

BEFORE THE FLORIDA PUBLIC SERVICE COMMISSION

Docket No. 900960-TL
Filed: August 16, 1993

In Re: Show Cause proceeding against
Southern Bell Telephone and Telegraph
Company for misbilling customers

* * * * *

DEPOSITION OF: ELIZABETH MCKENZIE
DATE TAKEN: Wednesday, September 1, 1993
TIME: 9:05 a.m.
PLACE: 900 North Nova Road
Daytona Beach, Florida
REPORTED BY: LISA L. TAYLOR, RPR-CP, Court
Reporter and Notary Public

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ALL PROFESSIONAL REPORTERS
444 SEABREEZE BOULEVARD, SUITE 470
DAYTONA BEACH, FLORIDA 32118
904-252-8443

DOCUMENT NUMBER-DATE

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A P P E A R A N C E S

REPRESENTING THE CITIZENS OF THE STATE OF FLORIDA:

CHARLES J. BECK, Esquire
Deputy Public Counsel
Office of Public Counsel
c/o The Florida Legislature
111 West Madison Street
Room 812
Tallahassee, Florida 32399-1400

REPRESENTING SOUTHERN BELL TELEPHONE AND TELEGRAPH COMPANY:

ROBERT G. BEATTY, Esquire
Museum Tower Building
150 West Flagler Street
Suite 1910
Miami, Florida 33130

REPRESENTING FLORIDA PUBLIC SERVICE COMMISSION:

JEAN R. WILSON, Esquire
Division of Legal Services
101 East Gaines Street
Tallahassee, Florida 32399-0872

REPRESENTING ELIZABETH MCKENZIE:

JUDITH MERKEL, Esquire
918 Lucerne
Orlando, Florida 32802

ALSO PRESENT:

Carl S. Vinson, Jr.
Management Review Specialist
Bureau of Regulatory Review
Florida Public Service Commission
101 East Gaines Street
Tallahassee, Florida 32399-0872

JULIA AUGUST
Staff Manager
BellSouth Telecommunications

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C O N T E N T S

TESTIMONY OF ELIZABETH MCKENZIE

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S T I P U L A T I O N S

It is hereby agreed and so stipulated by and between the parties hereto, through their respective counsel, that the reading and signing of the transcript are expressly reserved by the Deponent.

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P R O C E E D I N G S

ELIZABETH McKENZIE

having been first duly sworn, was examined and testified upon her oath as follows:

DIRECT EXAMINATION

BY MR. BECK:

Q Ms. McKenzie, my name is Charlie Beck. I'm with the Office of Public Counsel and I'll be starting off the deposition today. Staff for the Commission may also have some questions after I'm done.

I want to tell you up front that it's not my intent today to ask you the names of any other service representatives or members of the union as far as what they may have or may not have done. I'm not going to ask you the names of any persons that may have done anything wrong. The intent today is simply to ask you about your job as a service rep and some of the things surrounding service provided to customers.

As we go through the deposition, if any of the questions are not clear, would you please stop me and we'll clear it up before going forward.

Could you please state your name?

A Elizabeth K. McKenzie.

Q Are you employed by Southern Bell?

A I am.

1 Q What job do you have?

2 A I am a collection's representative.

3 Q How long have you had that position?

4 A Approximately two years.

5 Q Has that been here in Daytona Beach?

6 A No, sir. It's in Orlando.

7 Q Do you work in Orlando presently?

8 A Yes.

9 Q What job did you hold before collection's
10 representative?

11 A Service representative.

12 Q How long did you hold that?

13 A Seventeen years.

14 Q And where did you hold that position?

15 A Daytona Beach.

16 Q Could you tell me a little bit of what's involved
17 in being a collection's representative?

18 A Collection's representative, we answer incoming
19 calls from customers who need to make payment arrangements,
20 we do outgoing calls from customers who -- to collect their
21 bills. After their service has been interrupted or
22 disconnected, then we try to collect the bills.

23 Q What brought you to change your position to
24 collection's representative?

25 A I needed a change. I've been a service

1 representative a long time and --

2 Q Was it voluntary on your part?

3 A Yes, to switch.

4 Q The questions I'm going to ask for the remainder
5 of the deposition, unless I state otherwise, are going to
6 be focused on your job as a service rep here in Daytona
7 Beach.

