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The Role of Empowerment in Crowdsourced Customer Service

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THE ROLE OF EMPOWERMENT IN CROWDSOURCED CUSTOMER SERVICE

BY

Stephen Kamanu Ichatha

A Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree

Of

Executive Doctorate in Business

In the Robinson College of Business

Of

Georgia State University

GEORGIA STATE UNIVERSITY

ROBINSON COLLEGE OF BUSINESS

2013

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ACCEPTANCE

This dissertation was prepared under the direction of the *Stephen Kamanu Ichatha's* Dissertation Committee. It has been approved and accepted by all members of that committee, and it has been accepted in partial fulfillment of the requirements for the degree of Executive Doctorate in Business in the J. Mack Robinson College of Business of Georgia State University.

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ABSTRACT

The Role of Empowerment in Crowdsourced Customer Service

BY

STEPHEN KAMANU ICHATHA

May 3rd, 2013

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For decades, researchers have seen employee empowerment as the means to achieving a more committed workforce that would deliver better outcomes. The prior conceptual and descriptive research focused on structural empowerment, or workplace mechanisms for generating empowerment, and psychological empowerment, the felt empowerment. Responding to calls for intervention studies, this research experimentally tests the effects of structural empowerment changes, through different degrees of decision-making authority and access to customer-relationship information, on psychological empowerment and subsequent work-related outcomes. Using a virtual contact center simulation, crowdsourced workers responded to customer requests. Greater decision authority and access to customer-relationship information resulted in higher levels of psychological empowerment which in turn resulted in task satisfaction and task attractiveness outcomes among the crowdsourced customer service workers.

CHAPTER 1

INTRODUCTION

Research Domain

In today's competitive environment, companies are constantly tasked with finding ways to reduce operational expenses. Containing costs while maintaining high levels of effectiveness and service quality however, continues to be a major challenge. In addition to the challenge of effectiveness and service quality in a financially-constrained work environment, companies must also be concerned with employee-work outcomes, such as job satisfaction and commitment to keep a strong workforce. In other words, companies have to delicately balance the business need of cost containment, customer needs for quality service, while ensuring good employee work experience.

Some companies have sought cost containment by outsourcing some of their tasks to vendors. The outsourced tasks usually comprise non-core tasks. For instance, a company whose core competency is manufacturing may outsource their human resources (HR) function to a vendor who focuses exclusively on HR functions or a wireless provider may opt to outsource its call center functions to a contact center vendor. The rationale for outsourcing HR functions includes financial savings, an increased ability for the organization to focus on strategic issues, access to technology and specialized expertise, and an ability to demand measurable and improved service levels (Belcourt, 2006). In fact, outsourcing of services often results in major financial savings to the company. For example, when BP outsourced its HR functions to Exult, it achieved a 40% reduction in HR staff, a reduction in operating costs of \$15 million a year, and the avoidance of funding \$30 million in capital costs for technology (Belcourt, 2006).

Outsourcing is therefore viewed as a very viable option by many executives. In a study by statisticsbrain.com, 35% of CFOs interviewed said they were outsourcing some of their services (statisticsbrain.com, 2012). The outsourced work was in diverse sectors including manufacturing, IT services, R&D, distribution, help centers, etc. and the number one reason for outsourcing was cost reduction or cost control. Surveys continue to show that nearly all organizations have outsourced parts of their HR functions (Gurchiek, 2005).

Outsourcing of work can take many forms. Traditional forms of outsourcing include sub-contracting of tasks, functions, or even entire departments to a vendor. The vendor may be one located domestically or overseas wherever an adequately qualified and trainable work force may be available. Task outsourcing can include temporary contracting to individuals and vendors. For example, a university may only choose to outsource the task of teaching some courses to an individual (adjunct instructor). Using a different outsource arrangement, a company can outsource only its payroll function to a vendor. For instance, ADP – a payroll vendor, provides shared payroll function to several companies. Companies may also choose to outsource an entire department, e.g. a financial institution may choose to outsource its call center department to an offshore vendor. In fact, when one calls a bank or financial institution, it's not surprising to find the call has been routed to an outsourced employee located in another part of the country – or sometimes – another part of the world.

Recently, however, a new wave of outsourcing is starting to gain traction. This type of outsourcing involves using the Internet to outsource work to an online workforce rather than through a vendor. The company solicits work by posting tasks to a public market place where anyone capable of completing the task can bid for and complete the task. This “public” outsourcing of tasks is called crowdsourcing, a term coined by Jeff Howe (Howe, 2006), and is

an alternative to the traditional vendor-driven outsource model. In crowdsourcing, the individual or company needing the service (the focal agent) broadcasts the request to individuals in a public forum. The individuals in the crowd self-select to solve the problem without an ex ante contract, and are paid upon satisfactory completion of the tasks required to meet the business need.

Crowdsourcing is the natural evolution of outsourcing in the era of social networks giving better economical returns (Vecchia & Cisternino, 2010) and has been used by many companies – especially those needing IT related services like programming, web design, etc. For example, rather than have its own scientists develop an algorithm internally to further improve its movie recommendation system, or contracting the development with a designated contractor, Netflix crowdsourced the task in an open call to the world (Afuah & Tucci, 2012). Users are motivated to solve problems by such needs or desires as money, altruism, building a reputation, demonstrating skills, or belonging to some group (Afuah & Tucci, 2012).

Whether the focal agent chooses to outsource using a traditional model, or to outsource using crowdsourcing, it is faced with the same issue of effectively monitoring the outcomes related to the outsource arrangement. These outcomes include task satisfaction - the level of positive feeling that the crowdsourced participants have about the tasks they perform, and task attractiveness – a measure of the likelihood that a crowdsourced participant would be willing to sign-up or recommend these crowdsourced tasks to others if they were offered on a regular basis.

Dissertation Question

Powered by widespread and increasing access to the Internet, mobile phones, and related communication technologies, the use of crowdsourcing – an Internet-based type of outsourcing- can help contain costs while simultaneously dynamically responding to the needs of the business. The practical problem, however, relates to how companies can adopt crowdsourcing of some of

its customer-related services, and achieve satisfactory levels of commitment among their crowdsourced employees as a way to ensure that the tasks requested by them are attractive enough for repeated self-selection.

One of the ways to achieve satisfactory levels of commitments is to ensure that employees are satisfied. It follows that having satisfied employees (even outsourced) helps reduce employee turnover, and can minimize costs incurred by constantly recruiting and (re) training employees. This is especially important in customer service where the crowdsourced employee is the “face” of the company and the crowdsourced contracts are ex-ante (Afuah & Tucci, 2012). Prior literature suggests that employee satisfaction leads to employee commitment. It therefore follows that companies that want to ensure the tasks they crowdsource are attractive enough for self-selection, need to create a work environment that increases job satisfaction. One of the ways to create this work environment is through employee empowerment. Employee empowerment has been used in prior literature to explore the relationship between employees and work related outcomes like job satisfaction. It follows that this relationship will exist in a crowdsourced context. Consequently the key research question is:

- Do changes in employee empowerment in a crowdsource customer service context affect work related outcomes of task satisfaction and task attractiveness?

Employee empowerment practices are aimed at helping employees feel confident, capable, and in control of the outcome of their work (Stack, 2010). Stack goes on to say that empowerment ensures commitment to the company's core mission and vision, which results in greater productivity over the long term. Just as companies want to keep good employees, they would want to encourage effective crowdsourced employees to continue to work for them. It therefore follows that empowerment may be a good lens to predict their work related commitment outcomes.

Research Perspective

This study used Kanter's theory of structural empowerment (Kanter, 1977) and Spreitzer's theory of psychological empowerment (Spreitzer, 1995) to explore their role in crowdsourced relationships. Structural empowerment is a macro-theory that describes the conditions of the work environment, and has been used in previous literature to identify organizational policies and practices that foster a sense of powerlessness so that these practices can be removed (Conger, 1989). Decision making authority and access to customer-relationship information are the structural empowerment variables that were used in this study. Previous research suggests however that structural empowerment alone does not fully capture the empowerment construct, and that for employees to feel committed to the tasks they perform, they need to feel good about the work they do. They need to find meaning in what they do, and they need to know that their work has impact. Also, being self-determined and feeling competent in what they do helps shape positive employee views of their work. Psychological empowerment has been studied as an outcome of structural empowerment, and addresses the employee's feelings of meaning, impact, self-determination and competence. The theory of Psychological Empowerment is a micro-theory and focuses on individuals and describes their psychological state given structural empowerment (Spreitzer, 1995).

Research Approach

Given the causal nature of this study (exploring the effect of empowerment on outcomes), we applied an experimental design. Experimental designs are usually considered the strongest of all designs in internal validity, and internal validity is at the center of all causal or cause-effect inferences (Trochim & Donnelly, 2008). Experimental designs also maximize internal validity of research studies by limiting the number of variables to be considered, bounding them in time,

and control for extraneous factors that can affect the observed results (Cammann, C., Fichman, M., Jenkins, G. D., Jr., & Klesh, J. R., 1983). We used crowdsourced employees as our participant pool, and response to wireless customer service billing disputes in a contact center as our task simulation. We then used structural empowerment and psychological empowerment theories to form an integrated framework that was used as a powerful lens to explore crowdsourced arrangements (Figure 1). The investigation then examined the relationship between structural empowerment and psychological empowerment and their effects on task satisfaction and task attractiveness among the crowdsourced customer service representatives.

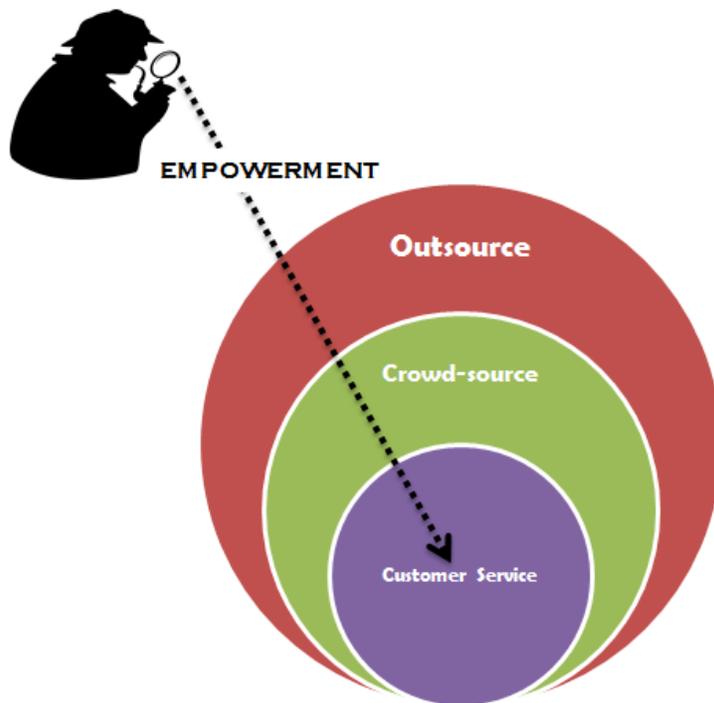


Figure 1 – Research approach

Structural Empowerment

The structural empowerment approach focuses on identifying and remedying organizational policies and practices that cause powerlessness (Conger, 1989). Powerlessness in organizational

context may include lack of decision making latitude that would impair an employee's ability to properly respond to a customer. Empowerment strategies can then be used to remove them. One such empowerment strategy can be explored by Kanter's structural empowerment theory. Kanter (1977) authored the seminal study of social-structural theory of empowerment, *Men and Women of the Corporation*, in an ethnographic study of an industrial organization. Kanter's original research has now served as the foundation of the large body of empowerment research from a social-structural perspective (Spreitzer, 2007). In her book, Kanter concluded that power in organizations was derived from structural conditions in the work environment, not from an individual's personal characteristics or socialization effects. Kanter proposed that empowerment was promoted in work environments that provide employees with access to information, resources, support, and the opportunity to learn and develop. These structural empowerment variables give employees power - defined by Kanter as "the ability of individuals to get things done" (Laschinger, 2001). Kanter's structural empowerment theory has been used in academic literature to describe the conditions of the work environment.

Psychological Empowerment

An argument could be made that structural empowerment (alone) is not enough to influence work-related outcomes because it does not explore or measure how employees feel about or react to structural empowerment policies. Although Kanter argued that the impact of structural empowerment was far greater than an employee's own personality characteristics (Vacharakiat, 2008), Spreitzer (1995) countered that psychological empowerment was just as important, and was needed to further explore how employees actually think about and experience their work. Spreitzer called this the theory of psychological empowerment. Psychological empowerment is defined as the psychological state that employees must experience for empowerment

interventions to be successful, and is a logical outcome of managerial efforts to create structural empowerment (Vacharakiat, 2008).

Psychological empowerment has its roots in early work on employee alienation and quality of work life, and refers to a set of psychological states that are necessary for individuals to feel a sense of control in relation to their work (Spreitzer, 2007). Spreitzer used four components to develop and validate a multidimensional measure of psychological empowerment in the workplace: meaning of the work, competence to do the work, self-determination, and employee's perception of the impact or outcomes of their work (Vacharakiat, 2008).

Kanter's (1993) theory of structural empowerment and Spreitzer's (1995) theory of psychological empowerment were used to help shape the conceptual framework of this study. They have been used as an integrated model in prior literature (Laschinger, 2001). Integrating these perspectives, employers who want employees to experience better work outcomes (i.e., satisfaction) would identify changes in policies or practices related to the structure of work (i.e., structural empowerment), that lead to psychological, or felt, empowerment.

CHAPTER 2

LITERATURE REVIEW

Crowdsourcing

In a globally competitive environment where acute competition, new information technologies, and emerging customer demands are increasingly redefining business environments (Mathiassen & Vainio, 2007), companies are forced to face the challenge of cost containment. Reducing operational expenses gives companies the competitive edge needed to survive in this globally competitive environment. Some companies have risen to the cost containment challenge by outsourcing some of their tasks as outsourcing of services often results in major financial savings to the company, and in fact surveys continue to show that nearly all organizations have outsourced parts of their HR functions (Gurchiek, 2005).

Crowdsourcing is the natural evolution of outsourcing in the era of social networks giving better economical returns (Vecchia & Cisternino, 2010) and has been used by many companies – especially those needing IT related services like programming, web design, etc. This type of outsourcing involves using the Internet to outsource work to the general population (versus using a specific vendor). This “public” outsourcing of tasks is called crowdsourcing, a term coined by Jeff Howe, and is an alternative to the traditional vendor driven outsource model in that the company solicits work by posting tasks to a public market place where anyone capable of completing the task can bid for and complete the task. Howe went on to describe crowdsourcing as “outsourcing on steroids”.

Definition and History

Crowdsourcing is a relatively new term, but Lynch (2010) suggests that the process of crowdsourcing was invented as early as 1714 when the British Government offered £20,000 for

people to invent a solution to the "Longitude Problem" which made sailing difficult and perilous. The contest, considered almost unsolvable, was won by John Harrison, the son of a carpenter. Harrison invented the 'marine chronometer' (i.e. an accurate, vacuum sealed pocket watch). This example of crowdsourcing highlights one of the principles of crowdsourcing - innovation and creativity can come from anywhere. Most people associate crowdsourcing with Wikipedia. Although Wikipedia does not meet the requestor/worker nature of crowdsourcing, an argument can be made that it is crowdsourced knowledge (Lynch, 2010)

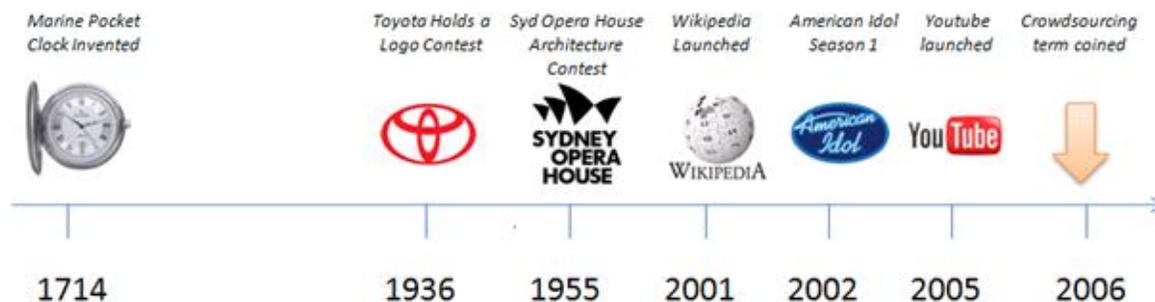


Figure 2 – The History of crowdsourcing

Crowdsourcing is the act of outsourcing a task to a “crowd,” rather than to a designated “agent” (an organization, informal or formal team, or individual), such as a contractor, in the form of an open call (Howe, 2006, 2008; Jeppesen and Lakhani, 2010), and Howe coined the term crowdsourcing with the strong role of the Internet in mind (Howe, 2006, 2008). Howe went on to argue that crowdsourcing works because it uses the online community, and that online communities work because they are self-policing. People get things done in a community by persuasion and collaboration rather than by issuing edicts. He argued that humans generally function better in that kind of environment rather than in rigid hierarchies where freedom of thought and expression is actively discouraged. The power of crowdsource is the ability to scale the work of a person who has a few spare hours to devote to a project and therefore can’t

realistically achieve all that much, to a hundred thousand people pooled in their spare time in a collaborative community initiative. In an employment situation, financial incentives are all important. In a community environment, recognition and the respect of others can be far more motivational (Howe, 2008). People also respond well to competitions where they have the opportunity to show off their expertise. Howe posited that almost certainly crowdsourcing will dramatically change the nature of work and creativity in the future as it continues to make previously scarce resources become much more abundant. This will change what customers are willing to pay for in a dramatic way and will likely have very far reaching implications. Howe summarized the power of crowdsourcing as follows:

“Given the right set of conditions, the crowd will almost always outperform any number of employees – a fact that companies are becoming aware of and are increasingly attempting to exploit. That, in a nutshell, is what crowdsourcing is about”.

