As the surveys are conducted separately, using different methodologies and samples, there is a small chance that a customer may be asked to complete both surveys within that period.

## CSI FAQs

### Will I still receive Red Flag scores?

Yes, you will still be sent any Red Flags received from either the Quadrangle or Text survey. Allowing you to still manage and resolve any issues that your customer have experienced.

### Will there be an appeal process in 2019?

Yes, you will have two opportunities to appeal. Firstly, when you receive any Red Flags you can raise an appeal at this point by emailing [retention@ChessPartner.co.uk](mailto:retention@ChessPartner.co.uk) detailing the reason why this survey should be removed, with evidence to support. We will submit this to the network and advise of their decision.

When you receive your completed quarterly CSI results, you also have the chance to appeal within 14 days. This should be in writing to [kerrilendon@ChessPartner.co.uk](mailto:kerrilendon@ChessPartner.co.uk) with supporting evidence.

### What happens to split bases?

Where a customer has mobiles connected through two or more parties, this is regarded as a split base. For split bases you still need to supply an O2 mobile number which is on that account. You must supply the Lead MPN for all Split Accounts, and the Lead MPN must be from the Partner managed split of the account

### What happens with group accounts? (E.g. several accounts being managed by same person)

All accounts should have a separate lead MPN for each account.

# CSI Contact Information

Should you need assistance, your points of contact within Chess are:

## **Retention Team**

Retention@ChessPartner.co.uk

020 3793 8695

## **Partner Experience Team**

PartnerExperience@chesspartner.co.uk

0330 102 5620