NEW AGENT SURVIVAL GUIDE

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AGENT OR CLIENT SERVICE PROFESSIONAL (CSP)

Thank you for joining LATEAM LLC. We look forward to an enjoyable and rewarding partnership!

The purpose of this survival guide is to prepare you for your integral role in the success of your own small business; our business; and that of Arise Virtual Solutions and their clients.

Please take the time to read it and implement all suggestions as they are meant for your individual success.

First let's start with the single most important trait, quality, or characteristic you can offer –

COMMITMENT

FOOD FOR THOUGHT:

By entering here, you agree to give 100% of what you have
There are no excuses.
Every day, every moment, is an opportunity to excel, to be more, to achieve your best.
Do not squander your time by going through the motions
Train hard and get results.
At the end of the day, look in the mirror and ask yourself if you gave it your all.
If you don't have that level of commitment, don't waste your time or ours.

Does this describe you? We sure hope so.

LATEAM LLC only wishes to support AGENT's that are honest, professional, disciplined, and accountable. This calls for each AGENT to build a BRAND that signifies integrity and dedication. This starts with being committed to your goals and those of your affiliates.

DOCUMENTS FOR SIGNATURE

As a new AGENT you will be asked to sign or complete several documents. These will be shared with you at the **appropriate time** for your signature. ***PLEASE ALWAYS CHECK YOUR SPAM OR JUNK FOLDER TO ENSURE RECEIVING ALL COMMUNICATIONS.***

ALL LEGAL DOCUMENTS ARE SENT USING SIGNNOW

1. W-9 Form

- This form identifies you as an independent contractor with **LATEAM LLC**.
- This is signed upon joining **LATEAM LLC**.

2. Independent Contractor Agreement (ICA)

- This form clearly outlines the expectations of LATEAM LLC as your Support Call Center Company and you as the performing AGENT. In addition to this document, you will be obligated to the terms of your client Statement of Work (SOW)
- This is signed upon joining LATEAM LLC

3. Statement of Work (SOW)

- The *Primary SOW* is issued by Arise to **LATEAM LLC**
  - You the Agent are listed as the Authorized User
  - **LATEAM LLC** signs this document as the Service Partner in Contract with Arise
- The *Secondary SOW* is issued by us to you the agent
  - It is provided to you for signature approximately 7-10 days before you begin working.

5. Direct Deposit Form

This permits **LATEAM LLC** to make direct deposits of your revenue earned directly to your bank account or financial institution.

COMMUNICATIONS/CONTACT

You should expect to receive email/phone communications from the following: **Please always check spam/junk for missed emails!**

- LATEAM LLC
- ARISE (INCLUDES VARIOUS DEPARTMENTS)
- CLIENT RESULTS TEAM (employed by Arise to manage your results in the specific client program)

NOTE: Never directly communicate with the client. This is a breach of the specific language found in the master agreement between Arise and the Client. Such action could prompt immediate removal from your client program and a future ban on any new clients.

PROFESSIONAL ETIQUETTE AND HOME OFFICE

Email Signature

As you communicate regularly with **LATEAM LLC,** and others, certain information should be readily available within an email signature. **LATEAM LLC** and Arise interact daily with 100's of persons or departments. Often more is needed than just a name. For example, the client may also need to know your affiliate Service Partner or IB, your AGENT ID and the respective program you service since many client managers manage more than one program.

CREATE YOUR EMAIL SIGNATURE

The simplest way is to copy and paste this into your email signature box and make the necessary modifications. (replace the generic with your specific info) Typically email signatures are crafted from your settings within your email service. Please make sure you copy and paste the entire signature including the Important Notice disclaimer! You may adjust the spacing as you see fit.

Full Name
AGENT ID ######
614-555-1212(replace with your phone #)
Program Name or Class (if applicable)
LATEAM, LLC
Website: www.4lateam.com

Statement of Confidentiality

*The contents of this e-mail message and any attachments are confidential and are intended solely for addressee. The information may also be legally privileged. This transmission is sent in trust, for the sole purpose of delivery to the intended recipient. If you have received this transmission in error, any use, reproduction or dissemination of this transmission is strictly prohibited. If you are not the intended recipient, please immediately **notify** the sender by reply e-mail or phone and **delete** this message and its attachments, if any.*

Whitelisting email addresses

Please add the following addresses to your contacts list immediately. This helps to avoid emails being routed to your spam or junk folder due to security settings with your email provider. You should continue to check spam/junk as a daily habit.