– Jeff Howe

How crowdsourcing works

The process in Figure 3 describes how crowdsourcing generally works. A requestor submits a request to a crowdsourcing platform. This request is called a HIT (Human Intelligence Task) by MTurk, and requires the requestor to describe in detail the scope of the request, and the pay. The requestor can specify the rating of the worker – e.g. 95% rating means the worker has a good rating amongst requestors. The requestor can also specify whether the work should be done in the US only (versus) issuing the work to a global workforce. Finally, the requestor must fund their account with the money required to complete the task. The money is held in escrow and

will only be paid out to the worker if they complete the work successfully i.e. requestor approves the work. Upon completion of the work and subsequent payment for service, the worker gets a favorable rating for work completion. If the work does not meet the requirements, the requestor can reject the work and not pay for the service. Rejection of work has a negative effect on the ratings of both the requestor and the worker.



Figure 3 Crowdsourcing recruitment

When to crowdsource

Tucci and Affua argued in their 2012 article – “Crowdsourcing as a solution to distant search” that under certain circumstances crowdsourcing transforms distant search into local search, improving the efficiency and effectiveness of problem solving. Under such circumstances a firm may choose to crowdsource problem solving rather than solve the problem internally or contract it to a designated supplier. In crowdsourcing, each agent is motivated to solve problems by such needs or desires as money, altruism, building a reputation, demonstrating its skills, or belonging to some group; the need or desire need not be solely monetary. Tucci described the crowdsourcing process as one where the focal agent broadcasts the problem to the crowd, just as is often the case with designated contracting. However, the focal agent does not evaluate each potential candidate to choose a qualified one, as is the case with designated contracting. Rather, some members of the crowd self-select to solve the problem without an ex ante contract. Tucci

went on to explain that the extent to which potential solvers from a crowd are able to self-select and solve a problem is a function of both how the problem is defined and the extent to which potential solvers have access to it. For successful crowdsourcing to take place without an ex ante contract, potential solvers within the crowd need to be motivated enough to self-select to solve the problem, and at least one potential solver needs to be good enough to solve the problem or one of its modules. Thus, the probability that a focal agent will crowdsource a problem also depends on the characteristics of the crowd. Tucci concluded that under certain circumstances crowdsourcing transforms distant search into local search, thereby enabling firms to take advantage of the many benefits of distant search without having to endure many of its costs. Thus, crowdsourcing may be a better mechanism for solving some problems than internal sourcing or designated contracting.

MTurk is just one of the many crowdsource platforms available. Others include: iStockphoto, crowdsource, designcrowd, elance, and freelancer.

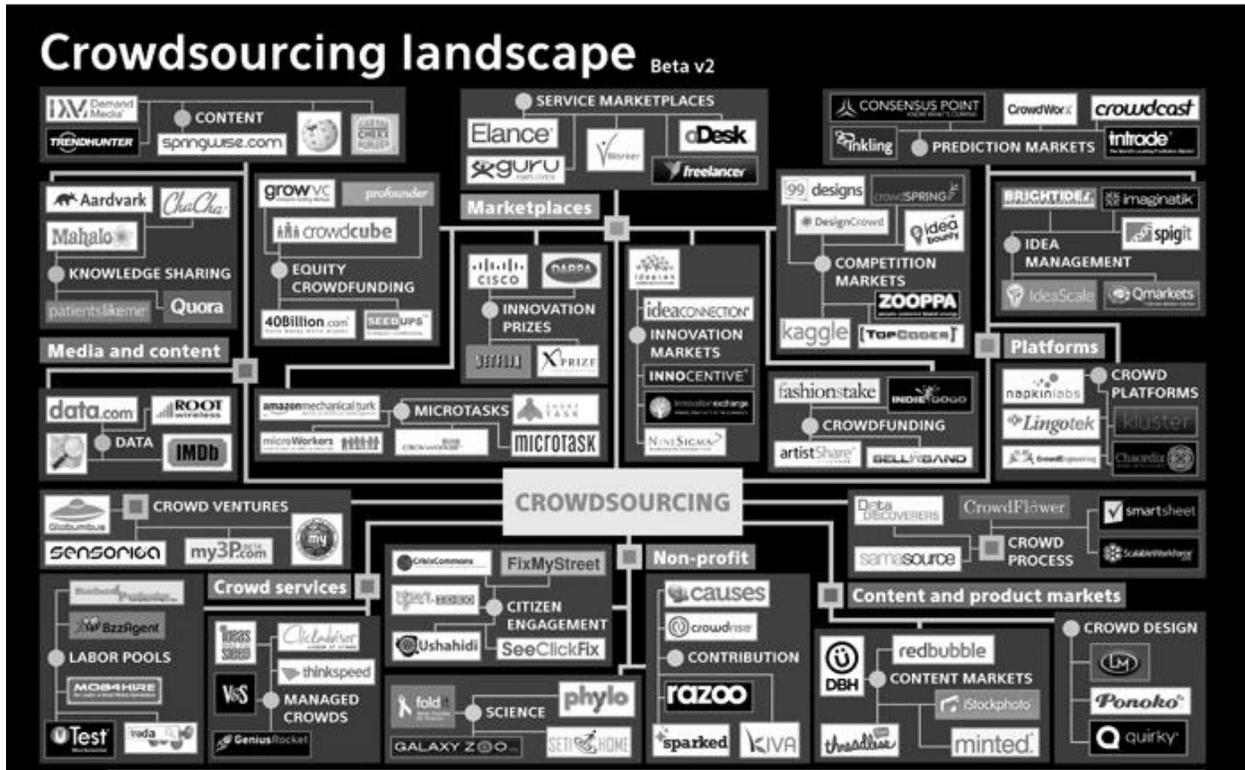


Figure 4 - Crowdsourcing landscape

Benefits of crowdsourcing

There are compelling case studies of firms using crowdsourcing to perform innovation tasks and gain a competitive advantage. Below are some success stories as told by MTurk’s customers:

“Axiom Corporation was able to reduce transcription and outsourcing costs by 50% using Amazon Mechanical Turk”

“AOL uses Mechanical Turk to categorize content on its various web properties, identifying opportunities to expand video utilization and increase video advertising revenue”

“Mechanical Turk Workers translated 1.5 million words of Arabic, which allowed DARPA to build their social media translation database in 8 weeks”

Crowdsourcing benefits individuals and sole proprietors as well. Chris Macharia – a sole proprietor - recognized incredible savings when he crowdsourced an IT task. He spent \$4,500 to have a crowdsourced company work on this project for about 4-6 months. The cost came to less than \$10 a hr., and although the relationship was largely managed through email the quality was excellent, the communication was good, the company was professional, and they followed all the best practices and standards that he knows from being in the IT profession. Paying an experienced US-based contractor would have had to be at least \$25 an hour, and the timeline would probably have been similar. He, however, strongly recommends that anyone doing crowdsourcing have some internal expertise to at least manage the quality of the deliverables from that relationship.

Crowdsourcing benefits workers as well as requestors. Below are some quotes from Elance workers:

"Even though I travel half of the year, I can continue working on the road thanks to Elance."

"Elance has given me a family life, allowing me to work for Fortune 500 companies and still spend time at home."

"Elance is a fun way to gain career experience and make extra money while I go to college."

"I get jobs that specifically fit my skills, and I interact with really, really talented people around the world."

Amazon Mechanical Turk

Micro-task markets, such as Amazon's Mechanical Turk, offer a potential paradigm for engaging a large number of users for low time and monetary costs. There are monetary costs of acquiring participants, observers, and equipment; in addition, some techniques are more time

intensive than others (Kittur & Chi, 2008). Amazon Mechanical Turk is a marketplace for work that requires human intelligence. The Mechanical Turk service gives businesses access to a diverse, on-demand, scalable workforce and gives workers thousands of tasks which they can choose to complete whenever it's convenient (Amazon, 2012). Amazon's Mechanical Turk is a market in which anyone can post tasks to be completed and specify prices paid for completing them. The inspiration of the system was to have human users complete simple tasks that would otherwise be extremely difficult (if not impossible) for computers to perform. Tasks in MTurk typically require little time and effort, and users are paid a very small amount upon completion (often on the order of a few cents), and in March 2007, Amazon claimed the user base of Mechanical Turk (who commonly refer to themselves as "turkers") consisted of over 100,000 users from over 100 countries. In 2011, over 500,000 registered workers from over 190 countries worldwide, and prides itself as the crowdsourcing platform that gives businesses and developers "access to an on-demand, scalable workforce" with flexibility, accuracy and speed (Amazon, 2012).

Critics of crowdsourcing

Because completing microtasks are paid per task, one of the criticisms of crowdsourcing is that there is often a financial incentive to complete tasks quickly rather than well. Verifying responses is time-consuming, and so requesters often depend on having multiple workers complete the same task to correct errors (Ipeirotis, Wang, & Provost, 2010). One of the problems of crowdsourcing products is the lack of interaction between the crowd and the client, and there is usually little information about the final desired product, and there is often very limited interaction with the final client. This can decrease the quality of product because client interaction is a vital part of the design process. Unfortunately, since manually verifying the

quality of the submitted results is hard, malicious workers often take advantage of the verification difficulty and submit answers of low quality (Ipeirotis, Wang, & Provost, 2010).

The other criticism is the ethical concern regarding wage. Crowdsourced workers are considered independent contractors rather than employees, and are not guaranteed a minimum wage. This offers an ethical concern due to the possible exploitation of workers by requestors. In fact, workers using MTurk generally earn less than the minimum wage (Ross, J, Irani, L, Silberman, M.S., Zaldivar, A and Tomlinson, B, 2010).

Empowerment

The word “empower” simply signifies to give power to someone (Wörlein, 2010). Empower originally meant “to invest with legal power, to authorize” (Vacharakiat, 2008) and the Merriam Webster's Dictionary reflects this, describing the verb to empower as "to authorize or delegate or give legal power to someone". In academic and management literature, empowerment is a construct used to explain organizational effectiveness (Conger, 1989). Smith (1996) explained that empowering people was encouraging them to become more involved in the decisions and activities that affect their jobs. Empowerment practices are often implemented with the hopes of overcoming worker dissatisfaction and reducing the costs of absenteeism, turnover, poor quality work, and sabotage (Klein, Ralls, Smith-Major, & Douglas, 1998), enhancing employees’ sense of personal power and allowing them to delight their customers (Lashley, 1995). Stewart (1994) explained empowerment as a highly practical and productive way to get the best out of oneself and one’s staff, and in a review of more than 20 years of research on empowerment at work, Spreitzer (2007) found that empowerment has been shown to affect job-related outcomes (i.e., job satisfaction, organizational commitment, work performance, productivity).

Over the last two decades, two complementary perspectives on workplace empowerment have emerged (Liden & Arad, 1996). The first is more macro, focusing on the social-structural (or contextual) conditions that enable empowerment in the workplace, while the second is more micro, emphasizing the felt or psychological experience of empowerment at work (Spreitzer, 2007).

Structural Empowerment

The social-structural perspective focuses on how organizational, institutional, social, economic, political, and cultural forces can root out the conditions that foster powerlessness in the workplace (Liden & Arad, 1996). Structural empowerment then is the mechanism by which empowerment is achieved by identifying organizational policies and practices that foster a sense of powerlessness and implementing strategies and tactics that can be used to remove them (Conger & Kanungo, 1988). Kanter's (1977) seminal ethnographic study of social-structural theory of empowerment in an industrial organization, *Men and Women of the Corporation*, has now served as the foundation of the large body of empowerment research from a social-structural perspective (Spreitzer, 2007). Defining power as "the ability of individuals to get things done" (Laschinger, 2001), Kanter concluded that power in organizations was derived from structural conditions in the work environment, not from an individual's personal characteristics or socialization effects. In a study of empowerment effect on nurses, Laschinger argued that when situations were structured so that employees felt empowered, they would respond accordingly and rise to the "challenges" present in their organization. The organization was likely to benefit in terms of both improved employee attitudes and increased organizational effectiveness (Laschinger, 2001). To create empowerment on a sustained basis (Bowen & Lawler, 1995),

structural organizational policies, practices, and structures must be examined and changed so as to lead to feelings of empowerment (Seibert, 2004).

Holding all other variables constant, structural empowerment is the power to create and sustain a work environment by providing the ability to access and mobilize opportunities, information, support, and resources from one's position in the organization (Kanter, 1993). Vacharakiat (2008) defined the components of structural empowerment as follows: *Access to opportunity* includes the expectation of positive future prospects, growth, and a chance to learn and grow. *Access to information* includes the organization's overall goals and values - this includes information directly related to employees' work, as well as information about the organization as a whole. *Access to support* includes the feedback and guidance received from superiors, peers, and subordinates about an employee's job. *Access to resources* is the time necessary to accomplish organizational goals and includes acquiring help when needed, and to material, money, and rewards necessary for achieving the demands of the job (Laschinger, 2001). It follows, and research supports, that when employees are given access to opportunities, information, support, and resources, and the ability to mobilize them as needed, employees gain empowerment (Kanter, 1993).

Although structural empowerment can influence both the organization and the employee, it simply describes the conditions of the work environment. It does not describe the employee reaction to these conditions (Laschinger, 2001). The structural empowerment perspective is limiting because it does not address the nature of empowerment as experienced by employees (Spreitzer, 2005). This has prompted the emergence of another empowerment construct – psychological empowerment.

Psychological Empowerment

The psychological perspective of empowerment is defined as the psychological state that employees must experience for empowerment interventions to be successful and. This is a logical outcome of managerial efforts to create structural empowerment conditions (Laschinger, 2001) With its roots in early work on employee alienation and quality of work life, psychological empowerment refers to a set of psychological states that are necessary for individuals to feel a sense of control in relation to their work (Spreitzer, 2007). Later, Thomas and Velthouse (1990) re-conceptualized empowerment as a multidimensional construct by defining psychological empowerment as intrinsic task motivation consisting of four dimensions - felt meaning, impact, self-determination, and competence - and suggested that these reflect self and task assessments that combine to form a motivational effect on the choice to engage and persist in work-related behavior. According to Spreitzer (2005), the four psychological empowerment dimensions should reflect an active, rather than passive, orientation to one's work role. *Meaning* involves a fit between the needs of one's work role and one's beliefs, values and behaviors (Hackman & Oldham, 1980). *Impact* is the degree to which one can influence strategic, administrative, or operating outcomes at work (Ashforth, 1989). The potential to have real impact gives people a reason to take the risk in the first place. *Self-determination* helps people to feel in control of their own destiny, facilitating the potential for risk taking. It is a sense of choice in initiating and regulating one's actions (Deci, Connell, & Ryan, 1989), and reflects autonomy over the initiation and continuation of work behavior and processes (e.g., making decisions about work methods, pace, and effort) (Bell & Staw, 1989). *Competence* refers to self-efficacy specific to one's work, a belief in one's capability to perform work activities with skill

(Gist, 1987; Bandura, 1989). The feelings of competence that empowerment affords gives people the confidence to take on difficult task.

Spreitzer (1995) found wide support for these same four dimensions in academic literature and presented evidence that the four dimensions, although distinct, reflect an overall psychological empowerment construct. In other words, the experience of empowerment is manifest in all four dimensions – if any one dimension is missing, then the experience of empowerment will be limited (Spreitzer, 2007).

Psychological empowerment literature has thus focused on articulating the empowerment process and the psychological underpinnings of the empowerment construct (Conger & Kanungo, 1988; Spreitzer, 1995, 1996; Spreitzer, Kizilos, & Nason, 1997; Thomas and Velthouse, 1990; Spector, 1986). Psychological empowerment is then a mindset that employees have about their role in the organization (Spreitzer, 1997). In this sense, it refers to a set of psychological conditions necessary for individuals to feel in control of their own destiny.

Outcomes of Empowerment

Structural empowerment operates at a macro level and is used by organizations as a lever to elicit the micro-level psychological empowerment manifested by meaning, impact, competence, and self-determination. Empowered employees reporting high job satisfaction has been consistent across a large number of studies for both individuals (e.g., Aryee and Chen, 2006; Carless, 2004; Koberg et al., 1999; Liden et al., 2000; Seibert et al., 2004; Sparrowe, 1994) and teams (Kirkman & Rosen, 1999). Empowered employees also report higher levels of organizational commitment (Avolio, et al. 2004; Liden et al., 2000) and less propensity to turn over (Sparrowe, 1994; Koberg et al., 1999). Empowered employees also reported less job strain (Spreitzer, Kizilos & Nason, 1997). Empowerment is not only related to positive work attitudes,

it has also been found to be related to positive work performance – more specifically, managerial effectiveness (Spreitzer, 1995), employee effectiveness (Spreitzer et al., 1997), employee productivity (Koberg, et al., 1999), and newcomer role performance (Chen & Klimoski, 2003). Employees who feel more empowered are more motivated to perform effectively (Chen et al., 2007; Chen & Klimoski, 2003; Liden et al., 2000; Seibert et al., 2004). In summary, employee empowerment, if implemented correctly at the work environment level has been theoretically shown to elicit psychological states that result in work related outcomes.

