WIRELESS 3-STORE COMPARISON STUDY
(CALL HANDLING OBSERVATION)

INSTRUCTIONS • QUESTIONNAIRE

- This is an anonymous telephone mystery shop/research study.
- You are required to call 3 wireless provider stores in the same day (no exceptions).
- You will speak with an employee by being or posing as a potential new phone customer.
- The purpose is to evaluate call handling, employee engagement and sales practices and compare the service experience.
- After the 3 calls, you will submit 4 questionnaires in the following order:
  - Report #1 = Observations of the call with store #1 (57 questions)
  - Report #2 = Observations of the call with store #2 (same 57 questions)
  - Report #3 = Observations of the call with store #3 (same 57 questions)
  - Report #4 = Store ranking (32 questions)
- You will receive 4 shop confirmations for this assignment (one for each required segment).
- Calls are expected to take 20-30 minutes.
- You will take the conversation up to obtaining pricing and then decline to sign up at the end of the conversation.
- No purchase is required and you will not be reimbursed for any purchase made.
- If you accept the assignment, you are agreeing to call all 3 stores on the same day and fill out all 4 questionnaires for payment to be made.

Before You Begin

- Confirm your 3 assigned stores to call
- Plan to call all 3 stores on the same day
- Take detailed notes during each call
- Know how to present yourself
- Prepare at least 1 question to ask
- Know what service timings to capture
- Know what phone handling observations are required

Don't Forget!

- Record the call through CX Group's IVR
- Document all required service times
- Take detailed notes on devices/plans recommended
- Report all information provided
- Ask at least 1 question
- Make all required observations
- Do not use a phone that is on a plan with the same service provider you are calling

General Requirements

- Do not use a phone that is on a plan with the same service provider you are calling.
  - Alternatively, there are easy instructions below to set up a free Google Voice phone number that you can use via their app.
- Do not request the shop if you cannot call all 3 stores on the same day.

- Read all instructions and both questionnaires before you complete the calls.
- You will receive 4 shop confirmations and fill out 4 reports (1 for each shop confirmation).
- Check your shop confirmation emails for the:
    - 3 stores you are required to call.
    - Date you selected to call all 3 stores (all must be called on the same day).
- Plan plenty of time to call all 3 stores on the same day, no exception.
- Complete the calls alone and without distractions around you.
- Confirm store hours for each location before starting the calls.
    - If you have any issues preventing the calls from being completed, notify your scheduler before submitting any of the reports.
- Make note of all required timing & observations, and ask at least 1 question.
- No purchase is required. Any purchases or contract you agree to will not be reimbursed.
- Submit all 4 reports to shopperhub.cxgroup.com within 12 hours of completing the visits.
    - Submit the 3 call observation reports AFTER calling each store (ideally BEFORE calling the next).
    - Submit the store ranking report LAST.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot have worked for the companies you are calling.

Shop Instructions

- Have a phone or other device with you to record service times.
- Use your phone to take notes during each call to help you remember the details.
    - IMPORTANT! Be sure to link your notes to the correct location for reporting.

Step #1: Create a free phone number from Google Voice (if needed)

- If you are NOT a customer of any of the providers you are calling, skip this step.
- If you ARE a customer of the providers you are calling, click here for instructions to set up a free Google Voice phone number to use for the assignment (takes about 5 minutes):
- Once validated, open the app to make your calls using the keypad within the app.
- Alternatively, you can use an alternate phone/phone number not associated with your phone service plan or your address to make the calls if you have access to one.

Step #2: Call into CX Group's phone system to validate the start/end time of your call

- Call into CX Group's IVR phone system at 866-265-6212 (toll free).
- Once you dial into the IVR system, you will be prompted to enter your assignment number. This can be found on your shop confirmation. Only enter the first series of numbers. For example, if your assignment number is 2089568-3658147, you would enter 2089568.
- After entering your assignment number, the system will ask you to dial the phone number you would like to call. Dial the call center phone number found in your shop confirmation, and follow the prompts. Do not dial a "1" before the area code once in the IVR system.