- LATEAM@OUTLOOK.COM
- INFO@4LATEAM.COM

CHANGE OF PERSONAL INFORMATION POLICY

All personal information needs updated as necessary. This is your responsibility as the AGENT to keep LATEAM AND OUR PARTNERS with current information to include:

- Name change
- Address
- Service Phone Line
- Alternate Phone line
- Banking Info for Direct Deposit
- Email address

Please click the link to make any updates. Agent Profile Update

AGENT ASSISTANCE

We are here to help you succeed. Please use all resources we provide. So, we invite you to reach out to us as needed. Please add these email address, links and phone numbers to your contact list on your phone also.

Non-Urgent matters:

- Look for your answer on our Agent Dashboard we have loaded this with all sorts of useful info for our agents to access 24/7!
- Email LATEAM LLC – info@4lateam.com or lateam@outlook.com
- Schedule a 1-1 session - https://infofromlateamllc.acuityscheduling.com/

Urgent Matters:

- Please call or text **LATEAM LLC** at 614-547-9211.
    - Include your Name and Client/Class and AGENT/AGENT ID in your text

LET'S BE SOCIAL!

Please join our AGENT FORUM via our website. This is a way to learn of important sessions hosted by Arise or LATEAM LLC. You can also "virtually" meet some of your other colleagues with the company.

AGENT/AGENT STATUS

You will see that you have two basic AGENT/AGENT statuses on the Arise Portal!

- Pending = status upon joining LATEAM and will remain as such until you do any of the following:
- Start/Cancel Enrollment, Pass, Drop or Fail a client certification course.
- Active = what your status changes to once you have taken any of the actions listed above.

HOME OFFICE SET UP

It is important now to ensure your home office is well appointed. Professionalism is critical as well. When interacting with LATEAM LLC it is ok to be more casual. However, when interacting with anyone from Arise or your Client Results team it is crucial you maintain a strictly professional environment especially during certification, 1-1's with any performance coaches, client huddles, other meetings, etc.

Workstation Requirements:

- Please use this link for home office equipment still needed.

Quiet Distraction Free Home office

- Designate a room or space as your workplace – this could be a spare bedroom; a dedicated office; or some other room that offers a quiet place to work
- Help your family (especially our little ones) to understand when we are working or certifying. Some even put a sign on their door that says, "do not disturb!" or "Mommy is working go ask dad!" LOL
- Choose training/service times that work for your lifestyle or family. In example, if you have children in school from 9-3 this might be the best time to certify/service
- Use a noise cancelling headset just in case your neighbor decides to cut his grass while you service
- Test your workspace environment – have a friend or family member call your work phone and conduct a test conversation using your headset to see how it sounds on the other end!

Other suggestions

- Get dressed when you service – business casual- sometimes we need to physically look the part to be mentally present during service time.
- Make your home office personal and comfortable with family photos and other familiar objects
- A room with a view is best – it's good to see the sun shining or the first snow falling
- Add a dorm room fridge to your workspace and keep water and other favorites available.
- Keep snacks handy like your favorite granola bar; chocolate bar or trail mix to give you a pick me up for longer service periods.
- **SMILE** – we can hear it in your voice.

"**Smiling** affects how we **speak** to the point that listeners **can** actually identify the type of **smile** based on sound alone…" And as **you** know, your tone of voice conveys 84% of the message **over** a **phone**. Therefore, having a "**smiling** tone" is business imperative.