Critics of Empowerment

Critical and postmodern empowerment scholars often argue that empowerment is a ruse the managers use to get more out of their employees without increasing wages or real power (Spreitzer, 2007). Bartunek and Spreitzer (2006) found that as the meaning of the term empowerment has evolved over time; it has focused more attention on issues of fostering productivity and less on enabling human or societal welfare.

Summary

After reviewing the crowdsourcing and empowerment literature, this dissertation intended to make a meaningful contribution to both. Little was known about how crowdsourced relationships are nurtured in order to positively impact work related outcomes. We used an integrated model comprising of structural empowerment theory and psychological empowerment theory to explore the relationships between the crowdsourced employees and the structures put in place by the focal agent to allow them to do their work, be effective, and be satisfied enough to self-select the task should it become available again. The scarcity of academic literature in crowdsourcing positioned this study to be a contributor to the empowerment domain. Following a call by Kanter

to give frontline employees empowerment, this study responded by creating an experiment where both decision authority and access to additional customer information were manipulated.

“give front-line service workers more flexibility to respond to situations as they arise rather than expecting automatic obedience to rules...give them more command over resources, to be used to solve customers' problems, to give customers amenities or refund their money...give them access to information so they can deal effectively in one step with customer needs” (Kanter, 1993)

In addition to the gap in crowdsource and empowerment literature, this study offered us the opportunity to conduct an experiment where we could give the crowdsourced employees a “real-world” task. In her 2001 study, Laschinger called for empowerment to be tested in an intervention study where the work conditions were actually changed to be more empowering. The attitudes and behaviors could then be compared to a control group that did not receive the intervention.

In this dissertation, we examine the crowdsource relationship using the empowerment lens. In academic and management literature, empowerment has been viewed as a construct used by theorists to explain organizational effectiveness (Conger, 1988). Smith (1996) explained that empowering people was encouraging them to become more involved in the decisions and activities that affect their jobs. Empowerment practices are often implemented with the hopes of overcoming worker dissatisfaction and reducing the costs of absenteeism, turnover, poor quality work, and sabotage (Klein, Ralls, Smith-Major, & Douglas, 1998). Empowerment enhances employees' sense of personal power and allows them to delight their customers (Lashley, 1995). In fact, more than 70 percent of organizations have adopted some kind of empowerment initiative for at least part of their workforce (Lawler, Mohrman & Benson, 2001).

While an argument could be made that crowdsourcing is unlikely to be a one-size fits all solution for cost-containment using outsource models, it will no doubt offer an alternative for some services. In fact, a number of companies including Hewlett-Packard, W. L. Gore & Associates and Visa International, are aggressively decentralizing their decision making processes, and the boundaries which once existed between firms, customers, contractors and suppliers are becoming porous (Howe, 2008). Given this surge in decentralization, crowdsourcing will quickly pick up pace. Thus it is important to understand how to create a crowdsource environment, and how to nurture the crowdsource relationship.

If crowdsourcing continues to gain popularity and consequently crowdsourced employees become part of a company's workforce, then empowerment structures may serve the same purpose for crowdsourced employees as they do for non-crowdsourced employees. Crowdsourced employees may respond to these empowerment structures in the same way as their non-crowdsourced counterparts, and these feelings may translate to employee commitment work outcomes.

CHAPTER 3

CONCEPTUAL MODEL AND HYPOTHESES

Conceptual Model

Laschinger (2001) used an expanded model of Kanter's structural empowerment, which specified the relationships among structural and psychological empowerment, job strain, and work satisfaction (Figure 5). She created an overall structural empowerment construct that was derived from measures of formal power, informal power and perceived access to the work empowerment structures of opportunity, information, support, and resources as specified in Kanter's original model. In her model, psychological empowerment was measured reflectively using Spreitzer's 12-item Psychological Empowerment scale. In a survey of 404 Canadian staff nurses, she showed that nurses felt that structural empowerment in their workplace resulted in higher levels of psychological empowerment, and these heightened feelings of psychological empowerment in turn reduced job strain and increased work satisfaction. Laschinger called for testing her model in an intervention study in which conditions were changed to be more empowering.

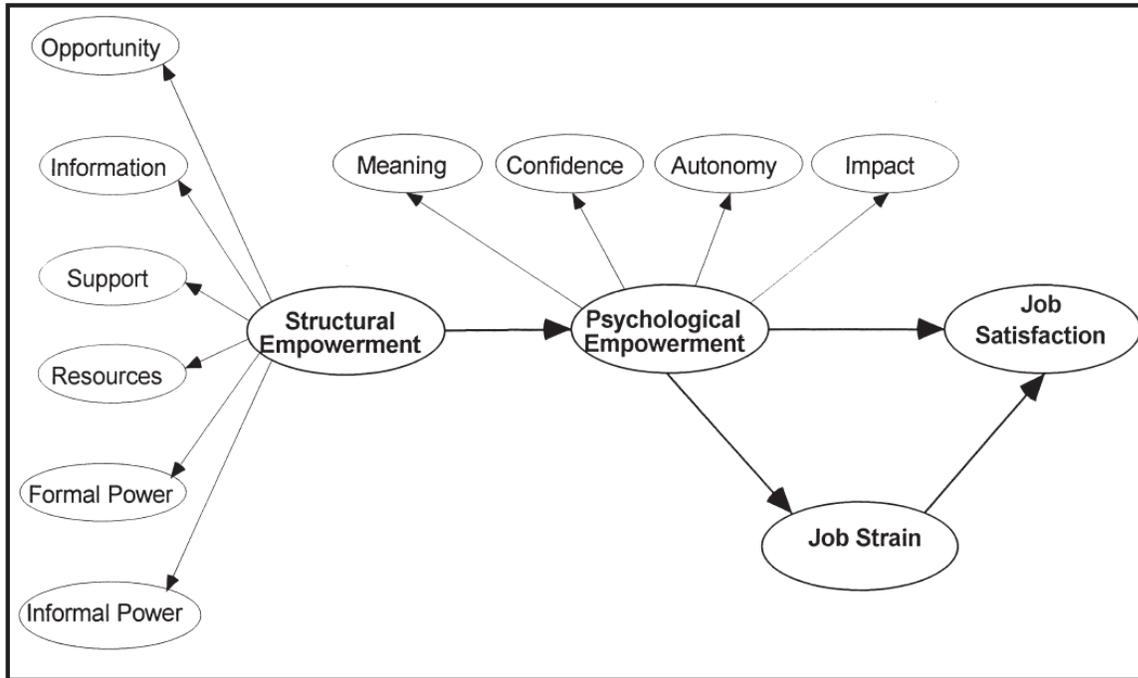


Figure 5 Laschinger's Integrated Empowerment model

Vacharakiat (2008) also used an integrated model to examine the relationship between structural empowerment and psychological empowerment to job satisfaction and organizational commitment among Filipino and American-born nurses working in the United States. She used the structural empowerment theory by Kanter (1993) and the psychological empowerment theory by Spreitzer (1995) as the conceptual framework (Figure 6).

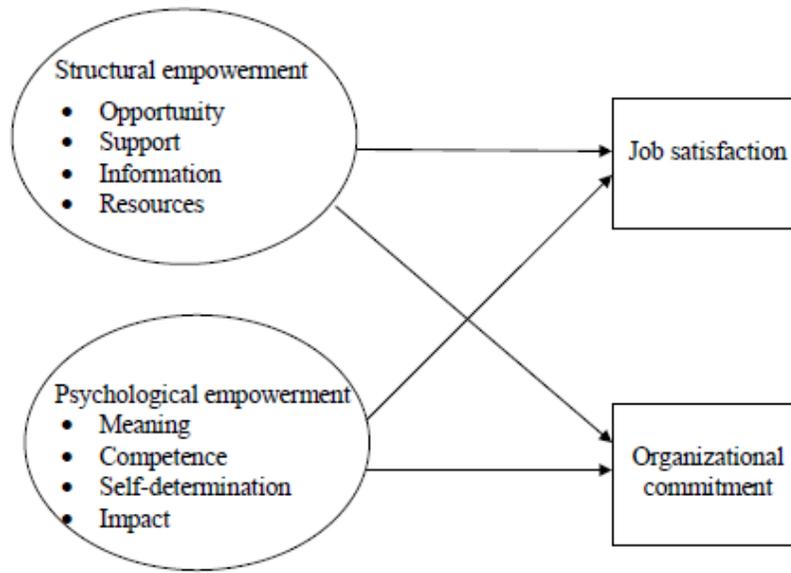


Figure 6 Vacharakiat’s Integrated Empowerment model

In her study, 192 participants (Filipino and American nurses) completed surveys including the Conditions of Work Effectiveness Questionnaire II developed by Laschinger, and the Psychological Empowerment instrument developed by Spreitzer. Vacharakiat found correlations between structural empowerment, psychological empowerment, and job satisfaction among Filipino and American nurses, and concluded that structural empowerment, psychological empowerment, job satisfaction, affective commitment, and normative commitment were positively correlated with each other in both the Filipino and the American registered nurses groups.

These studies examined empowerment using surveys on existing workforces i.e. nurses. Although this dissertation adopted Laschinger and Vacharakiat’s integrated frameworks, we experimentally manipulated structural conditions – specifically decision authority and access to customer-relationship information - to test their effects on psychological empowerment and subsequently on job-related outcomes in a crowdsourced customer service context. Since this was a crowdsourcing context, where workers self-selected tasks in an ex-ante contract arrangement, access to opportunity, company information, and support did not apply as they

would in a traditional employee/employer relationship. Access to these empowering structures is facilitated by formal job characteristics, and assumes that the employee has a traditional working relationship with employer. In our experiment and in this crowdsourcing context, the workers would not have data of the organization's overall goals and values, or participate actively in the organization's decision processes (access to information dimension). There was no feedback loop or guidance system from superiors and peers that would be typical of a traditional employee/employer setting (access to support). The crowdsourcing environment does not lead workers to expect regular future opportunities or the chance to learn and grow (access to opportunity).

Our model included Kanter's structural empowerment dimension of access to resources. Kanter described this dimension as having access to resources necessary to do the job. In the context of our experiment, the resources needed to do the job meant having access to customer-relationship information. Also, according to Kanter, empowerment can be derived from having power in jobs that allow for discretion in decision making (Kanter, 1993). In the context of our experiment, both access to customer-relationship information, and decision making authority were used to represent structural empowerment.

The experiment was built on Biron's (2010) study, which used a simulated customer contact center to test structural empowerment on role overload and emotional exhaustion. In his study, participants were asked to assume the roles of customer service agents and address matters and confront situations typically handled by such agents. Specifically, participants were assigned to either broad-scale empowerment, selective, and no empowerment determined by the opportunity to express their preference for the type of 'customers' they preferred to serve. In

Biron's study, selective empowerment generated lower levels of role overload and emotional exhaustion, and higher levels of service quality productivity compared to broad empowerment.

Hypotheses

According to Kanter, "to empower" literally means "to give power" (Kanter, 1993). Also according to Kanter, overall empowerment can be derived from having power in jobs that allow discretion in decision making (Kanter, 1993). and because in our experiment (and in the context of crowdsourcing), access to opportunity, information, and support do not apply (because the employee/employer relationship is not a traditional one where such access can be afforded), we only used access to resources in our model and operationalized it as having access to customer-relationship information to help workers do their job.

In Laschinger's (2001) study, structural empowerment in workplace resulted in higher levels of psychological empowerment. Integrating these findings in our model where structural empowerment comprised of decision making authority and customer to access information, we postulate the following:

H1: The more decision-making authority a person has the greater their psychological empowerment.

H2: The more access to customer-relationship information a person has the greater their psychological empowerment.

Work by Laschinger (2001), and Siebert (2010) was particularly relevant to our research. They both presented psychological empowerment as a single overall construct composed of four distinct sub-dimensions: meaning, competence, self-determination, and impact, and modeled it as a mediator of the relationship between structural empowerment and employee outcomes of job satisfaction. Both studies concluded that by increasing access to workplace empowerment

structures, employees' experienced feelings of personal empowerment that, in turn, increase job satisfaction. As such it is hypothesized:

H3a: Psychological empowerment will mediate the relationship between decision authority and task satisfaction.

H3b: Psychological empowerment will mediate the relationship between access to customer-relationship information and task satisfaction.

Bordin (2007) concluded that there was a significant positive relationship between empowerment and job satisfaction. Because we used a crowdsourced workforce for our experiment, and the job they were given consisted of a set of tasks, we changed the outcome descriptions of "job" to "task," because it is a better reflection of the set of tasks that we used in the experiment. We defined task satisfaction as the positive feeling that the crowdsourced participants felt about the tasks they performed. Building on Bordin's study and other empowerment literature, it was hypothesized that:

H4: Psychological empowerment will be positively related to task satisfaction.

Laschinger's study also concluded that increasing access to workplace empowerment structures gave employees feelings of personal empowerment that in turn reduced job strain. In our experiment, job stress outcome was modified to task stress, and was defined as the response of the crowdsourced worker to the stress experienced in the performance of the tasks. We therefore hypothesize:

H5 Psychological empowerment will be negatively related to task stress.

Numerous research studies have shown that job satisfaction is negatively related to turnover. In a review of 88 studies, Tett and Meyer (1993) concluded that job satisfaction is negatively related to turnover intention. As our study was exploring whether crowdsourced employees would be attracted enough to a task to self-select it again, we measured this outcome as task attractiveness and defined it as "the likelihood that crowdsourced participants would be

willing to sign-up or recommend these tasks to others if they were offered on a regular basis.” In our study, it is hypothesized that:

H6: Task Satisfaction will be positively related to task attractiveness.

Figure 7 was created to model the relationships, and an experiment with adapted definitions (and measures) taken from prior literature with established construct validity was conducted to test the hypotheses. In addition to the independent, mediator and dependent variables, we collected trait measures as controls to see whether they affected psychological empowerment which would in turn affect task satisfaction.

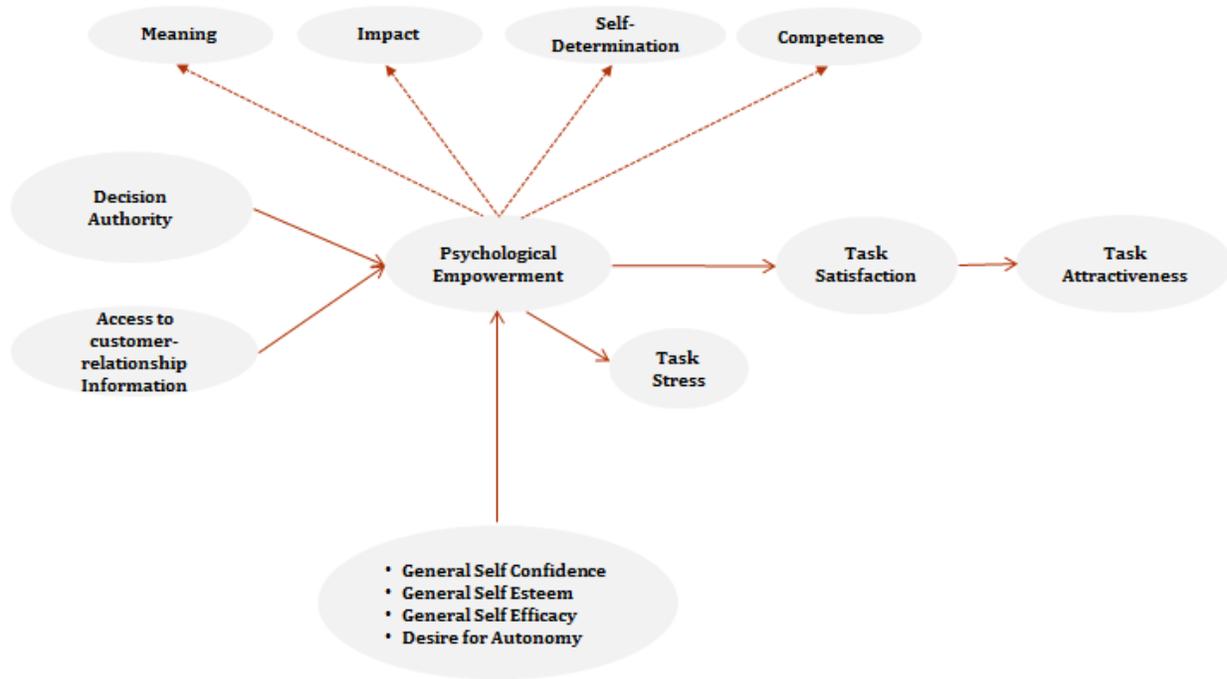


Figure 7 Research model

CHAPTER 4

RESEARCH METHODOLOGY AND DATA COLLECTION

Research Design

The study was an experiment which examined the effects of three levels of decision authority and two levels of access to customer-related information on psychological empowerment and subsequently on work-related outcomes, task satisfaction and job stress. Decision authority was defined as the latitude given to crowdsourced workers to respond to customer requests without relying on supervisors. Specifically, decision authority was manipulated at three levels (high, medium, and low). Access to customer-relationship information was defined as the amount of information that crowdsourced participants are allowed to view. This information was not account related information, but rather additional customer-related information that dealt with customer history and the customer's relationship with the provider. This information was provided to some groups to help them make more informed refund decisions. This construct was manipulated at two levels (available and not available).