- If you receive a recording/voicemail, the call is disconnected, or you get a busy signal, hang up and call back later the same day (all call attempts must be generated through the IVR).
    - If this occurs, you must make at least 3 attempts to reach an employee.
- If you get an error message from the IVR when calling the 866 phone number, try calling 617-284-5807 instead (this is an alternate phone number for the IVR).
- You will get an IVR confirmation number. Write down the number and enter it in your report.

Step #3: Make the initial connection & greeting observations

- Record the time it takes to reach a live employee in minutes:seconds (ex: 01:45).
    - Start timing once the IVR system connects the call and you hear ringing.
    - Stop timing once a live employee is on the line.
    - If there is a hold to speak to an employee, wait until an employee is available.
- Listen carefully and document if the recorded (or live) greeting included the following:
    - Thanked you for calling.
    - Identified the company you were calling.
    - Provided the employee's name (include their name in your report).

Step #4: Speak to an employee, document required timings, and make required observations

- Throughout the conversation, record the percentage of time each of the following happened (they must add up to 100%).
    - % of time consisting of 'dead air' (periods of silence) while on the call with the employee.
    - % of time that was spent in active conversation with an employee.
- If placed on hold one or more times, document the total time spent on hold during the call in minutes:seconds (ex; 00:45).
- Pose as a new customer: State that you would like information on mobile plan options.
    - If you ARE NOT a current customer: Use your real name, phone number (and address, if asked for it).
    - If you ARE a current customer, use an alias name, your real address, and your free Google Voice phone number (or an alternate number not associated with you or your address). *If your address is questioned, say you just moved in.
- Let the employee take the lead in asking questions and providing options (do not rush them).
- Answer questions based on your own wireless needs. Be prepared to share things such as:
    - How many lines you currently have and will need
    - What you currently pay per month & if your phone(s) are paid off
    - Why you are looking to switch providers, etc.
    - If asked if you are under contract, say 'No'.
- Write down the name(s) of the plan(s) recommended and enter them in your report.
- Write down any plan benefits or promotions mentioned.
- Write down any elements related to the provider's network that are mentioned.
- Write down any accessories offered to you or mentioned.
- **Required!** Ask at least one question related to the plan(s) being offered.

- Take the discussion right up to the point where signing up for a plan would be the next step, then decline to move forward using one of the following reasons:
    - Have to discuss further with your spouse/significant other/partner
    - Currently shopping around and not ready to decide today
    - Need to think everything over and decide what you want to do
- If offered, accept any plan information/cost via text or email and upload them with your report.
- Get the employee's name (ask for it if not provided).

Step #5: Submit all 4 reports within 12 hours of the visit

- Take your time submitting reports and accurately enter the results (critical).
- Take good notes after each call to help you submit accurately (critical).
- Submit the 3-call reports BEFORE filling out the 3-way ranking report. This is to allow you to think through all aspects of each experience before ranking the stores.

TELESALES CALL OBSERVATION QUESTIONNAIRE

Shop date:

Start time:

End time:

Store Information

1. Retailer for this questionnaire:

[ ] AT&T
[ ] Verizon
[ ] T-Mobile

Initial Call/Greeting

2. From the time you initiated the call, how long did it take to reach an employee?

[ ] Under 30 seconds
[ ] 30 seconds to 1 minute
[ ] 1:01 - 3 minutes
[ ] 3:01 - 5 minutes
[ ] 5:01 - 8 minutes
[ ] 8:01 - 10 minutes
[ ] Greater than 10 minutes

3. Was the time to get assistance acceptable or unacceptable to you?

[ ] Faster than expected
[ ] As expected
[ ] Slower than expected

4. Did the recorded (or live) greeting include a 'Thank you for calling' statement and identify the company by name?

For example, "Thank you for calling AT&T."

[ ] Yes
[ ] No

5. Was the employee's name provided either by being audibly stated in the recorded greeting or by their introducing themselves by name?