8 Did you receive regular appraisals in your job as
9 a service representative?

10 A Yes.

11 Q About how often were you receiving appraisals?

12 A You get a yearly appraisal and then there are mini
13 appraisals every quarter.

14 Q Do you recall the major categories that you were
15 appraised on in your appraisals?

16 A Yes. Customer service, that would -- included
17 clerical work and sales.

18 Q Do you recall what the relative weighting for each
19 of them was?

20 A No, sir. I'm sorry.

21 Q Do you have an impression or feeling of which of
22 those two categories was more important to the company?

23 MR. BEATTY: If you know.

24 THE WITNESS: Important to the company? No.

25 BY MR. BECK:

1 Q Do you have a belief of which was more important
2 for your appraisal?

3 A Sales.

4 Q Why do you say that?

5 A Because I got a less than satisfactory based on
6 sales.

7 Q Did that happen once?

8 A Yes.

9 Q Could you elaborate on that? What -- Did your
10 supervisor talk to you about it?

11 A Yes.

12 Q What did your supervisor say?

13 A I don't remember.

14 Q Do you recall about when this was that that
15 happened?

16 A 1990.

17 Q

18 A

19 Q

20 A

21 Q

22 A

23 Q

24 A

25

1 wasn't anything I needed to know.

2 Q

3

4

5 A No, sir.

6 Q Have you ever heard of persons cheating in order
7 to meet their sales quota?

8 A No.

9 Heard of?

10 Q Yes.

11 A No.

12 Q Okay.

13 A Rumor, you know.

14 Q You never talked to anybody that said certain
15 people were cheating, for example?

16 A No.

17 Q Do you feel that the sales quotas you were given
18 were fair?

19 A Now?

20 Q How do you feel now about it?

21 A I think they were, yes.

22 Q Have you heard of the customer-centered sales
23 approach?

24 A Yes.

25 Q Could you just briefly describe what you believe

1 that to be?

2 A That's where a customer is interviewed, and based
3 on the information you obtain from the customer, you make
4 recommendations for items or benefits that they could use
5 that we provide.

6 Q Do you recall a sales technique which preceded
7 that called the assumptive-sales technique?

8 A I don't recall anything that was called that, no.

9 Q Have you ever heard of the quick close?

10 A Yes.

11 Q Could you describe what that is?

12 A That's where a package is prepared where the
13 customer's told that this is the best service that we have,
14 and based on the information we've got, we feel like the
15 best service is what they need and it's itemized and a
16 monthly rate is quoted.

17 Q Would you tell all customers that that's -- that
18 was the best service that they need under that sales
19 technique?

20 A I don't remember.

21 Q Did it offer the customers a package of services?

22 A Yes.

23 Q Would you quote them individual prices or one
24 price for the whole package?

25 A One price.

1 Q Do you recall when that sales technique was
2 stopped being used by the company?

3 A I remember it -- as the next one being
4 customer-centered sales and services.

5 Q Do you remember what the switch-over point was?

6 A No, sir. I'm sorry.

7 Q Was the quick-closed technique allowed after
8 switching to the customer-centered sales approach?

9 A No.

10 Q Do you recall specifically being told to no longer
11 do the quick close?

12 A I don't -- no, just that this was what -- we went
13 through the training, customer-centered sales and services.
14 That's what we were using.

15 Q Have you been through ethics training by the
16 company in the last year or so?

17 A Yes.

18 Q Is that the only ethics training you've ever been
19 to or --

20 A Training?

21 Q Ethics training.

22 A Yes, right.

23 Q Do you think there's been a change in emphasis on
24 the company on ethics in the last year or two?

25 A I would -- Change?

1 Q Yes, or change in emphasis.

2 A Emphasis, yes. Change in emphasis, yes. I would
3 say that's a true statement.

4 Q Do you recall what bridging is?

5 A Yes.

6 Q Could you describe that?

7 A Bridging is where, based on a customer's call-in
8 for an un-sales related reason, you would -- the customer
9 may mention something that brings a light to you that they
10 may need a service that we provide. So you would discuss
11 that with the customer, based on a need you saw either on
12 their information on their account or what they said.