The purposes of the dissertation were: to examine the relationships between empowerment, task satisfaction, and task commitment in crowdsourced customer service. The questions used in the study were the following: what are the relationships between structural empowerment, psychological empowerment, task satisfaction, and task attractiveness among crowdsourced customer service workers? Are there any differences between the effects of decision authority and access to customer-relationship information manipulations on psychological empowerment and The research design of the study was a field experiment, and the data were obtained from crowdsourced customer service workers in the United States.

Method

To test the hypotheses, we designed a field experiment structured around a simulated customer contact center in which participants were required to respond to customer cell phone billing refund requests. Simulations answer recent calls for experimental designs that are able to test causal hypotheses in ways that maximize both internal and external validity (Colquitt, 2008; Scandura and Williams, 2000), so this was an ideal method to test the relationships. The experiment was designed to provide a reasonable number of independent individual decisions under a range of decision authority and access to customer-relationship information conditions. The participants were crowdsourced from the MTurk job site (as compared to the survey site), by setting up the job using a requester profile. The workers were paid for their participation – simulating a “real world” crowdsource arrangement where crowdsourced employees are paid for the work they do. To further ensure that the experiment was as realistic as possible, and that the customer request refunds were those a crowdsourced participant would expect to see, we developed the job following a four-step process:

1. Developed scenarios based on interview with a customer-service supervisor for a wireless service provider
2. Created a pre-test survey to test the scenarios for clarity
3. Modified the experiment and scenarios based on feedback from the pre-test
4. Launched the scenario as a crowdsourced Human Intelligence Task (HIT)

Pre-test design and participants

To hire and train crowdsourced workforces, a company would need to provide online job descriptions, and process training. With this in mind, we created a pre-test study to ensure the scenarios used in the experiment were objectively realistic and were structured around actual

rather than hypothetical situations. The purpose of the pre-test was to ask participants to evaluate whether the scenario descriptions and process training directions were easy to follow, and whether the customer refund scenarios were clear or ambiguous.

Pre-test sample size and procedure

One hundred and twenty undergraduate students at a large southeastern university were recruited to participate in a survey in exchange for course credit. Those choosing to participate were then directed to an online survey - www.qualtrics.com (Appendix 1). After accepting the terms of the consent form, the participants were asked to assume the role of a customer service representative for a hypothetical company and respond to the type of information they might be given for a crowdsourced job. The training instructions included different limits on decision authority; that is, whether they had a great deal of personal freedom to make the decision or whether they are more restricted as to what decisions they could make, and different levels of access to customer-relationship information; that is whether they had access to customer-related information including customer-related history or not. At the end of the survey, subjects were then redirected to a link, sponsored by the pool administrator, to acknowledge course credit.

Customer Request Form

The first set of screen shots (four graphics of a customer request form) were displayed to the participants along with a description of the fields in the screen in Figure 8. In succession, the participants viewed each of four parts of the screen, and were asked to assess how easy or difficult it was to understand the description of the refund requests.

Is the description provided above (Very Easy to Understand/Not Easy to understand?)

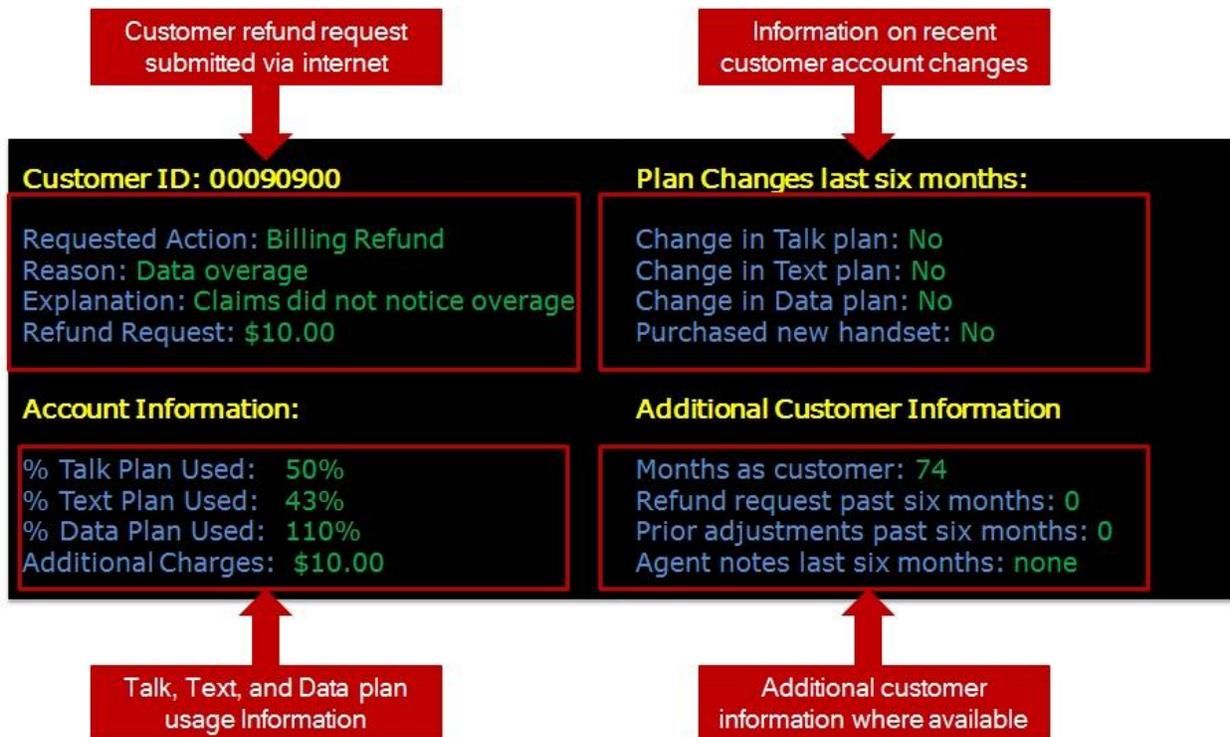


Figure 8 Customer refund request screen

Upon completion of this evaluation, the participants were tested on whether they could correctly interpret the information in the entire customer request screen. The participants were given the overall request screen with all four panels (Figure 8), and asked to use the information on the screen to respond to questions regarding what was being requested, that is: how much of a refund the person was requesting; which of the plans they had exceeded; whether or not they had purchased a new handset within the last six months; how many months they had been a customer. Their results were graded, and the correct answers were displayed on the screen.

Scenario pages

After completing the assessment, and viewing the correct answers, the participants moved on to the next portion of the survey where they were presented with 15 scenarios. For each scenario,

the participants were asked to respond on a scale, the extent to which they thought the scenarios were clear:

“How clear is the situation to you – that is, what they are asking and what information to use to evaluate it...?”

Decision making pages

Finally, the last module of the pre-test – the decision-making pages - was presented. The purpose of the decision-making module was two-fold: to assess the clarity of decision making authority criteria and to test whether the decision selected by the participant varied for each of the three decision-making authority levels.

The participants were presented with one of three decision-making levels (high, medium, and low) which they would use to make decisions. After reviewing the decision making criteria, the participants were asked about the clarity of the decision making criteria:

How clear are you about what you are authorized to do...?

In addition to answering the questions on clarity of the decision making criteria, the participants were each presented with three scenarios (per decision authority level) as a test of their understanding of the decision making criteria. For each of the nine scenarios (three per decision making authority level), the participants were asked what decision they would make, and how easy/difficult it was to make the decision:

What Decision would you make?

How easy/difficult was this decision to make...?

Results of pre-test

When asked to rate the degree of difficulty of understanding the description of the screen (1-very easy/7-very difficult), the participants indicated that each of the screens were easy to understand: “customer id” section – mean 2.3/std. dev. 1.5; “account usage” mean 2.3/std. dev. 1.6; “plan change” section mean 1.5/std. dev. 0.9; “additional information” section mean 1.8/std. dev. 1.2.

The participants then viewed 15 refund request scenarios. When asked to evaluate the clarity of the scenario (1-very clear/7-very unclear), the mean for all scenarios was between 1.9 and 2.6 (SD 1.2- 1.8), indicating that participants felt that all scenarios were clear.

Upon completion of the scenarios, the participants received training on each of the three decision making authority criteria. To assess the clarity of decision making authority instructions, the participants were asked to rate whether or not they were clear on what they were authorized to do (1-very clear/7-very difficult). All the means fell between 2.0 and 2.6 (SD 1.3- 1.7), again indicating that the participants perceived the decision making instructions to be clear.

In conjunction with evaluating the decision-making instructions, the participants were presented with three scenarios for each of the three decision authority levels, and for each, they were to evaluate the ease of decision making (1-very easy/7-very difficult). The results indicated that the participants felt that making decisions given the different decision making criteria was easy (means between 1.5 and 2.6, SD 0.9 - 1.8).

Finally, the participants were asked whether or not they would be willing to sign up for such a job, or refer it to a friend on a 7-point scale. Participant means were 3.7 for both (SD 1.8 and 1.7 respectively) indicating that the students would not be willing to sign up for this type of tasks.

In addition to the instructions, scenario, and decision criteria evaluation, participants were allowed to provide qualitative feedback regarding the experience. Overall, the qualitative results indicated that the refund screens were clearly labeled; everything was neatly organized into the 4 different categories; the plans were easy and straight forward. We made some minor changes to verbiage, and corrected scoring inaccuracies in the training module before launching the experiment.

Field Experiment simulation

Based on the results of our pre-test, we developed a virtual (web-based) contact center in which participants were required to review ten customer service refund requests, and decide whether or not to issue a refund. Workers sourced from MTurk were assigned to one of six different groups, and were asked to make a decision on how to process the refund based on the criteria specific to the group to which they had been assigned. Attention filters were built into the experiment to ensure that workers were not just passively clicking to get through the scenarios (Oppenheimer, Meyvis, & Davidenko, 2009). For constructs in the conceptual model, survey questions were adapted from existing scales. According to Straub (1989), using established scales increases the reliability of the survey instrument and avoids the significant time and effort that would be invested in instrument development; and utilizing existing and validated scales enables future comparison with other research.

Experimental Design and participants

After creating a requestor account, we created a solicitation for workers, called a HIT in MTurk. The HIT detailed the scope of the project – a 25-minute task to test whether it was practical to use crowdsourced employees as customer service representatives for certain tasks. As part of the HIT requirement, we requested that the crowdsourced employees have a HIT approval

rate of 95%, and that they be located in the United States. We did this because we wanted to restrict the experiment to US based crowdsourced workers, and because we wanted an objective quality measure of the workers (95% rating based on history of previous crowdsourced work). The HIT specified that each worker would be paid \$3.50 for successful completion of the task. Upon accepting the HIT, the workers received a link to www.qualtrics.com (Appendix 2) where they were randomly assigned to one of six conditions in a 3 (high decision making authority, medium decision making authority, or low decision making authority) X 2 (access to or no access to additional customer relation information) factorial design.

Procedure

In the process flow described in Figure 9, workers who accepted the HIT were told that the purpose of the study was to evaluate how people in a workforce like Amazon Mechanical Turk (MTurk) would handle customer service billing disputes. They were told they would be asked to assume the role of a customer service representative of a fictional company, and that they would be given a number of customer billing dispute situations to review and resolve. The scenarios were typical of those experienced by a cell service provider. Workers were also advised that upon completion of all scenarios, they would be asked to complete a short questionnaire about their experiences. The workers were told that the entire study would take approximately 25 minutes, and that, based on their performance, they would be paid up to \$3.50 for the 25 minutes required to complete the task. They were also notified that performance would be evaluated by a manager. The intent was to simulate a real world scenario where decisions are sometimes evaluated by supervisors or managers, and to ensure workers thought through each of the decisions for quality before making them.

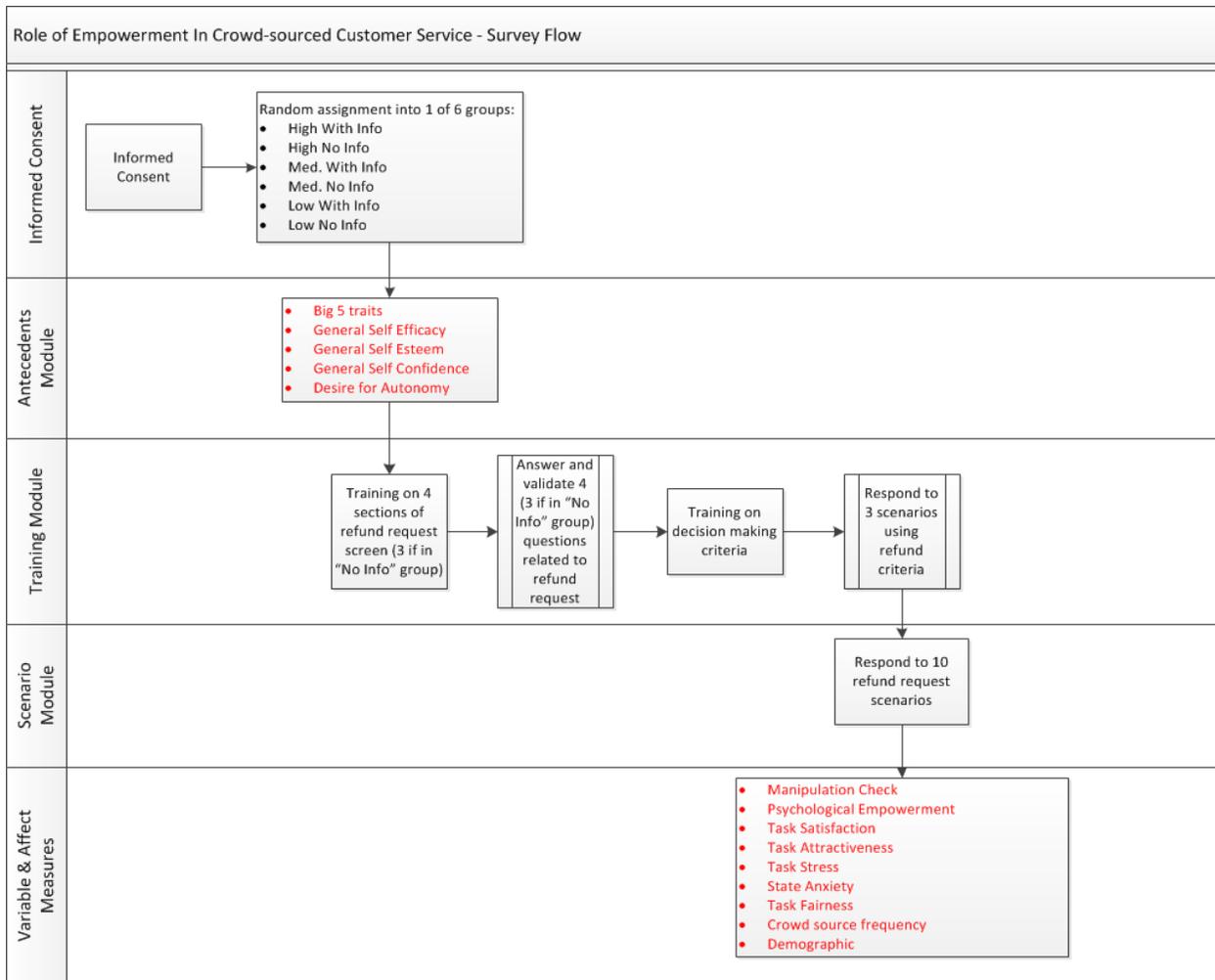


Figure 9 Experiment process flow

The crowdsourced employees agreed to the ex-ante contract by accepting the informed consent form. Upon acceptance of the consent form, the workers were randomly assigned to one of six groups - three “decision authority” levels, each with two “access to customer-relationship information” levels – a 3 (high, medium and low decision authority) x 2 (access to customer-relationship information or not) factorial design (Figure 10)

		Access to Information	
		Yes	No
Decision Authority	High	GROUP 1 (n = 40)	GROUP 2 (n = 40)
	Medium	GROUP 3 (n = 40)	GROUP 4 (n = 40)
	Low	GROUP 5 (n = 40)	GROUP 6 (n = 40)

Figure 10 Factorial design

Manipulation of Independent Variables

Three decision authority conditions were created. For the high decision making authority, the workers were required to review the request and the facts, and decide whether they would “Deny Refund” if request was not justified; “Approve Refund” and indicate how much (they could refund all or some amount requested); or “Refer” to supervisor or manager at their discretion. The primary decision making difference between this group and the other groups was that there was no limit on the refund per case. It was at their discretion.

For the medium decision making authority, the workers were required to review the requests and the facts, and decide whether they would “Deny Refund” if request was not justified; “Approve Refund” and indicate how much (they could refund all or some amount requested); “Refer” to supervisor or manager at their discretion. The primary decision making difference between this group and the other groups was that this group had a \$15 limit refund per case.

For the low decision making authority the workers were required to review the requests and “Approve Refund” if customer has no recent refund history and request was for \$15 or less (regardless of reason); and “Refer” if customer has recent history of other refunds OR request was more than \$15. They were to refer to supervisor any overages for only Talk or Text (no Data), and refer to manager any overages for Data (alone or in addition to Talk or Text) or for defective phone. They were also not authorized to “Deny Refund”.

In addition to decision making authority, two access to customer-relationship information conditions were used. Workers who were assigned to the access to customer-relationship information group saw information about the customer’s relationship with the company for the past six months in the bottom right quadrant of the refund request. This information included how many months they had been a customer, how many refunds they had requested in the last six months, how many adjustments they had received in the past six months, and any notes the agent had made in the last six months. Those without access to customer-relationship account information did not have any information available in the bottom right quadrant of the refund request.