[ ] Yes
[ ] No

6. Were you prompted to provide your name either during the recorded greeting or once you reached an employee?

[ ] Yes
[ ] No

Sales Interaction

7. Was a call transfer required to reach the intended department?

[ ] Yes
[ ] No

8. Provide the name of the employee who primarily assisted you:

9. Did the employee put you on hold during the call?

[ ] Yes
[ ] No

10. If yes, how many times were you put on hold during the call?

[ ] 1 time
[ ] 2 times
[ ] 3 or more times
[ ] N/A

11. How long were you on hold?

Select the amount of time you were placed on hold. If you were placed on hold more than once, include the total time you spent on hold.

[ ] Under 30 seconds
[ ] 30 seconds to 1 minute
[ ] 1:01 - 3 minutes
[ ] 3:01 - 5 minutes
[ ] 5:01 - 8 minutes
[ ] 8:01 - 10 minutes
[ ] Greater than 10 minutes
[ ] N/A

12. How much effort did the employee make to understand your family size (number of phones or lines needed), needs, and interests?

[ ] High: Employee made significant effort to engage me in a dialogue to try and better understand my needs
[ ] Medium: Employee made casual effort to understand my needs, but dialogue was brief
[ ] Low: Employee made little to no effort to engage me and determine my needs

13. Did the employee offer to look up your service address to qualify eligibility for home internet?

[ ] Yes
[ ] No

14. Did the employee inquire about your employment/military/school enrollment status for the purpose of positioning a service discount?

[ ] Yes
[ ] No

15. How would you rate the employee's personality during your interaction?

[ ] Exceptional: Employee established a good rapport, was friendly, and made me feel comfortable during our interaction
[ ] Acceptable: Employee was cordial but not overly friendly during our interaction, "strictly business"
[ ] Needs Improvement: Employee was rude, unprofessional, or made me feel uncomfortable during our interaction

16. What do you believe occurred that prevented the employee from establishing better rapport?

Enter N/A if you rated the employee's personality during your interaction as 'Exceptional'.

17. The employee asked questions to understand what I valued or what mattered most to me.

[ ] Strongly agree
[ ] Somewhat agree
[ ] Neither agree nor disagree
[ ] Somewhat disagree
[ ] Strongly disagree

18. The employee seemed genuinely interested in understanding what I valued most or what mattered to me.

[ ] Strongly agree
[ ] Somewhat agree
[ ] Neither agree nor disagree
[ ] Somewhat disagree
[ ] Strongly disagree

19. The employee was respectful when addressing my questions, concerns, or confusion and DID NOT make me feel awkward or embarrassed.

[ ] Strongly agree
[ ] Somewhat agree
[ ] Neither agree nor disagree
[ ] Somewhat disagree
[ ] Strongly disagree

20. The employee sought to understand what, if anything, made me dissatisfied with my current carrier, plan, or phone.

[ ] Strongly agree
[ ] Somewhat agree
[ ] Neither agree nor disagree
[ ] Somewhat disagree
[ ] Strongly disagree

21. How useful were the answers the employee provided to your questions?

[ ] All of the answers provided were useful
[ ] Most were useful, but some were not useful
[ ] About half were useful, while half were not useful
[ ] Most were not useful, but some were useful
[ ] None of the answers provided were useful
[ ] N/A – I did not ask a question

22. How comprehensive was the solution offered by the employee based on your needs and interests?

[ ] Very Comprehensive – The employee provided a solution that met all (or almost all) of my needs
[ ] Somewhat Comprehensive – The employee provided a solution that met most of my needs, but didn't address some important aspects
[ ] Not Comprehensive – The employee did not provide a solution that would meet most of my needs, did not provide a solution at all, or completely missed the mark on addressing my most important needs

23. What, if anything, do you believe was missing from the solution, and what unanswered questions did you have?

24. Did the employee send you a quote?

Upload a photo of the quote sent to you.

[ ] Yes
[ ] No

25. What type of service(s) did the employee include in their sales proposal?

[ ] Both Mobile and Home Internet services
[ ] Mobile services only
[ ] Home Internet services only
[ ] No services were offered to me

26. Did the employee discuss a branded credit card as part of the proposal?

[ ] Yes
[ ] No

27. Did the employee discuss a mobile and home discount or bundle that's available with select plans?

[ ] Yes
[ ] No

28. If applicable, which plan(s) did the employee propose as part of your solution?

Select all that apply.