13 Q Were you required to bridge on all calls from
14 customers?

15 A No.

16 Q What types of calls would you not bridge on?

17 A Some that I remember would be, like, a disconnect
18 or if a customer was extremely upset for some reason or
19 irate, if you weren't talking to the customer themselves,
20 you were talking to somebody else.

21 Q If somebody called in with a problem or a question
22 about their billing, would you try to bridge on a call
23 like that?

24 A After the problem was solved, yes.

25 Q Were there any occasions where the company policy

1 told you to bridge on a call where you felt it was not
2 appropriate?

3 A Not that I recall.

4 Q Do you feel like you ever had to try to sell a
5 service to a customer who couldn't afford the service?

6 A No.

7 Q For example, an elderly customer on a limited
8 fixed income, did you ever feel it was inappropriate to try
9 to sell them some optional services?

10 A Not if they needed them.

11 Q Have you ever had occasions where customers called
12 in and told you that services were appearing on their bill
13 that they hadn't ordered?

14 A Yes.

15 Q How did you handle that?

16 A Well, you take care of the customer, satisfy their
17 question about it, investigate it a little bit and refer it
18 to a supervisor.

19 Q Would you actually take the service off or would
20 the supervisor do that?

21 A No, we would do that.

22 Q Were there any special reports you made on those
23 types of calls?

24 A No, just that anything of that type should be
25 referred to a supervisor.

1 MR. BECK: I think that's all I have. Thank you.

2 There may be others.

3 MS. WILSON: No questions.

4 MR. VINSON: No questions.

5 MR. BEATTY: That's it.

6 We'll read.

7 (Whereupon, the taking of the deposition was
8 concluded at 9:15 a.m.)

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CERTIFICATE OF OATH

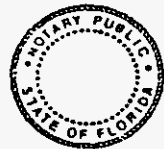
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STATE OF FLORIDA)
)
COUNTY OF VOLUSIA)

I, LISA L. TAYLOR, RPR-CP, Notary Public for the State of Florida at Large, do hereby certify that I did, at the time and place herein designated, place under oath the deponent, ELIZABETH MCKENZIE, who was thereupon examined.

I FURTHER CERTIFY that I am not of counsel for, related to, or employed by any of the parties or attorneys involved herein; nor am I financially interested in said action.

WITNESS MY HAND AND SEAL this 8th day of October, 1993, in the City of Daytona Beach, County of Volusia, State of Florida.



Notary Public, State of Florida
LISA L. TAYLOR
My Comm. Exp. Nov. 1, 1995
Comm. No. CC 153009

Lisa L. Taylor

LISA L. TAYLOR, RPR-CP,
Notary Public

My commission expires:
November 1, 1995

C E R T I F I C A T E

STATE OF FLORIDA)
COUNTY OF VOLUSIA)

I, LISA L. TAYLOR, RPR-CP, Court Reporter, do hereby certify that I did, at the time and place herein designated, record the testimony of ELIZABETH MCKENZIE, who was thereupon examined; that said testimony was recorded by me in shorthand; that the foregoing 14 pages constitute a complete and accurate transcript of said examination and proceedings.

I FURTHER CERTIFY that I am not of counsel for, related to, or employed by any of the parties or attorneys involved herein; nor am I financially interested in said action.

WITNESS MY HAND this 8th day of October, 1993, in the City of Daytona Beach, County of Volusia, State of Florida.

Lisa L. Taylor
LISA L. TAYLOR, RPR-CP,
Court Reporter

The foregoing instrument was acknowledged before me this 8th day of October, 1993, by Lisa L. Taylor, RPR-CP, who is personally known to me.

Lisa Renee Vinson
Notary Public,
State of Florida



Notary Public, State of Florida
LISA RENEE VINSON
My Comm. Exp. May 19, 1996
Comm. No. CC 202334

SUBSCRIPTION OF DEPONENT

STATE OF FLORIDA)
COUNTY OF VOLUSIA)

I, ELIZABETH MCKENZIE, do hereby certify,
having read the foregoing deposition taken on September 1,
1993, that said transcript is a true and accurate recording
of the proceedings had at the time and place designated,
with the following exceptions, if any:

ELIZABETH MCKENZIE

Date

Sworn to and subscribed before me this
day of , 1993.

Notary Public
My Commission expires:

ERRATA PAGE

I, the Deponent, wish to make the following
corrections:

Page Line Correction