CHAPTER 5

QUANTITATIVE DATA ANALYSIS AND RESULTS

Sample Size, Manipulation Checks, Measures, Reliabilities and Validities

Sample Size Evaluation

We received 271 responses to our project. However, 19 participants were discarded due to partial responses and failure to pass the attention filter check, meaning that they were not reading instructions carefully, leaving us with $N=252$. This number provided us with adequate power to test the hypotheses. The sample was 51.2% male with an average age of 32. Sixty-seven percent had at least some college, and 56% spent more than 20 hours on paid crowdsource work. After eliminating some of the respondents, cell size ranged from 40-44.

Manipulation Checks

Decision Authority was defined as the latitude given to crowdsourced participants in their ability to provide resolution to customers without having to forward their (customer) requests to an authority e.g. supervisor or manager. To determine the degree to which the workers felt authority, two item seven-point Likert-type items were developed (e.g. “I had the decision authority to accomplish my job in an effective manner” ($r = .86$)). Analysis of variance was used to test whether the manipulations created the desired conditions. While the results showed that manipulations were in predicted direction, the medium condition was dropped because, while it did create a moderate level of decision authority (mean=5.8), it was not significantly different from either the high (mean=6.1) or low (mean=5.6). Furthermore, only the high and low conditions were significant ($t=-.58$; $p<.05$).

Access to customer-relationship information was defined as the amount of customer information that crowdsourced participants were allowed to view. This customer-related information included how many months they had been a customer, any refund requests in the past six months, any prior adjustments made to their account in the past six months, and any agent notes from previous encounters with customers. Access to customer-relationship information was manipulated at two levels – available, and not available. To determine if workers perceived differences in the amount of information available to make decisions, two seven-point Likert-type items were developed (e.g. “I had enough customer information available to help me make a good decision” ($r = .94$)). Analysis of variance indicated that workers with no access to customer-relationship information felt they had less access to information than those with access to customer-relationship information ($5.4 < 5.8$). However, the difference was not significant, and the means indicated a ceiling effect where all workers felt they had a great deal of customer-relationship information (5.4 and 5.8 on a 7 point scale). Given this, the manipulation check was used to create two groups by splitting respondents into those above and below the median of 6.

New Independent Variables

After dropping the results that showed no significant manipulation, we created a new model consisting of two independent dummy variables. Dummy variables are useful because they enable you to use a single regression equation to represent multiple groups (Trochim & Donnelly, 2008). The Decision Authority dummy variable was created using the decision authority manipulation variable and was coded “0” for low decision authority ($N=50$) and “1” for high decision authority ($N=70$). An “access to additional customer information” dummy variable

was also created for analysis and was coded “0” for no access to customer information (N=68), and “1” for access to customer information (N=52).

Mediating Variable

Psychological empowerment was measured using an adapted version of Spreitzer’s 1995 12-item scale. Our scale had 11 items (we dropped one item – “my job activities are personally meaningful to me” because our experiment did not afford the workers the opportunity to perform several job activities) representing the four subscales (meaning, impact, self-determination, competence) that measure psychological empowerment and used a seven-point Likert-type scale. All reflective indicators passed factor analysis with greater α than .7 (with the exception of one impact measure), and reliability of 0.9 for all reflective measures, and the following means (standard deviations): Meaning=5.2 (1.2); Impact= 5.4 (1.3); Self-Determination=5.1 (1.6); Competence= 5.9 (1). A single weighted empowerment variable was created by computing a new variable comprising the sum of the average of the four reflective indicators.

Dependent Measures

Task satisfaction was defined as the level of positive feeling that the crowdsourced participants felt about the tasks they performed, and was operationalized by using a two-item seven point Likert-type items adapted from Cammann, Fichman, Jenkins, & Klesh (1983) that asked workers to answer questions on how satisfied they were with the task (e.g. “In general, I liked this job” ($r = .9$, mean = 5.9, $s = 1.1$)). A new variable was computed by averaging the items.

Task attractiveness was defined as the likelihood that crowdsourced participants would be willing to sign-up or recommend these tasks to others if they were offered on a regular basis,

and was operationalized by using a new two-item seven point Likert-type scale e.g. “If offered this job on a regular basis, I would be willing to sign up” ($r = .89$, mean = 5.9, $s = 1.3$)

Task stress was defined in this study as the response of the worker to the work stress experienced in the performance of the tasks. It was operationalized by using a new two-item seven-point Likert-type scale (e.g. “I thought that this job was hard work” ($r = .91$, mean = 2.6, $s = 1.4$)).

Affect Measures

Two affect measures were used in this project. State anxiety was defined as the temporary, uncomfortable experience that occurs when the workers feel threatened by the tasks, and was operationalized using a six-item adapted version of Spielberger State-Trait Anxiety Inventory (e.g. “I feel upset” ($r = .92$, mean = 2.2, $s = 1.2$)). Three items adapted from Ferguson, Ellen, & William O. Bearden (in press) were used to measure whether the workers found their decisions reasonable, fair, and just. e.g. “would you consider the decisions reasonable” (reliability $\alpha = .91$)

Control Variables

Eight control variables are used in this study. The purpose of the control variables was to explain any variance in the dependent variables with and without the influence of the independent variable(s) in order to determine whether some portion of the variance in the dependent variable was attributable to variables exogenous to constructs in the conceptual model (i.e. non-empowerment constructs).

General self-confidence was defined in this study as the extent to which a worker believed himself to be capable, significant, successful, and worthy, and was measured using a new two-item scale e.g. “frequently agonizes over decisions I make” ($r = .87$, mean = 4.2, $s = 1.6$).

General self-esteem was defined as a general set of expectations that a worker possesses, based on past experience, that affect his or her expectations of success in new situations, and was measured by a two-item scale developed by Mowen (2000) (e.g. “I feel very positive about myself” ($r = .94$, mean = 5.3, $s = 1.4$)). General self-efficacy was defined in this study as the global confidence a worker has to successfully perform tasks, and was measured using a three-item scale developed by Chen (2001) (e.g. “I can succeed at most any endeavor to which I set my mind” ($r = .90$, mean = 5.5, $s = 1.1$)). A confirmatory factor analysis was performed using Principal Component Analysis (PCA) on the measurement items comprising the general traits. Varimax rotation was used for the analysis and set to force three factors. The results showed clean factor loadings on all three factors or components. All General Self-Efficacy, General Self-Esteem, and General Self-Confidence indicators loaded above .7.

Task-Self efficacy was defined in this study as the conviction that workers can successfully execute the behavior required to produce the required outcome, and was measured using a new two-item scale (e.g. I can perform the job successfully ($r = .92$, mean = 6.4, $s = .7$)).

Desire for autonomy was defined in this study as the desire to have the ability to make choices according to one’s own free will, and was measured using a three-item scale adapted from Kazis, Ash & Moskowitz (1989) (e.g. I believe I should feel free to make everyday job decisions ($r = .63$, mean = 4.7, $s = 1$)).

Big-five personality traits comprising openness, conscientiousness, agreeableness, stability, and extraversion were measured using a two-item Likert-type item per trait developed by Rammstein & John (2007). For each pair, the difference was calculated, yielding a scores that range from -4 (very low on the trait) to +4 (very high on the trait), with 0 being average. The

means were as follows: Openness = 2.3; Conscientiousness = 3.1; Agreeableness = 1.8; Stability = 1.2; Extraversion = 0.1.

The results of the measures are summarized in Table 1.

Construct	Definition	Items	N	Mean	StDev	Rel.	Cronbach/ Correlation	Source
Decision Authority	Latitude given to crowdsourced participants on their ability to provide resolution to customers without having to forward their (customer) requests to an authority e.g. supervisor or manager.	2	167	5.9	1.1	0.86		New measure developed for this study
Access to customer-relationship information	Amount of customer information that crowdsourced participants will be allowed to view	2	167	5.6	1.1	0.94		New measure developed for this study
Meaning	How a crowdsourced worker places value to their work. Involves a fit between the needs of their work role and their beliefs, values and behaviors	2	167	5.6	1.2	0.95	>.7	Spreitzer, 1995
Impact	How a crowdsourced worker can influence strategic, administrative, or operating outcomes at work	3	167	5.4	1.3	0.87	<.7	Spreitzer, 1995
Competence	How a crowdsourced worker feels they have a sense of choice in initiating and regulating their actions	3	167	5.9	1	0.92	>.7	Spreitzer, 1995
Self-Determination	Crowdsourced workers' belief in their capability to perform work activities with skill	3	167	5.1	1.6	0.93	>.7	Spreitzer, 1995
Task Satisfaction	The level of positive feeling that the crowdsourced participants felt about the tasks they performed.	2	167	5.9	1.1	0.9		Cammann, Fichman, Jenkins, & Klesh, 1983
Task Attractiveness	The likelihood that crowdsourced worker would be willing to sign-up or recommend these tasks to others if they were offered on a regular basis	2	167	5.9	1.3	0.89		New measure developed for this study
Task Stress	The response of the worker to the work stress experienced in the performance of the tasks	2	167	2.6	1.4	0.91		New measure developed for this study
State Anxiety	The temporary, uncomfortable experience that occurs when the workers feel threatened by the tasks	6	167	2.2	1.2	0.92		(Marteau & Bekker, 1992)

Construct	Definition	Items	N	Mean	StDev	Rel.	Cronbach/ Correlation	Source
General Self-Efficacy	Global confidence a worker has to successfully perform tasks	3	167	5.5	1.1	0.9	>.7	(Chen, Gully, & Eden, 2001)
General Self-Esteem	General set of expectations that a worker possesses, based on past experience, that affect his or her expectations of success in new situations	2	167	5.3	1.4	0.94	>.7	(Mowen, 2000)
General Self-Confidence	Extent to which worker believes himself to be capable, significant, successful, and worthy	2	167	4.2	1.6	0.87	>.7	New measure developed for this study
Desire for Autonomy	Desire to have the ability to make choices according to one's own free will	3	167	4.7	1	0.63		Kazis, Ash & Moskowitz, 1989
Task Self-Efficacy	The conviction that workers can successfully execute the behavior required to produce the required outcome	2	167	6.4	0.7	0.91		New measure developed for this study
Openness	the degree of intellectual curiosity, creativity and a preference for novelty and variety	2	167	2.3	2.5	0.41		Rammstein & John, 2007
Conscientious	A tendency to show self-discipline, act dutifully, and aim for achievement	2	167	3.1	2.1	0.62		Rammstein & John, 2007
Agreeableness	A tendency to be compassionate and cooperative rather than suspicious and antagonistic towards others	2	167	1.8	2.4	0.4		Rammstein & John, 2007
Stability	The degree of emotional stability and impulse control	2	167	1.2	3.2	0.81		Rammstein & John, 2007
Extraversion	The tendency to seek stimulation in the company of others, and talkativeness	2	167	0.1	2.8	0.73		Rammstein & John, 2007

Table 1: Measures summary

Results

Hypothesis Testing

A 2 X 2 (decision authority X access to customer-relationship information) ANOVA was used to test Hypotheses 1 and 2 which predicted main effects of decision authority access to customer-relationship information on psychological empowerment. Both were significant (Figure 12). As hypothesized, the more decision-making authority a person had the greater their psychological empowerment ($F 5.8, p < .01$), and the more access to customer-relationship information a person had the greater their psychological empowerment ($F 75.3, p < .01$). There was no significant interaction.

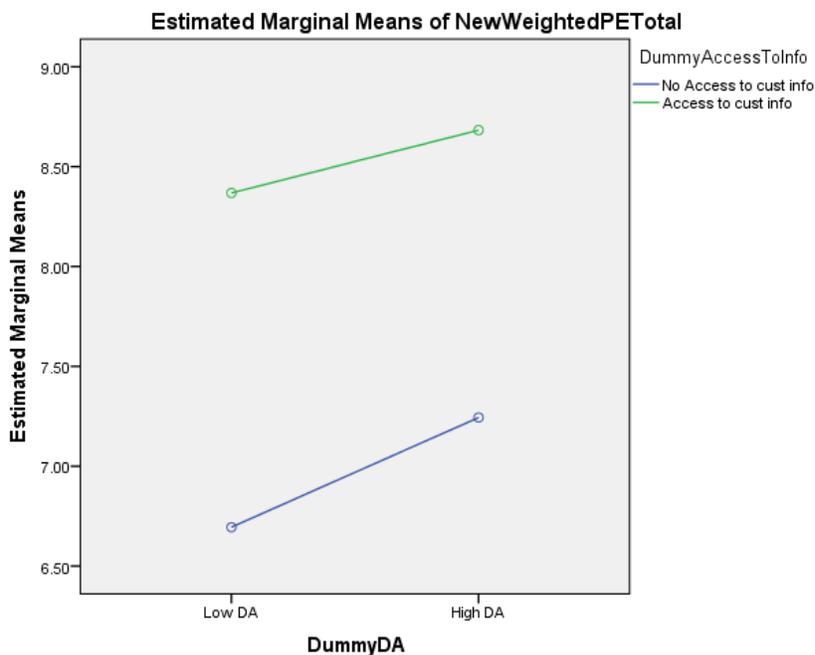


Figure 11 Effect of Decision Authority and Access to customer-relationship information on psychological empowerment

To test whether psychological empowerment mediated the decision authority effects on task satisfaction, we followed the four step process outlined by Miles and Shevlin (2001).

Regressing decision authority on task satisfaction, we find a significant effect of the predictor

on the outcome variable ($b=.41, p<.05$). Then, we examined the relationship between decision authority and the mediator, psychological empowerment, finding also a significant effect ($b=2.6, p<.05$). Controlling for decision authority, we found that psychological empowerment was a significant predictor of task satisfaction ($b=.2, p<.05$) and it was a complete mediator of those effects, as the relationship between decision authority and task satisfaction was no longer significant when psychological empowerment was included ($b=-.1, p>.05$).

We followed the same steps to test whether psychological empowerment mediated access to customer-relationship information effects on task satisfaction. Regressing access to customer-related information on task satisfaction, we find a significant effect of the predictor on the outcome variable ($b=1.06, p<.05$). Then, we examined the relationship between access to customer-relationship information and the mediator, psychological empowerment, finding also a significant effect ($b=3.1, p<.05$). Controlling for access to customer-relationship information, we found that psychological empowerment was a significant predictor of task satisfaction ($b=.2, p<.05$) and it was a partial mediator of those effects, as the relationship between access to customer-relationship information and task satisfaction was still significant when psychological empowerment was included ($b=-.5, p<.05$).

As demonstrated in the mediation analysis above, Hypothesis 4 was supported ($b=.2, p<.05$) However, the predicted negative effects of psychological empowerment on task stress (Hypothesis 5) was not significant ($b=.04, p>.05$). Finally, hypothesis 6 which predicted that task satisfaction would be positively related to task attractiveness was supported, ($b=.9, p<.05$).

Hierarchical Regression

Hierarchical regression was used to test the effect of the trait/control variables on the mediator variable (psychological empowerment). Hierarchical multiple regressions allowed us to specify a fixed order of entry for variables in order to control for the effects of covariates. In this study, to test their effects on psychological empowerment, we ran stepwise regression to identify which, if any, predicted psychological empowerment and therefore task satisfaction. Table 2 shows the results of the hierarchical regression and the adjusted R^2 for relative effects. We used linear regression and entered the control variables first ($r^2 = .18$, $p < .05$) before entering the predictor variables, decision authority ($r^2 = .32$, $p < .05$) and access to customer-related information ($r^2 = .44$, $p < .05$).

Results of Hierarchical Regression Analysis for Psychological Empowerment

Variables	Model 1	Model 2	Model 3
Step 1: Control			
Task Self-Efficacy	0.44	0.64	-0.02
General Self-Esteem	0.69	0.84 *	0.75 *
Desire For Autonomy	-0.52	-0.58	-0.54
General Self-Confidence	-0.06	-0.08	-0.02
General Self-Efficacy	0.75	0.64	0.45
Step 2: Independent			
Decision Authority		3.27 ***	3.74 ***
Step 3: Independent			
Access to customer-relationship information			3.16 ***
R ²	0.18	0.32	0.44
Adjusted R ²	0.14	0.29	0.40
F	4.89 ***	9.00 ***	12.37 ***
ΔR^2	0.18 ***	0.15 ***	0.11 ***
*p < .05			
**p < .01			
***p < .001			

Table 2 Hierarchical regression

CHAPTER 6

DISCUSSION AND IMPLICATIONS

This study used a crowdsourced workforce to test whether changes in structural empowerment, in the form of levels of decision authority and degree of access to customer-relationship information, led to greater psychological empowerment and subsequently positive work outcomes. To answer this question, we created a virtual contact center where structural empowerment dimensions of decision authority and access to customer-relationship information were manipulated. We studied the causal relationship between the empowerment structures put in place for crowdsourced employees and their psychological response to those structures. We then studied the effect of the psychological responses on work commitment outcomes of task satisfaction, task stress, and task attractiveness.

Support for hypothesis 1 indicated that crowdsourced workers who had higher decision making authority felt more psychologically empowered than those with low decision making authority. The results confirm that crowdsourced employees are as affected by decision making latitude as their counterparts in traditional work settings. Hypothesis 2 confirmed that workers who had access to customer-relationship information felt more empowered than those who did not. This was likely because the customer-relationship information helped re-enforce the decisions they made regarding customer refunds. Both findings confirm employee empowerment literature, and specifically Laschinger's nursing study, supporting a causal relationship between structural empowerment and psychological empowerment.