[ ] AT&T – Unlimited Premium PL (Mobile)
[ ] AT&T – Unlimited Extra EL (Mobile)
[ ] AT&T – Unlimited Starter SL (Mobile)
[ ] AT&T – Value Plus VL (Mobile)
[ ] AT&T – 4GB (Mobile)
[ ] AT&T – Internet 5000 (Home Internet)
[ ] AT&T – Internet 2000 (Home Internet)
[ ] AT&T – Internet 1000 (Home Internet)
[ ] AT&T – Internet 500 (Home Internet)
[ ] AT&T – Internet 300 (Home Internet)
[ ] T-Mobile – Experience Beyond (Mobile)
[ ] T-Mobile – Experience More (Mobile)
[ ] T-Mobile – Essentials (Mobile)
[ ] T-Mobile – Essentials Saver (Mobile)
[ ] T-Mobile – All-In (Home Internet)
[ ] T-Mobile – Amplified (Home Internet)
[ ] T-Mobile – Rely (Home Internet)

[ ] Verizon – myPlan Unlimited Ultimate (Mobile)
[ ] Verizon – myPlan Unlimited Plus (Mobile)
[ ] Verizon – myPlan Unlimited Welcome (Mobile)
[ ] Verizon – 5G Home Ultimate (Home Internet)
[ ] Verizon – 5G Home Plus (Home Internet)
[ ] Verizon – LTE Home Plus (Home Internet)
[ ] Verizon – LTE Home (Home Internet)
[ ] Verizon – Fios 2 Gig (Home Internet)
[ ] Verizon – Fios 1 Gig (Home Internet)
[ ] Verizon – Fios 500 Mbps (Home Internet)
[ ] Verizon – 300 Mbps (Home Internet)
[ ] Other Mobile Plan
[ ] Other Home Internet Plan
[ ] No Specific Plan Offered

29. If other mobile or home internet plan, what plan was proposed?

30. Did the employee propose any phone or device promotions as part of your solution?
[ ] Yes
[ ] No

31. Did the employee discuss any benefits of the proposed plan(s) beyond talk, text, and data allowance?
[ ] Yes
[ ] No

32. Which plan benefits were discussed with you?
Select all that apply.
[ ] 5G access
[ ] Mobile hotspot allowance
[ ] Streaming services (e.g., Netflix, Disney, Hulu, Max, Music Streaming, YouTube Premium)
[ ] Premium services (e.g., Cloud Storage, Apple One, Walmart+)
[ ] International benefits (e.g., calling outside of the U.S., traveling outside of the U.S.)
[ ] Call filter/spam blocker
[ ] Other benefits not listed here
[ ] Didn't discuss any but had me review benefits on digital or paper resource
[ ] Discussed checked off benefits and had me review additional benefits on digital or paper resource
[ ] N/A – did not discuss plan benefits with me

33. Did the employee specifically discuss the benefits of their network at any point during the sales interaction?
[ ] Employee extensively discussed the network with me
[ ] Employee made some mention of the network
[ ] Employee made no mention of the network during our entire interaction

34. Which of the discussion points were addressed?
Select all that apply.
[ ] Streaming capabilities
[ ] Gaming capabilities
[ ] Speed
[ ] Reliability/latency
[ ] Other 5G experiences
[ ] Using at home or away from home
[ ] None of the above

35. The employee did not appear to be following a rehearsed script or routine and worked to understand my situation.
[ ] Strongly agree
[ ] Somewhat agree
[ ] Neither agree nor disagree
[ ] Somewhat disagree
[ ] Strongly disagree

36. The employee seemed objective and unbiased in what they presented. They did not seem

motivated to push a certain plan or certain phone, even if it fit my needs.