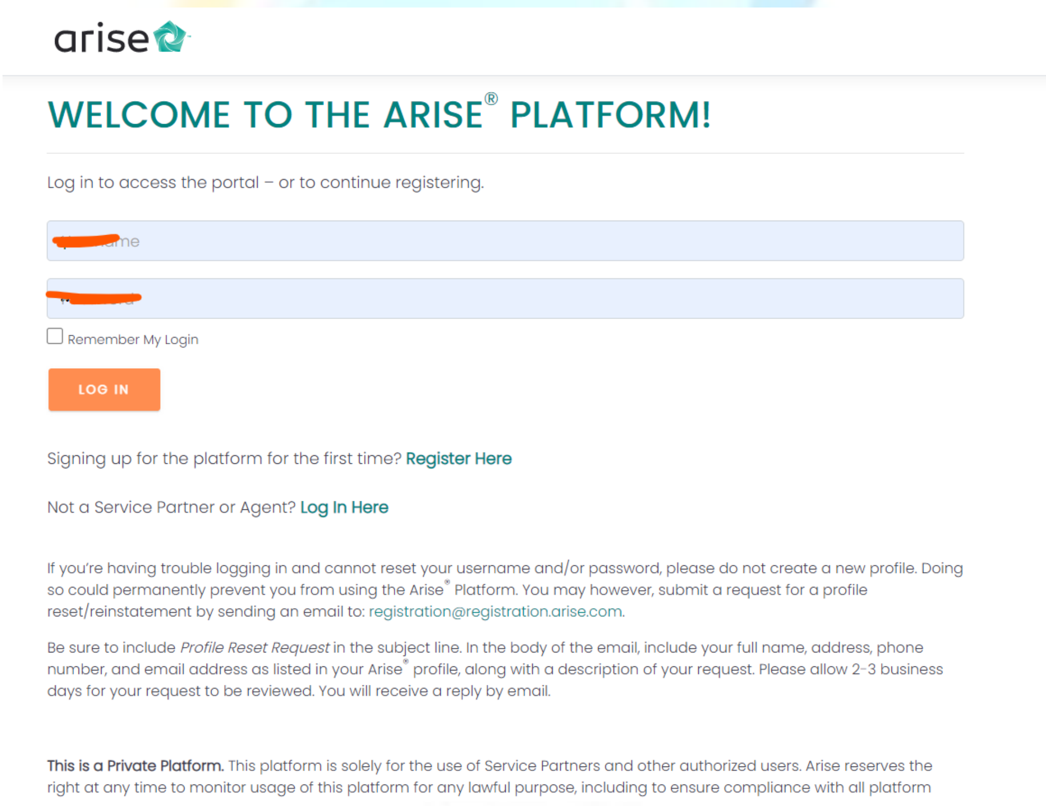
Cited from - Fusion BPO

NAVIGATING THE ARISE PLATFORM

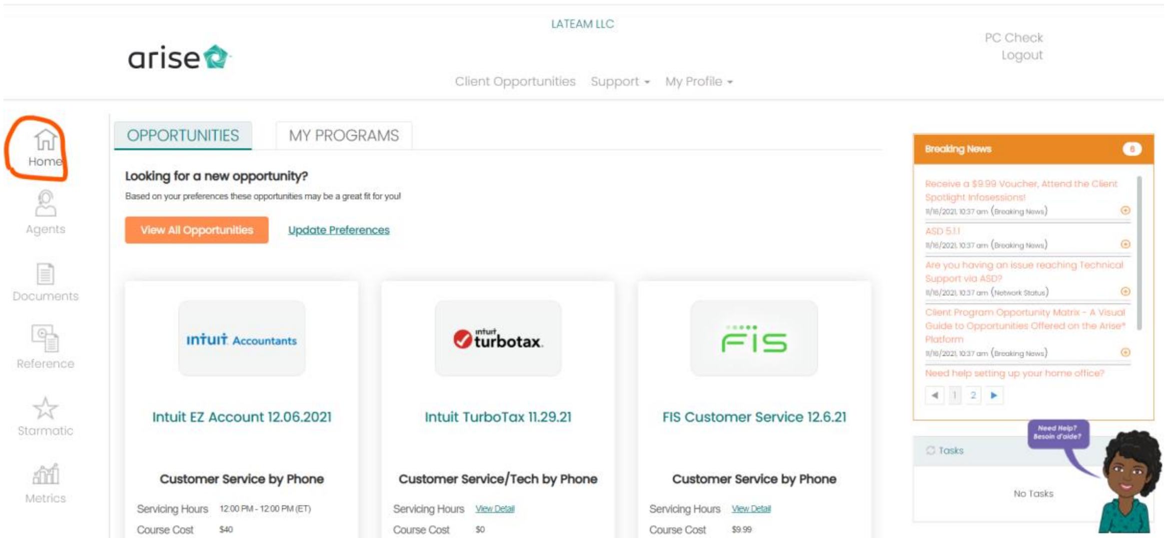
Purpose of the Arise Platform:

- Telephony and data infrastructure to connect to servers and databases of the client you need to provide call center support.
- Systems that help you keep track of performance, hours and quality metrics for yourself.
- Access to certification courses that prepare you for working on specific client programs.
- Help and support to answer your questions via automated AVA (automated virtual assistance) or live Agent help.
- Support resources that can provide enhancement and/or technique sessions and informational sessions regarding the client program you choose.

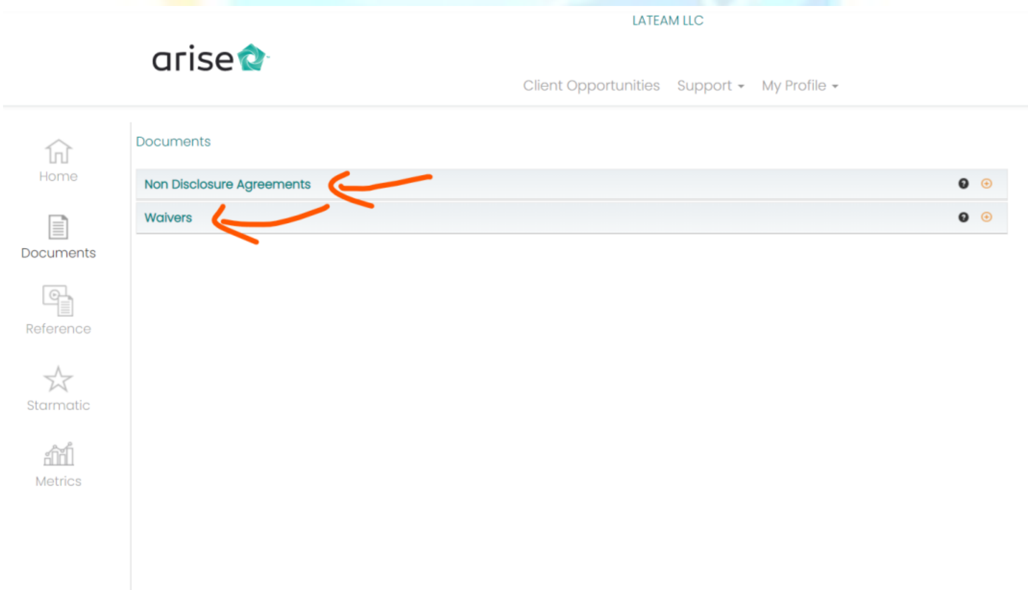
To access the Portal, log in at https://portal.arise.com