The mediation effect of psychological empowerment on decision authority was significant. Prior research has shown that psychological empowerment plays a significant role in mediating the relationship between structural empowerment and work outcomes. This study

supported prior literature and implies that even in the context of crowdsourcing, psychological empowerment mediates the relationship between decision authority and task satisfaction. In addition, psychological empowerment mediated the relationship between access to customer-relationship information and task satisfaction implying again that – in the context of crowdsourcing - workers experience task satisfaction if access to customer-relationship information makes them feel psychologically empowered.

Previous empowerment literature had shown that employees who experience psychological empowerment are more satisfied with their jobs and we found that psychological empowerment affected task satisfaction, which subsequently affect task attractiveness – even in a crowdsourced context. Contrary to predictions, greater psychological empowerment did not lead to less task stress.

The prior conceptual and descriptive research focused on structural empowerment, or workplace mechanisms for generating empowerment, and psychological empowerment, the felt empowerment. Responding to calls for intervention studies, this research experimentally tests the effects of structural empowerment changes, through different degrees of decision-making authority and access to customer-relationship information, on psychological empowerment and subsequent work-related outcomes in a crowdsource context. The scarcity of academic literature in crowdsourcing positioned this study to be a contributor to the both domains. Although empowerment has been used in both practitioner and academic literature to explore relationships in traditional work environments (i.e. non crowdsourced work environments), we did not find any empowerment literature (academic or practitioner) that used the theories of empowerment as a lens to explore crowdsourced customer service. Unlike traditional work relationships, crowdsourced workers may be comfortable with restrictive work structures where all their

decisions are reviewed by supervisors or managers, and where they lack decision latitude. By conducting this research, we wanted to find out if a crowdsourced environment was different in some way from the traditional work environment relative to empowerment. The results of this study support the idea that characteristics of the work environment affect workers' feelings of psychological empowerment. If crowdsourced workers are given greater decision making latitude and more access to customer-relationship information there will be a noticeable effects on workers' feelings of psychological empowerment, task satisfaction, and task attractiveness. A key finding of this study was that task satisfaction was a significant predictor of task attractiveness. This finding implies that paid crowdsourced participants in a customer service context will be attracted to, and will self-select tasks that they find satisfying.

Contributions to Research and Practice

In this dissertation, an integrated model was adopted to explore the decision making process of crowdsourced customer service representatives using an integrated empowerment framework. As a result, this research went beyond previous crowdsourcing and empowerment research in three ways.

Firstly, although we adapted an integrated model of structural and psychological empowerment (Laschinger, 2001), our model – and in the context of crowdsourcing – only used two structural empowerment dimensions: decision making authority and access to customer-relationship information, thus reducing Kanter's 1993 four-dimension structural empowerment model. By testing the effects of these structural empowerment dimensions on psychological empowerment, we added to the growing body of empowerment research (Laschinger 2001; Siebert 2004; Spreitzer 1995; Vacharakiat 2008). Secondly, this research was distinct from previous empowerment research in that we conducted a field experiment as the primary method

versus using surveys. Further, we empirically tested the manipulation effects of structural empowerment and the confounding effects of worker traits as controls in our experiment. Lastly, we mimicked previous literature by modeling psychological empowerment as a reflective construct. Empowerment literature suggests that psychological empowerment is manifest in all four dimensions – if any one dimension is missing, then the experience of empowerment will be limited (Spreitzer, 2007), not eliminated.

This dissertation contributed to practice by providing new insights into nurturing of crowdsourcing arrangements with focus on empowerment. The current research establishes that different levels of decision making authority and access to customer-relationship information do affect task satisfaction and task attractiveness amongst crowdsourced workers. When greater decision making latitude is given, the crowdsourced workers are more satisfied with their jobs versus when lower decision making latitude is given. This finding has implications on practice, and in how organizations can design their crowdsource tasks. If crowdsource requestors decide to crowdsource customer service, they can use this study as a basis for determining how much decision latitude to give their crowdsource workers in order to make the tasks attractive for self-selection. In contrast, this study showed that crowdsource workers were not aware of the additional customer-relationship information they had. The implication of this finding is that crowdsourced workers “do not know what they do not know”. This finding informs crowdsource requestors that they can protect their customer proprietary information by not providing it to workers, and still get work commitment outcomes of task satisfaction and task attractiveness.

Results from this study can thus be used by practitioners to make decisions about the future of their cost cutting and outsourcing initiatives and is also relevant to crowdsource environment from perspective of employers trying to empower workers who are ex ante contract

workers. This study revealed that crowdsourcing can be a scalable way of engaging low cost man-power to customer-relationship service tasks, and that empowerment can be added as a way to assure task satisfaction and ensure task attractiveness.

Limitations

Although we were able to see the effects of the manipulations, they weren't distinct enough to create three levels of decision authority and for crowdsourced workers to see distinct differences in the amount of customer relationship information – the latter leading to ceiling effect. Future research should focus on empirically testing the effects of the various mechanisms for increasing structural empowerment, preferably in field studies and with other populations to increase generalizability. One way to mitigate the manipulation issue in future research is to display to the “no access to customer-relationship information group”, a refund screen that shows the value of customer-relationship information. They would then have a basis by which to judge whether the scenarios they responded to had enough customer-relationship information. A second way is to increase the measurement scale from “7” to “9”. This would provide a larger range of answers to the manipulation check of access to customer-relationship information.

Lastly, this experiment was only conducted on a specific type of crowdsourced worker – one that participates in paid crowdsourcing where the incentive to complete the tasks is monetary in nature. Crowdsourcing is a relatively new academic domain with different types of crowdsourcing e.g. crowdfunding, creative crowdsourcing, etc. Future studies could be conducted on these other types of crowdsourcing for example, the motivational nature of creative and crowdfunding crowdsourcing.

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Appendix 1

Pre-Test

Below is the pre-test administered to the student pool.

Georgia State University

Department of Marketing

Informed Consent

Title: Evaluating the clarity of customer requests and training procedures for an online workforce

Principal Investigator: Stephen Ichatha

I. Purpose:

You are invited to participate in a research study related to crowdsourcing customer service – that is, can companies effectively use people in online workforces to help them address some customer service issues? The purpose of the study is to evaluate whether a non-employee would find training and situation descriptions clear, and resolution directions easy to follow. You are invited to participate because you are enrolled in MK3010. A total of 120 participants will be recruited for this study.

II. Procedures:

If you decide to participate, you will complete a brief survey. This survey will ask you to review the customer request screen for clarity and evaluate the training procedures. You will then see a number of scenarios and you will be asked how you would respond to the request if you were acting as a customer service representative. The entire survey will take less than 30 minutes. You will receive 1.5 points credit for your participation. At the end of the survey you will be re-directed to another site where you will receive evidence of your participation. There are no further requirements.

III. Risks:

In this study, you will not have any more risks than you would in a normal day of life.

IV. Benefits:

Participation in this study may not benefit you personally. However, it will help the researchers understand how people react to the types of information that might be available in crowdsourced customer service situations. The information you provide may help managers design work environments that allow them to use a different type of workforce for some jobs and to give those workers the information and authority to make good decisions.

V. Voluntary Participation and Withdrawal:

Participation in research is voluntary. You do not have to be in this study. If you decide to be in the study and change your mind, you have the right to drop out at any time. You may skip questions or stop participating at any time. Whatever you decide, you will not lose any benefits to which you are otherwise entitled. Alternative course credit options are detailed in your course syllabus.

VI. Confidentiality:

We will keep your records private to the extent allowed by law. The principal investigator and his adviser will have access to the information you provide. Information may also be shared with those who make sure the study is done correctly (GSU Institutional Review Board and/or the Office for Human Research Protection (OHRP)). We will **not** collect any identifiable information from you (e.g., your name, social security number, home address, or the like). As this study will be completed online, your IP address is recorded, but this data will be destroyed when data collection is completed. Moreover, the results of this study will be summarized and reported in group form. You will not be identified personally.

VII. Contact Persons:

Contact Stephen Ichatha at (678) 457-0848 or sichatha@student.gsu.edu if you have questions about this study. If you have questions or concerns about your rights as a participant in this research study, you may contact Susan Vogtner in the Office of Research Integrity at 404-413-3513 or svogtner1@gsu.edu.

VIII. Copy of Consent Form to Subject:

You may print or save this screen for your records.

If you are willing to volunteer for this research, please click “I agree” below.

I have read, understood, and, if desired, printed a copy of the above consent form and desire of my own free will to participate in this study.

- Yes
- No

This is a study about how a company might handle some customer service requests by recruiting temporary employees in online workplaces (crowdsourcing). Such online work forces mean workers can work wherever and whenever they want to if they have a computer connected to the Internet.

Here's how it might work at a cell phone company that wants to crowdsource some customer service requests for refund..

- The company receives a refund request via the internet
- A refund request file is then created
- Information from the customer's history with the company is added to the file
- A customer service representative would then see a screen with all this information

Based on the training and information they are given, the customer service representative would have to decide how to deal with the request. For example, they might:

- approve or disapprove a request
- decide how much money, if any to refund, or
- send a request to a supervisor or manager for further consideration

To be a temporary customer service representative, a person must go through some training on the company's system, and on how to make decisions.

You will now participate in some of the training and then respond to the situations presented.

The next pages will explain how to read each section of the customer service request.

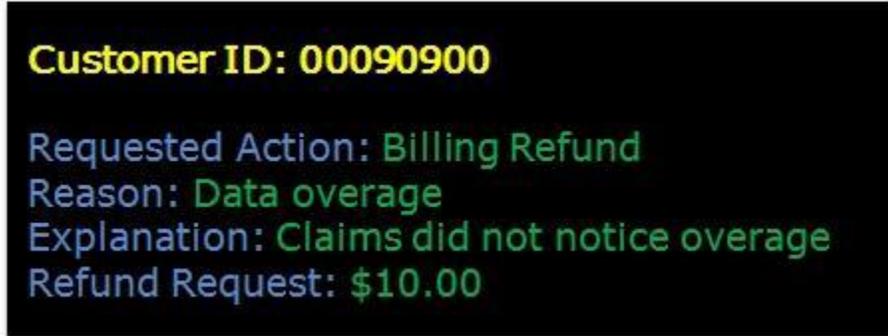
Please read these carefully and answer the questions provided.

We are interested in your honest opinions. There are no right or wrong answers.

In the top left corner of the customer request record is the "Customer ID" Section (see below). It includes:

- Customer identification (ID) number or the unique number assigned to that customer.
- The requested actions. All of the ones you will see are requests for a refund to their bill
- The reason they are requesting the refund, chosen from a set of possible reasons
- Any explanation the customer may offer
- The amount of refund requested

"Customer ID" Section:



	Very Easy to Understand 1	2	3	Neither Easy nor Difficult to Understand 4	5	6	Very Difficult to Understand 7
Is the description provided above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

In the lower left corner of the record is the Account Usage information (see below).

When customers sign up with a cell phone company, they agree to a monthly fee based on how much time they want for talking, texting, or using the internet (called data) on their phone.

This portion of the refund request file tells you:

- What percentage of their total time for talk, text or data plan was used at the end of the billing period
- If they go over their agreed allotment on one or more, they will be charged extra for "overage."
- So, if a person used more than 100% of some part of their plan, the screen shows which portion of their plan went over
- The screen also shows additional charges.

"Account Usage" Section:



	Very Easy to Understand 1	2	3	Neither Easy nor Difficult to Understand 4	5	6	Very Difficult to Understand 7
Is the description provided above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

On the top right corner of the record is the "Plan Change" information (see below), and contains information on any plan (or contract) changes the customer has requested in the last 6 months.

When customers sign up with a cell phone company, they have the option to change their talk, text, or data plan at any time.

The screen also tells the customer service representative whether the customer has purchased a new handset (phone) within the last six months

There will be a "Yes" if the customer has:

- Increased or decreased the time for their talk, text or data plan.
- Purchased a new handset (or phone)

In the industry, increases are often called "upgrades" and decreases are called "downgrades."

"Plan Changes" Section:



	Very Easy to Understand 1	2	3	Neither Easy nor Difficult to Understand 4	5	6	Very Difficult to Understand 7
Is the description provided above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The final portion of the request file is the bottom right of the screen. This "Additional Customer Information" section includes:

- How long in months they have been a customer
- Whether they have requested other refunds in past 6 months
- Whether any billing adjustments were made in the past 6 months, or
- Any notes from such previous customer service contacts

"Additional Information" Section

Additional Customer Information

Months as customer: 74
 Refund request past six months: 0
 Prior adjustments past six months: 0
 Agent notes last six months: None

	Very Easy to Understand 1	2	3	Neither Easy nor Difficult to Understand 4	5	6	Very Difficult to Understand 7
Is the description provided above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Now that you've had an opportunity to review the four sections of the Customer Refund Request, please review the entire refund request below and answer the following questions

Customer ID: 00090900

Requested Action: Billing Refund
 Reason: Data overage
 Explanation: Claims did not notice overage
 Refund Request: \$10.00

Account Usage Information:

% Talk Plan Used: 50%
 % Text Plan Used: 43%
 % Data Plan Used: 110%
 Additional Charges: \$10.00

Plan Changes last six months:

Change in Talk plan: No
 Change in Text plan: No
 Change in Data plan: No
 Purchased new handset: No

Additional Customer Information

Months as customer: 74
 Refund request past six months: 0
 Prior adjustments past six months: 0
 Agent notes last six months: None

How much of a refund is this person requesting?

- \$10
- \$110
- \$43
- Don't know/Not sure

Which of the following plans have the exceeded?

- Talk Plan
- Text Plan
- Data Plan
- Don't know/Not sure

Have they purchased a new handset within last six months?

- Yes
- No
- Don't know/Not sure

How many months have they been a customer?

Congratulations! You have now completed the training portion on how to read the customer refund requests. In the next section, you will see a number of scenarios. The scenarios are based on typical customer service refund requests, and they vary for each scenario. Please read each refund request file carefully. Then answer the questions that follow.

Customer ID: 00090900

Requested Action: **Billing Refund**
Reason: **Data overage**
Explanation: **Claims did not notice overage**
Refund Request: **\$10.00**

Plan Changes last six months:
Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Account Information:
% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **110%**
Additional Charges: **\$10.00**

Additional Customer Information
Months as customer: **74**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months: **None**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 000856798

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Text overage**
Explanation: **None**
Refund Request: **\$15.00**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **Yes**
Purchased new handset: **No**

Account Information:

% Talk Plan Used: **47%**
% Text Plan Used: **113%**
% Data Plan Used: **90%**
Additional Charges: **\$15.00**

Additional Customer Information

Months as customer: **6**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months:
• **Customer moved to higher data plan**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00190978

Plan Changes last six months:

Requested Action: Billing Refund
Reason: Voice overage
Explanation: Claims emergency calls during Hurricane Sandy
Refund Request: \$15.00

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: No

Account Information:

Additional Customer Information

% Talk Plan Used: 150%
% Text Plan Used: 93%
% Data Plan Used: 85%
Additional Charges: \$15.00

Months as customer: 24
Refund request past six months: 2
Prior adjustments past six months: 2
Agent notes last six months:
• Asked customer to move to higher data plan due to overage
• Customer opted not to move to higher plan

	Very Clear 1	2	3	Neither Clear nor unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00054923

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Defective Phone**
Explanation: **Claims defective Phone**
Refund Request: **\$75**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **Yes**

Account Information:

Additional Customer Information

% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **90%**
Additional Charges: **\$0.00**

Months as customer: **24**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months:
• **Customer purchased 2 year full phone replacement warranty**

	Very Clear 1	2	3	Neither Clear nor unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00343101

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Claims wrong amount on bill**
Explanation: **None**
Refund Request: **\$75.00**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Account Information:

% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **80%**
Additional Charges: **\$0.00**

Additional Customer Information

Months as customer: **36**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months: **No**

	Very Clear 1	2	3	Neither Clear nor unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00043200

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Data overage**
Explanation: **Claims family member responsible for overage**
Refund Request: **\$30.00**

Change in Talk plan: **Yes**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Account Information:

% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **200%**
Additional Charges: **\$30.00**

Additional Customer Information

Months as customer: **6**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months:
• **Customer converted to talk share plan**

	Very Clear 1	2	3	Neither Clear nor unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 000856798

Plan Changes last six months:

Requested Action: **Billing Refund**

Reason: **Text overage**

Explanation: **None**

Refund Request: **\$25.00**

Change in Talk plan: **No**

Change in Text plan: **No**

Change in Data plan: **Yes**

Purchased new handset: **No**

Account Information:

% Talk Plan Used: **47%**

% Text Plan Used: **213%**

% Data Plan Used: **90%**

Additional Charges: **\$25.00**

Additional Customer Information

Months as customer: **16**

Refund request past six months: **0**

Prior adjustments past six months: **0**

Agent notes last six months:

- **Customer requested lower data plan**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Please take a few seconds to relax while the application loads the next set of questions. Please click the button at bottom of page when ready to proceed...