[ ] Strongly agree
[ ] Somewhat agree
[ ] Neither agree nor disagree
[ ] Somewhat disagree
[ ] Strongly disagree

37. How much effort did the employee make to get you to close on the sale today by signing up for a new service plan?

[ ] High: Employee made significant effort to have me agree to the sale/purchase, asking several times throughout our interaction
[ ] Medium: Employee made some effort to close the sale, but it felt casual
[ ] Low: Employee made little or no effort to have me close the sale

38. After you declined the offer to close, did the employee attempt to overcome any objections you had to the sale?

[ ] Yes
[ ] No

39. How knowledgeable was the employee regarding all of the products and services discussed during the interaction?

[ ] High: Employee showed a significant level of expertise regarding the products and services discussed, they seemed to have all the answers
[ ] Medium: Employee seemed well-versed in the products and services, but did not give the impression of total expertise
[ ] Low: Employee seemed to have little to no knowledge of the products and services discussed, answers given had low confidence

40. If applicable, which equipment protection services did the employee discuss with you?

This question relates to insurance protection plans. Select all that apply.

[ ] Mobile Protection Solution
[ ] Home Device(s) Protection Solution
[ ] The employee didn't discuss any protection services

41. Did the employee discuss a branded mobile app as an additional benefit of being a customer?

[ ] Yes
[ ] No

42. Did the employee discuss or offer to sell any accessories during the sales interaction?

[ ] Yes
[ ] No

43. Which types of accessories were offered to you?

Select all that apply.

[ ] Cases
[ ] Charging
[ ] Screen Protector
[ ] Audio
[ ] Gaming
[ ] Health and Fitness
[ ] Vehicle Mounts
[ ] Security
[ ] Smart Home
[ ] Smart Watch
[ ] Other Accessory
[ ] No accessories were offered or discussed

44. If Other Accessory, what was offered?

45. Did the employee position a bundle or other promotion on accessories?

[ ] Yes
[ ] No
[ ] No accessories were offered or discussed

46. Did the employee discuss any other solutions not previously mentioned?
Example: connected devices like cameras, smartlocks, pre-paid services, etc.
[ ] Yes [ ] No

47. Which additional solutions were discussed with you?

48. Did the employee offer to follow up with you at a later date regarding this transaction?
[ ] Yes [ ] No

49. If yes, how did the employee explain they would follow up with you?

General Observations

50. Enter the percentage of time the call consisted of 'dead air' (periods of silence):
Enter the percentage of time that consisted of dead air (silence) from the moment you were connected to an employee until the end of the call. Do not include any time you were placed on hold. Format as a whole number (e.g., 30). The numbers you enter for questions 50 and 51 must add up to 100.

51. Enter the percentage of time you spent in active conversation with the employee:
Enter the percentage of time spent in active conversation with the employee from the moment you were connected to an employee until the end of the call. Format as a whole number (e.g., 70). The numbers you enter for questions 50 and 51 must add up to 100.

52. Did the employee's audio environment sound professional and conducive to a business conversation?
[ ] Yes [ ] No

53. Did the employee have to consult with a peer or Manager at any point during the interaction?
[ ] Yes [ ] No

54. What best describes the employee's tone, listening ability, and focus?
[ ] Sounded engaged, listened without distraction, and did not make me feel rushed
[ ] Listened but seemed distracted by things around them
[ ] Sounded bored, scripted, or disengaged

55. Based on this experience, how likely are you to recommend this carrier's products or services to a friend or family member?
[ ] 5 – Very likely
[ ] 4
[ ] 3
[ ] 2
[ ] 1 – Not at all likely

56. What, if any, aspects of your overall experience would hinder your interest to buy from this carrier over the phone?
Select all that apply.
[ ] Plan knowledge
[ ] Product knowledge
[ ] Promotion knowledge
[ ] Cost of equipment
[ ] Cost of monthly service
[ ] Employee interaction/personality
[ ] Wait time
[ ] Felt ignored or neglected
[ ] I would never buy over the phone from any carrier
[ ] N/A – I would buy from this carrier over the phone

57. Please provide any additional feedback regarding your overall shopper experience or share anything that was surprising or unexpected about your interaction that influenced your overall perceptions.

Enter N/A if there is nothing additional about the experience you feel is important for the client to know.

58. What time zone did you make the call from?

[ ] Eastern Time Zone
[ ] Central Time Zone
[ ] Mountain Time Zone
[ ] Pacific Time Zone
[ ] Hawaiian Time Zone
[ ] Alaskan Time Zone

59. Enter the area code of the phone number you called from:

60. IVR Confirmation Number:

END OF QUESTIONNAIRE