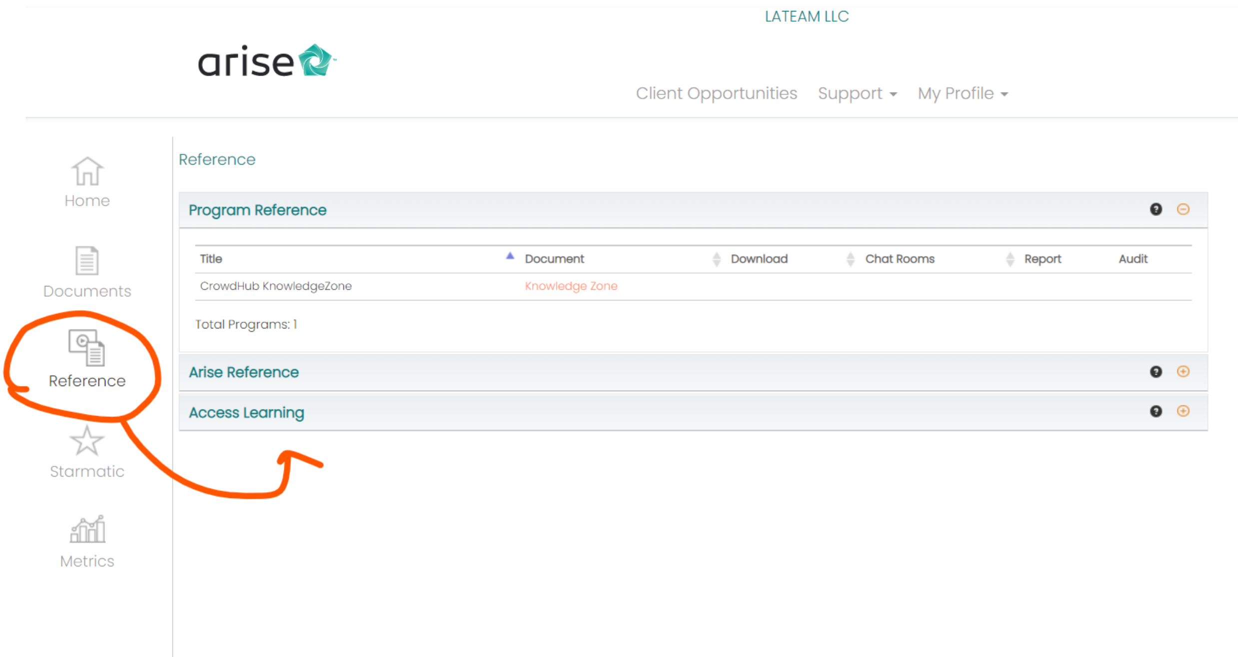
You will land on the Home page but can also return to this page by clicking on the HOME icon – from this page you can view a "sneak peek" of the current client opps! To view all, click the Orange View All Opportunities.



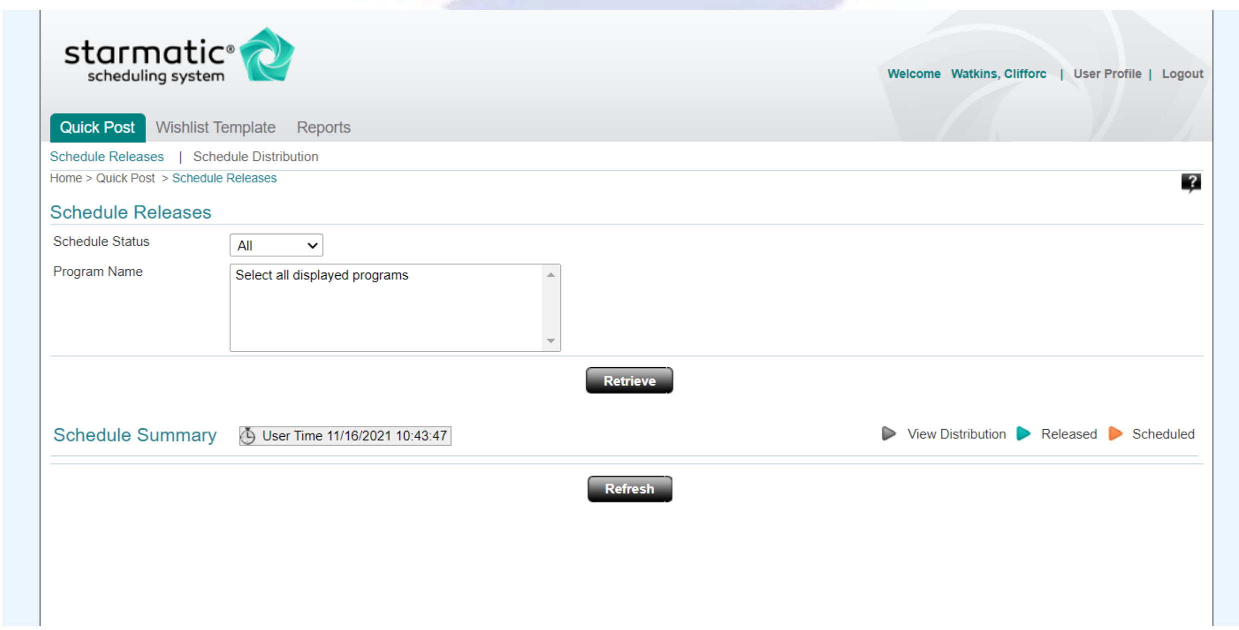
The DOCUMENTS icon is where you go to locate a copy of your Non-Disclosure; Waiver; SOW and other agreements and important documents.