Customer ID: 00190978

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Voice overage**
Explanation: **Claims emergency calls during natural disaster**
Refund Request: **\$15.00**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Account Information:

Additional Customer Information

% Talk Plan Used: **150%**
% Text Plan Used: **93%**
% Data Plan Used: **85%**
Additional Charges: **\$15.00**

Months as customer: **24**
Refund request past six months: **1**
Prior adjustments past six months: **1**
Agent notes last six months: **No**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00054923

Plan Changes last six months:

Requested Action: **Billing Refund**

Reason: **Defective Phone**

Explanation: **Claims defective Phone**

Refund Request: **\$50.00**

Change in Talk plan: **No**

Change in Text plan: **No**

Change in Data plan: **No**

Purchased new handset: **No**

Account Information:

% Talk Plan Used: **50%**

% Text Plan Used: **43%**

% Data Plan Used: **90%**

Additional Charges: **\$0.00**

Additional Customer Information

Months as customer: **28**

Refund request past six months: **0**

Prior adjustments past six months: **0**

Agent notes last six months:

- **Customer opted not to purchase 2 year full phone replacement warranty**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00095700

Plan Changes last six months:

Requested Action: **Billing Refund**

Reason: **Data overage**

Explanation: **No**

Refund Request: **\$45.00**

Change in Talk plan: **No**

Change in Text plan: **No**

Change in Data plan: **Yes**

Purchased new handset: **No**

Account Information:

% Talk Plan Used: **50%**

% Text Plan Used: **43%**

% Data Plan Used: **300%**

Additional Charges: **\$45.00**

Additional Customer Information

Months as customer: **16**

Refund request past six months: **3**

Prior adjustments past six months: **2**

Agent notes last six months:

- **Customer opted to move to lower data plan to reduce monthly bill**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00096800

Plan Changes last six months:

Requested Action: **Billing Refund**

Change in Talk plan: **No**

Reason: **Data Overage**

Change in Text plan: **No**

Explanation: **Claims did not exceed data plan**

Change in Data plan: **No**

Refund Request: **\$35.00**

Purchased new handset: **No**

Account Information:

Additional Customer Information

% Talk Plan Used: **75%**

Months as customer: **36**

% Text Plan Used: **23%**

Refund request past six months: **0**

% Data Plan Used: **50%**

Prior adjustments past six months: **0**

Additional Charges: **\$35.00**

Agent notes last six months:

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 00107700

Plan Changes last six months:

Requested Action: **Billing Refund**

Reason: **Text overage**

Explanation: **Claims International texting**

Refund Request: **\$15.00**

Change in Talk plan: **No**

Change in Text plan: **No**

Change in Data plan: **NO**

Purchased new handset: **No**

Account Information:

% Talk Plan Used: **60%**

% Text Plan Used: **113%**

% Data Plan Used: **87%**

Additional Charges: **\$15.00**

Additional Customer Information

Months as customer: **6**

Refund request past six months: **2**

Prior adjustments past six months: **1**

Agent notes last six months:

- **Customer enquired about International texting. Advised customer to add new plan**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 02565700

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Data overage/Defective Phone**
Explanation: **Claims defective phone used up data plan**
Refund Request: **\$1000.00**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **Yes**

Account Information:

% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **2000%**
Additional Charges: **\$1000.00**

Additional Customer Information

Months as customer: **2**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months:

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 04675700

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Talk overage**
Explanation: **Claims unlimited talk plan**
Refund Request: **\$55.00**

Change in Talk plan: **Yes**
Change in Text plan: **Yes**
Change in Data plan: **Yes**
Purchased new handset: **No**

Account Information:

Additional Customer Information

% Talk Plan Used: **150%**
% Text Plan Used: **43%**
% Data Plan Used: **70%**
Additional Charges: **\$55.00**

Months as customer: **20**
Refund request past six months: **1**
Prior adjustments past six months: **1**
Agent notes last six months:
• **Customer upgraded to unlimited talk, text and data plan**

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Customer ID: 04566800

Plan Changes last six months:

Requested Action: **Billing Refund**

Reason: **Text Overage**

Explanation: **Claims did not exceed text plan**

Refund Request: **\$5.00**

Change in Talk plan: **No**

Change in Text plan: **No**

Change in Data plan: **No**

Purchased new handset: **No**

Account Information:

Additional Customer Information

% Talk Plan Used: **75%**

% Text Plan Used: **23%**

% Data Plan Used: **50%**

Additional Charges: **\$5.00**

Months as customer: **26**

Refund request past six months: **0**

Prior adjustments past six months: **0**

Agent notes last six months:

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
Based on the information above, how clear are you about what decision you would make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding whether or not the refund request is clear

Thank You very much for completing the scenarios. We are almost done with the survey!

All companies try to provide superior customer service

As a service oriented company, we value our customers and want to treat them fairly.

- Our goal is to address customer concerns by fairly assessing situations, determining the cause, and using guidelines to help us resolve issues with a focus on customer's satisfaction
- In most cases, customer service representatives like yourselves, represent the company and are faced with the task of determining whether the customer should get a refund
- Sometimes you can fulfill a customer service request, whereas other times you have to or may want to forward the request to a supervisor or manager
- You always have an immediate supervisor to help with your concerns, and a manager reviews all decisions to be sure that decisions are reasonable given the policy and to monitor customer service costs

To prepare you to make decisions, please read the next several pages carefully and answer the questions in regards to what course of action to take.

We will also introduce some decision restrictions that are typical in this kind of business.

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select “Deny Refund”
- If you think the request is justified, select “Approve Refund” and indicate how much money to refund

There is no refund limit per case

The refund amount is at your discretion, however it is unusual to exceed \$150 across ten cases (\$15 per case)

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
From the description above, how clear are you about what you are authorized to do?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding the decision making criteria

Now let us do three customer service requests to determine whether or not you understood the criteria for denying or approving a refund

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select “Deny Refund”
- If you think the request is justified, select “Approve Refund” and indicate how much money to refund

There is no refund limit per case

The refund amount is at your discretion, however it is unusual to exceed \$150 across ten cases (\$15 per case)

Customer ID: 00090900

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Data overage**
Explanation: **Claims did not notice overage**
Refund Request: **\$10.00**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Account Usage Information:

% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **110%**
Additional Charges: **\$10.00**

Additional Customer Information

Months as customer: **74**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months: **None**

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select “Deny Refund”

– If you think the request is justified, select “Approve Refund” and indicate how much money to refund

There is no refund limit per case

The refund amount is at your discretion, however it is unusual to exceed \$150 across ten cases (\$15 per case)

Customer ID: 00054923 Requested Action: Billing Refund Reason: Defective Phone Explanation: Claims defective Phone Refund Request: \$75	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: Yes
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 90% Additional Charges: \$0.00	Additional Customer Information Months as customer: 24 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer purchased 2 year full phone replacement warranty

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select “Deny Refund”
- If you think the request is justified, select “Approve Refund” and indicate how much money to refund

There is no refund limit per case

The refund amount is at your discretion, however it is unusual to exceed \$150 across ten cases (\$15 per case)

Customer ID: 00190978

Requested Action: **Billing Refund**
 Reason: **Voice overage**
 Explanation: **Claims emergency calls during natural disaster**
 Refund Request: **\$15.00**

Plan Changes last six months:

Change in Talk plan: **No**
 Change in Text plan: **No**
 Change in Data plan: **No**
 Purchased new handset: **No**

Account Information:

% Talk Plan Used: **150%**
 % Text Plan Used: **93%**
 % Data Plan Used: **85%**
 Additional Charges: **\$15.00**

Additional Customer Information

Months as customer: **24**
 Refund request past six months: **1**
 Prior adjustments past six months: **1**
 Agent notes last six months: **No**

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Now we will make the refund criteria a little different:

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select "Deny Refund"
- If you think the request is justified, select "Approve Refund"

There is no refund limit per case

However, you cannot exceed \$150 across ten cases (\$15 per case)

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
From the description above, how clear are you about what you are authorized to do?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding the decision making criteria

Now let us do three customer service requests to determine whether or not you understood the criteria for denying or approving a refund

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select "Deny Refund"
- If you think the request is justified, select "Approve Refund"

There is no refund limit per case

However, you cannot exceed \$150 across ten cases (\$15 per case)

Customer ID: 00090900	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: Claims did not notice overage	Change in Data plan: No
Refund Request: \$10.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50%	Months as customer: 74
% Text Plan Used: 43%	Refund request past six months: 0
% Data Plan Used: 110%	Prior adjustments past six months: 0
Additional Charges: \$10.00	Agent notes last six months: None

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select "Deny Refund"
- If you think the request is justified, select "Approve Refund"

There is no refund limit per case

However, you cannot exceed \$150 across ten cases (\$15 per case)

Customer ID: 00054923

Requested Action: **Billing Refund**
 Reason: **Defective Phone**
 Explanation: **Claims defective Phone**
 Refund Request: **\$75**

Plan Changes last six months:
 Change in Talk plan: **No**
 Change in Text plan: **No**
 Change in Data plan: **No**
 Purchased new handset: **Yes**

Account Information:
 % Talk Plan Used: **50%**
 % Text Plan Used: **43%**
 % Data Plan Used: **90%**
 Additional Charges: **\$0.00**

Additional Customer Information
 Months as customer: **24**
 Refund request past six months: **0**
 Prior adjustments past six months: **0**
 Agent notes last six months:
 • **Customer purchased 2 year full phone replacement warranty**

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- If you think the request is not justified, select "Deny Refund"
- If you think the request is justified, select "Approve Refund"

There is no refund limit per case

However, you cannot exceed \$150 across ten cases (\$15 per case)

<p>Customer ID: 00190978</p> <p>Requested Action: Billing Refund Reason: Voice overage Explanation: Claims emergency calls during natural disaster Refund Request: \$15.00</p> <p>Account Information:</p> <p>% Talk Plan Used: 150% % Text Plan Used: 93% % Data Plan Used: 85% Additional Charges: \$15.00</p>	<p>Plan Changes last six months:</p> <p>Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No</p> <p>Additional Customer Information</p> <p>Months as customer: 24 Refund request past six months: 1 Prior adjustments past six months: 1 Agent notes last six months: No</p>
--	---

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

We will now make one more change to the refund criteria:

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- Refer to Supervisor
–If overage is Talk or Text, and request is \$15 or less, and customer has no other overages,
- Refer to Manager
–If overage is Data, and request is \$16 or more
–If request is related to defective phone

	Very Clear 1	2	3	Neither Clear nor Unclear 4	5	6	Very Unclear 7
From the description above, how clear are you about what you are authorized to do?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments regarding the decision making criteria

Now let us do three customer service requests to determine whether or not you understood the criteria for denying or approving a refund

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- Refer to Supervisor
–If overage is Talk or Text, and request is \$15 or less, and customer has no other overages,
- Refer to Manager
–If overage is Data, and request is \$16 or more

-If request is related to defective phone

Customer ID: 00090900 Requested Action: Billing Refund Reason: Data overage Explanation: Claims did not notice overage Refund Request: \$10.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Usage Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 110% Additional Charges: \$10.00	Additional Customer Information Months as customer: 74 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: None

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- Refer to Supervisor
-If overage is Talk or Text, and request is \$15 or less, and customer has no other overages,
- Refer to Manager
-If overage is Data, and request is \$16 or more

-If request is related to defective phone

<p>Customer ID: 00054923</p> <p>Requested Action: Billing Refund Reason: Defective Phone Explanation: Claims defective Phone Refund Request: \$75</p>	<p>Plan Changes last six months:</p> <p>Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: Yes</p>
<p>Account Information:</p> <p>% Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 90% Additional Charges: \$0.00</p>	<p>Additional Customer Information</p> <p>Months as customer: 24 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer purchased 2 year full phone replacement warranty</p>

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When presented with the customer refund request, you are to review the request and make one of the following decisions:

- Refer to Supervisor
 - If overage is Talk or Text, and request is \$15 or less, and customer has no other overages,
- Refer to Manager
 - If overage is Data, and request is \$16 or more
 - If request is related to defective phone

<p>Customer ID: 00190978</p> <p>Requested Action: Billing Refund Reason: Voice overage Explanation: Claims emergency calls during natural disaster Refund Request: \$15.00</p> <p>Account Information:</p> <p>% Talk Plan Used: 150% % Text Plan Used: 93% % Data Plan Used: 85% Additional Charges: \$15.00</p>	<p>Plan Changes last six months:</p> <p>Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No</p> <p>Additional Customer Information</p> <p>Months as customer: 24 Refund request past six months: 1 Prior adjustments past six months: 1 Agent notes last six months: No</p>
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What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

In your opinion

	Very Easy 1	2	3	Neither Easy Nor Difficult 4	5	6	Very Difficult 7
How easy/difficult was this decision to make?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

That's it ! we are done with all the customer requests! Thank You Very much for taking the time to complete this survey.

Appendix 2

Field Experiment

Below is the experiment conducted via qualtrics. It contains the informed consent form, the "high with customer-relationship information" block, the "medium with customer-relationship information" block, and the "low with no customer-relationship information" block to demonstrate the variation in the manipulations

Georgia State University

Department of Marketing

Informed Consent

Title: **Evaluating Decision Making In Customer Disputes**

Principal Investigator: Dr. Pam Ellen

Student Principal Investigator: Stephen Ichatha

Sponsor:

I. Purpose:

You are invited to participate in a project to test whether it is practical to use crowdsourced employees as customer service representatives for certain tasks– that is, can companies effectively use people in online workforces to help them address some customer service issues. The purpose of this project is to determine if online, freelance employees would find training and processing instructions clear and be able to make good quality decisions. A total of 240 people will be recruited for this project. Participation will require less than 30 minutes of your time over one sitting

II. Procedures:

If you decide to participate, you will first be asked some questions about yourself so that we can understand the characteristics of people who might choose to do these types of jobs. Then you will complete training on the types of tasks that might be performed by certain customer service agents. Upon completion of the training, you will review and make decisions on 13 customer refund requests, followed by a brief survey about your experience. The entire job will be performed one time online, taking less than 30 minutes. If you complete the training

successfully, follow the instructions in making the decisions and complete the project, you will receive \$3.50 for your efforts. There are no further requirements.

III. Risks:

In this job, you will not have any more risks than you would in a normal day of life.

IV. Benefits:

Beyond the payment, participation in this project may not benefit you personally. We hope to gain information about how people in an online, freelance situation react to the training and what types of decisions they make. We also learn something about the characteristics of people who might choose this type of job. The information you provide may help managers design work environments that allow them to use a different type of workforce for some jobs.

V. Voluntary Participation and Withdrawal:

Participation in this project is voluntary. You do not have to be in this project. If you decide to be in the project and change your mind, you have the right to drop out at any time. You may skip questions or stop participating at any time. Whatever you decide, you will not lose any benefits to which you are otherwise entitled.

VI. Confidentiality:

We will keep your records private to the extent allowed by law. Pam Ellen (Principal Investigator) and Stephen Ichatha (Student Principal Investigator) will have access to the information you provide. Information may also be shared with those who make sure the study is done correctly (GSU Institutional Review Board, the Office for Human Research Protection (OHRP)). We will **not** collect any identifiable information from you (e.g., your name, social security number, home address, or the like). As this study will be completed online, your IP address will be recorded. However, this data will be destroyed when data collection is completed. Moreover, the results of this study will be summarized and reported in group form. You will not be identified personally. Your name and other facts that might point to you will not appear when we present this study or publish its results. The findings will be summarized and reported in group form. You will not be identified personally.

VII. Contact Persons:

Contact Pam Ellen at pellen@gsu.edu at (404)918-7730 or Stephen Ichatha at (678)457-0848 at sichatha@student.gsu.edu if you have questions, concerns, or complaints about this study. You can also call if think you have been harmed by the study. Call Susan Vogtner in the Georgia State University Office of Research Integrity at 404-413-3513 or svogtner1@gsu.edu if you want to talk to someone who is not part of the study team. You can talk about questions, concerns, offer input, obtain information, or suggestions about the study. You can also call Susan Vogtner if you have questions or concerns about your rights in this study.

VIII. Copy of Consent Form to Subject:

You may print or save this screen for your records.

If you agree to participate in this research, please click “Yes” below.

Q2 I have read, understood, and, if desired, printed a copy of the above consent form and desire of my own free will to participate in this study.

- Yes
- No

HIGH WITH INFO

Q3 We will start by asking you a few questions about yourself. Please answer them to the best of your ability. There are no right or wrong answers.

Q4 In general, I see myself as someone who...	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4			Strongly Agree 7
Has an active imagination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has few artistic interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does a thorough job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tends to be lazy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is generally trusting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tends to find fault with others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is relaxed, handles stress well	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gets nervous easily	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is outgoing, sociable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is reserved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Will be able to achieve most of the goals that I have set for myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When facing difficult tasks, is certain that I will accomplish them	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can succeed at most any endeavor to which I set my mind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels very positive about myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels a great deal of self-respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequently agonizes over decisions I	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

make							
Often wonders if I've made the right decision	<input type="radio"/>						
Believes important decisions should be made by management, not by me	<input type="radio"/>						
Believes I should go along with my management's advice even if I disagree with it	<input type="radio"/>						
Believes I should feel free to make everyday job decisions	<input type="radio"/>						

Q5 Thank you for answering those preliminary questions. Now - let's get to work.

This is a project about how a company might handle some customer service requests by recruiting temporary employees in online workplaces (crowdsourcing). Here's how it might work at a cell phone company that wants to crowdsource some customer service requests for refund..

- The company receives a refund request via the internet
- A refund request file is then created
- Information from the customer's history with the company is added to the file
- A customer service representative would then see a screen with all this information

Q6 Based on the training and information they are given, the customer service representative would have to decide how to deal with the request. For example, they might:

- approve or disapprove a request
- decide how much money, if any to refund, or
- send a request to a supervisor or manager for further consideration

We will begin by providing training on the customer service request, before proceeding with the task of processing the refunds.

Q7 TRAINING MODULE: To be a temporary customer service representative, a person must go through some training on the company's system, and on how to make decisions.