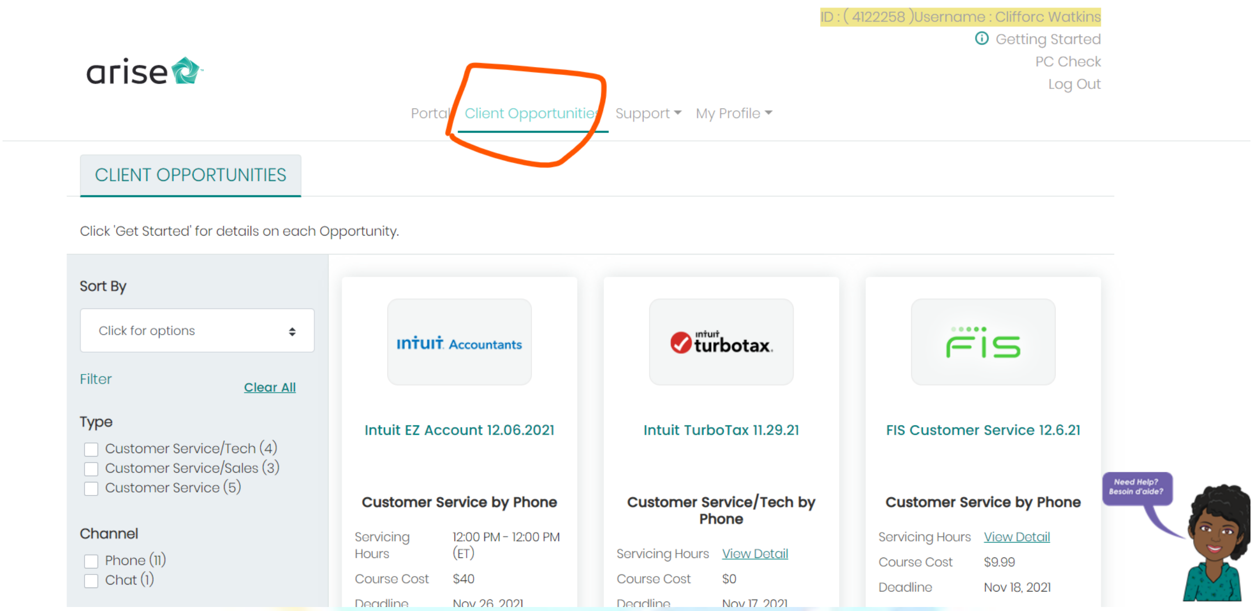
The REFERENCE icon will bring you to client resources that you may need to refer while you are working on your client program.



The STARMATIC icon will bring you to the Starmatic scheduling tool, which is where you will schedule service intervals (an interval is 30 mins) or run reports to summarize your schedule adherence. More about this later.



We will provide more details about selecting a client in your Enrollment Survival Guide. But to view all client course opportunities you would click on the Client Opportunity tab at top center anytime you wish to return to the Home Page click the Portal tab up top center! To confirm any client revenue please go to our [Agent Dashboard > Client Service Revenue Section.]



AVA – Arise Virtual Assistant

AVA – is a high–IQ artificial intelligence agent that can handle complex questions with high accuracy and human-level performance. This can in many cases provide you with instant answers to many of your questions in Partner Support, Enrollment and Admissions.

Simply click on the Animated Help Icon in the Lower Right any Arise screen to initiate a chat with an agent.

Type in a few key words and you will find options to best fit your need.

WHAT'S NEXT?

Select a Client Certification Program

Successfully Certify

Enter Production

As you move to each phase a new Survival Guide is available. To view any or all they are located on our Agent Dashboard > Forms/Guides Section.

- **Enrollment Survival Guide**
- **Certification Survival Guide**
- **Production Survival Guide**