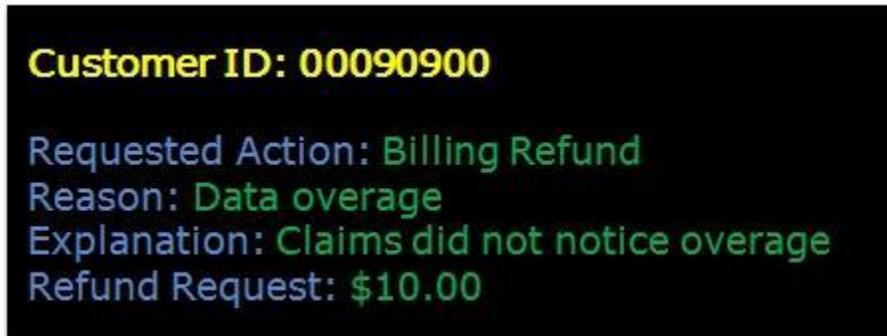
You will now participate in some of the training and then respond to the situations presented.

The next pages will explain how to read each section of the customer service request. Please read these carefully and answer the questions provided.

Q8 In the top left corner of the customer request record is the "Customer ID" Section (see below). It includes:

- Customer identification (ID) number or the unique number assigned to that customer.
- The requested actions. All of the ones you will see are requests for a refund to their bill
- The reason they are requesting the refund, chosen from a set of possible reasons
- Any explanation the customer may offer
- The amount of refund requested

Q9 "Customer ID" Section:



Q10 In the lower left corner of the record is the Account Usage information (see below). When customers sign up with a cell phone company, they agree to a monthly fee based on how much time they want for talking, texting, or using the internet (called data) on their phone. This portion of the refund request file tells you:

- What percentage of their total time for talk, text or data plan was used at the end of the billing period
- If they go over their agreed allotment on one or more, they will be charged "Additional Charges" for "overage."
- The cell phone company texts people when they are approaching their limits
- And if a person used more than 100% of some part of their plan, the screen shows which portion of their plan went over
- The screen also shows "Additional Charges"

Q11 "Account Usage" Section:



Q12 On the top right corner of the record is the "Plan Change" information (see below), and contains information on any plan (or contract) changes the customer has requested in the last 6 months. When customers sign up with a cell phone company, they have the option to change their talk, text, or data plan at any time. The screen also tells the customer service representative whether the customer has purchased a new handset (phone) within the last six months. There will be a "Yes" if the customer has:

- Increased or decreased the time for their talk, text or data plan.
- Purchased a new handset (or phone)
- Whether or not they purchased replacement warranty for the new handset (or phone)

In the industry, increases are often called "upgrades" and decreases are called "downgrades."

Q13 "Plan Changes" Section:



Q14 The final portion of the request file is the bottom right of the screen. This "Additional Customer information" includes:

- How long in months they have been a customer
- Whether they have requested other refunds in past 6 months
- Whether any billing adjustments were made in the past 6 months, or
- Any notes from such previous customer service contacts

Q15 "Additional Information" Section



Q16 Now that you've had an opportunity to review the four sections of the Customer Refund Request, please review the entire refund request below and answer the following questions

Customer ID: 00090900	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: Claims did not notice overage	Change in Data plan: No
Refund Request: \$10.00	Purchased new handset: No
Account Usage Information:	Additional Customer Information
% Talk Plan Used: 50%	Months as customer: 74
% Text Plan Used: 43%	Refund request past six months: 0
% Data Plan Used: 110%	Prior adjustments past six months: 0
Additional Charges: \$10.00	Agent notes last six months: None

Q17 How much of a refund is this person requesting?

- \$10
- \$110
- \$43
- Don't know/Not sure

Q18 Which of the following plans have the exceeded?

- Talk Plan
- Text Plan
- Data Plan
- Don't know/Not sure

Q19 Have they purchased a new handset within last six months?

- Yes
- No
- Don't know/Not sure

Q20 How many months have they been a customer?

Q21 Congratulations! You have now completed the training portion on how to read the customer refund requests. Now that you understand the customer request refund screen, let's do some training on the actual scenarios you expect to receive.

We are a service-oriented company that strives to provide superior customer service. Our policy states:

- We care about customer satisfaction
- We want to address concerns fairly. This means determine the facts, assess the customer's concerns and make an appropriate decision.
- We trust you, our customer service representative, to make a good decision.
- If you feel you cannot make the decision, you can forward the request to a supervisor or manager.
- A manager reviews all decisions to be sure the decision is reasonable given the customer's contract and monitors customer service costs.

Following are some guidelines typically given to customer service representatives. They include some decision restrictions that you may want to jot down on a piece of paper.

In the next section, you will see a number of scenarios. The scenarios are based on typical customer service refund requests, and they vary for each scenario. Please read each refund request file carefully, then process the requests that follow.

Q22 Please click on the arrow below to continue with the job. DO NOT click on any of the scale items that are labeled 1 - 7

	1	2	3	4	5	6	7
Do not click on any items in the scale	<input type="radio"/>						

Q23 PROCESSING INSTRUCTIONS:

When you receive a request, you are to review the request and the facts, and use them to make a refund decision using the options below:

- “Deny Refund” if you think the customer request is NOT justified
- “Approve Refund” and indicate how much (you may refund all or some amount requested).

There is NO limit on the refund per case. It is at your discretion, however:

- You cannot refund more than is being requested.
- It is unusual to exceed \$150 across a typical 10 cases (average \$15 per case)

Q24 Given the customer request processing instructions, how confident are you that ...

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
You can perform the job successfully	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
You can make good decisions in regards to the job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q25 You will now be presented with 3 customer service requests to determine whether or not you understood the criteria for processing the refund requests.

Please take your time, and make sure you follow the processing instructions below when determining what decision to make (you may want to write this down):

For each request, you are to review the request and the facts, and use them to make a decision using the options below:

- “Deny Refund” if you think request is not justified
- “Approve Refund” and indicate how much (you may refund all or some amount requested).

There is NO limit on the refund per case. It is at your discretion, however:

- You cannot refund more than is being requested.
- It is unusual to exceed \$150 across a typical 10 cases (average \$15 per case)

Customer ID: 00090900	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: Claims did not notice overage	Change in Data plan: No
Refund Request: \$10.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50%	Months as customer: 74
% Text Plan Used: 43%	Refund request past six months: 0
% Data Plan Used: 110%	Prior adjustments past six months: 0
Additional Charges: \$10.00	Agent notes last six months: None

Q26 As a reminder, you can deny refund if you think request is not justified. You cannot refund more than is being requested . What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Customer ID: 000856798

Requested Action: **Billing Refund**
Reason: **Text overage**
Explanation: **None**
Refund Request: **\$15.00**

Plan Changes last six months:

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **Yes**
Purchased new handset: **No**

Account Information:

% Talk Plan Used: **47%**
% Text Plan Used: **113%**
% Data Plan Used: **90%**
Additional Charges: **\$15.00**

Additional Customer Information

Months as customer: **6**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months:
• **Customer moved to higher data plan**

Q27 As a reminder, you can deny refund if you think request is not justified. You cannot refund more than is being requested What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Customer ID: 00190978

Requested Action: Billing Refund
Reason: Voice overage
Explanation: Claims home phone stopped working during Hurricane Sandy and had to switch to all cell phone calls
Refund Request: \$15.00

Plan Changes last six months:

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: No

Account Information:

% Talk Plan Used: 150%
% Text Plan Used: 93%
% Data Plan Used: 85%
Additional Charges: \$15.00

Additional Customer Information

Months as customer: 24
Refund request past six months: 2
Prior adjustments past six months: 2
Agent notes last six months:
• Asked customer to move to higher data plan due to overage
• Customer opted not to move to higher plan

Q28 As a reminder, you can deny refund if you think request is not justified. You cannot refund more than is being requested What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q29 Please wait a few seconds while we load the customer refund requests... As you wait, please write down the six-digit code in the bottom right of the screen



111875

Q30 Timing

First Click

Last Click

Page Submit

Click Count

Q31 The customer requests have now loaded. Please click on the link below to begin processing the customer refund requests:

Q32 Timing

First Click

Last Click

Page Submit

Click Count

Customer ID: 00054923

Requested Action: Billing Refund
Reason: Defective Phone
Explanation: Claims defective phone – requesting credit for price of phone
Refund Request: \$75

Plan Changes last six months:

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: Yes

Account Information:

% Talk Plan Used: 50%
% Text Plan Used: 43%
% Data Plan Used: 90%
Additional Charges: \$0.00

Additional Customer Information

Months as customer: 24
Refund request past six months: 0
Prior adjustments past six months: 0
Agent notes last six months:
• Customer purchased 2 year full phone replacement warranty

Q33 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q34 Timing

Customer ID: 00343101

Requested Action: Billing Refund
Reason: Claims erroneous overage charge of \$75
Explanation: None
Refund Request: \$75.00

Plan Changes last six months:

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: No

Account Information:

% Talk Plan Used: 50%
% Text Plan Used: 43%
% Data Plan Used: 80%
Additional Charges: \$0.00

Additional Customer Information

Months as customer: 36
Refund request past six months: 0
Prior adjustments past six months: 0
Agent notes last six months: No

Q35 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q36 Timing

Customer ID: 00043200	Plan Changes last six months:
Requested Action: Billing Refund Reason: Data overage Explanation: Claims family member responsible for running up charge Refund Request: \$30.00	Change in Talk plan: Yes Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 200% Additional Charges: \$30.00	Months as customer: 6 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer converted to talk share plan

Q37 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q38 Timing

Customer ID: 000856798	Plan Changes last six months:
Requested Action: Billing Refund Reason: Text overage Explanation: None Refund Request: \$25.00	Change in Talk plan: No Change in Text plan: No Change in Data plan: Yes Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 47% % Text Plan Used: 213% % Data Plan Used: 90% Additional Charges: \$25.00	Months as customer: 16 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer requested lower data plan

Q39 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q40 Timing

Customer ID: 00054923 Requested Action: Billing Refund Reason: Defective Phone Explanation: Dropped phone in water – requesting credit for price of phone Refund Request: \$50.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 90% Additional Charges: \$0.00	Additional Customer Information Months as customer: 28 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer opted not to purchase 2 year full phone replacement warranty

Q41 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q42 Please wait a few seconds while we record your decisions...

Q43 Timing

Q44 Timing

Customer ID: 00095700 Requested Action: Billing Refund Reason: Data overage Explanation: No Refund Request: \$45.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: Yes Purchased new handset: No
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 300% Additional Charges: \$45.00	Additional Customer Information Months as customer: 16 Refund request past six months: 3 Prior adjustments past six months: 2 Agent notes last six months: • Customer opted to move to lower data plan to reduce monthly bill

Q45 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q46 Timing

Customer ID: 00107700 Requested Action: Billing Refund Reason: Text overage Explanation: Claims international texting Refund Request: \$15.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: N Purchased new handset: No
Account Information: % Talk Plan Used: 60% % Text Plan Used: 113% % Data Plan Used: 87% Additional Charges: \$15.00	Additional Customer Information Months as customer: 6 Refund request past six months: 2 Prior adjustments past six months: 1 Agent notes last six months: • Customer enquired about International texting and was given rate plan

Q47 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q48 Timing

Customer ID: 02565700 Requested Action: Billing Refund Reason: Data overage/Defective Phone Explanation: Claims defective phone used up data plan by constantly accessing Internet Refund Request: \$1000.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: Yes
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 2000% Additional Charges: \$1000.00	Additional Customer Information Months as customer: 2 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months:

Q49 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q50 Timing

Customer ID: 04675700 Requested Action: Billing Refund Reason: Talk overage Explanation: Claims unlimited talk plan Refund Request: \$55.00	Plan Changes last six months: Change in Talk plan: Yes Change in Text plan: Yes Change in Data plan: Yes Purchased new handset: No
Account Information: % Talk Plan Used: 150% % Text Plan Used: 43% % Data Plan Used: 70% Additional Charges: \$55.00	Additional Customer Information Months as customer: 20 Refund request past six months: 1 Prior adjustments past six months: 1 Agent notes last six months: • Customer upgraded to unlimited talk, text and data plan

Q51 What Decision would you make? Deny Refund

- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q52 Timing

Customer ID: 04566800 Requested Action: Billing Refund Reason: Text Overage Explanation: Claims did not exceed text plan Refund Request: \$5.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information: % Talk Plan Used: 75% % Text Plan Used: 23% % Data Plan Used: 50% Additional Charges: \$5.00	Additional Customer Information Months as customer: 26 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months:

Q53 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q54 Please wait a few seconds while we record your decisions...

Q56 Thinking back to the job that you just performed, please respond to the following questions in regards to the tasks...

	Strongly Disagree 1	2	3	Neither Agree nor Disagree 4	5	6	Strongly Agree 7
I had the decision authority to accomplish my job in an effective manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
While doing this job, I felt that I had the authority to make decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer related information available to help me make a good decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer related information available to determine the best course of action	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q57 We are almost done, just a few more questions...Thinking back to the job that you just performed, please respond to the following questions. Remember, there are no right or wrong answers - we just want your honest opinion in regards to the tasks...

	Strongly Disagree 1	2	3	Neither Agree nor Disagree 4	5	6	Strongly Agree 7
I had the	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<p>decision authority to accomplish my job in an effective manner</p> <p>While doing this job, I felt that I had the authority to make decision</p> <p>I had enough customer information available to help me make a good decision</p> <p>I had enough customer information available to determine the best course of action</p> <p>I was confident about my ability to do the job</p> <p>I mastered the skills necessary for my job</p> <p>I was self-assured about my capabilities to perform my job</p> <p>The job that I did was important to me</p> <p>The job that I did was meaningful to</p>	○	○	○	○	○	○	○
--	---	---	---	---	---	---	---

me							
My impact on what happened in this job was large	<input type="radio"/>						
I had a great deal of control over what happened in this job	<input type="radio"/>						
I had significant influence over what happened in this task	<input type="radio"/>						
I had significant autonomy in determining how I did my job	<input type="radio"/>						
I could decide on my own how to go about doing my job	<input type="radio"/>						
I had considerable opportunity for independence and freedom in how I did my job	<input type="radio"/>						
All in all, I was satisfied with this job	<input type="radio"/>						
In general, I liked this job	<input type="radio"/>						
If offered this job on a regular basis, I would be willing to sign up	<input type="radio"/>						
If offered this	<input type="radio"/>						

job on a regular basis, I would be willing to recommend it to a friend							
I thought that this job was very demanding	<input type="radio"/>						
I thought that this job was hard work	<input type="radio"/>						

Q58 After completing this job, how do you feel right now, at this moment. There are no right or wrong answers

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
I feel calm	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am tense	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel upset	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am relaxed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am worried	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q59 Think about the how the decisions you made affect the customers. Would you consider the decisions...?

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
Reasonable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Just	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q60 Think about the hours you work in a typical week. What percentage (%) of those hours are spent doing work like this i.e. independent on-line work...?

_____ 0-100%

Q61 In a typical week, how many hours do you spend doing work like this i.e. independent on-line work...?

- 0 - 10
- 11 - 20
- 21 - 30
- 31 - 40
- Over 40

Q62 In the past 6 months...

	Not At All1	2	3	Routinely 4	5	6	Frequently7
how often have you performed a paid crowdsource task...?	<input type="radio"/>						

Q63 Are you...?

- Male
- Female

Q64

	Elementary 1	Some High School 2	High School Diploma 3	Some College 4	College Degree 5	Some Graduate Studies 6	Graduate Degree 7
What is your highest level of education...?	<input type="radio"/>	<input type="radio"/>					

Q65 In what year were you born?

Q66 Please write down the code you saw on the graphic?

Thank You for taking the time to complete this project. Your responses will be processed, and you will receive full payment if the decisions you make are deemed of good quality.

Please enter the completion code **P@M\$TEP** to receive your payment

MEDIUM WITH INFO

Q3 We will start by asking you a few questions about yourself. Please answer them to the best of your ability. There are no right or wrong answers.

Q4 In general, I see myself as someone who...	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4			Strongly Agree 7
Has an active imagination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has few artistic interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does a thorough job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tends to be lazy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is generally trusting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tends to find fault with others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is relaxed, handles stress well	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gets nervous easily	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is outgoing, sociable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is reserved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Will be able to achieve most of the goals that I have set for myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When facing difficult tasks, is certain that I will accomplish them	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can succeed at most any endeavor to which I set my mind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels very positive about myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels a great deal of self-respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequently agonizes over decisions I	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

make							
Often wonders if I've made the right decision	<input type="radio"/>						
Believes important decisions should be made by management, not by me	<input type="radio"/>						
Believes I should go along with my management's advice even if I disagree with it	<input type="radio"/>						
Believes I should feel free to make everyday job decisions	<input type="radio"/>						

Q5 Thank you for answering those preliminary questions. Now - let's get to work.

This is a project about how a company might handle some customer service requests by recruiting temporary employees in online workplaces (crowdsourcing). Here's how it might work at a cell phone company that wants to crowdsource some customer service requests for refund..

- The company receives a refund request via the internet
- A refund request file is then created
- Information from the customer's history with the company is added to the file
- A customer service representative would then see a screen with all this information

Q6 Based on the training and information they are given, the customer service representative would have to decide how to deal with the request. For example, they might:

- approve or disapprove a request
- decide how much money, if any to refund, or
- send a request to a supervisor or manager for further consideration

We will begin by providing training on the customer service request, before proceeding with the task of processing the refunds.

Q7 TRAINING MODULE: To be a temporary customer service representative, a person must go through some training on the company's system, and on how to make decisions.

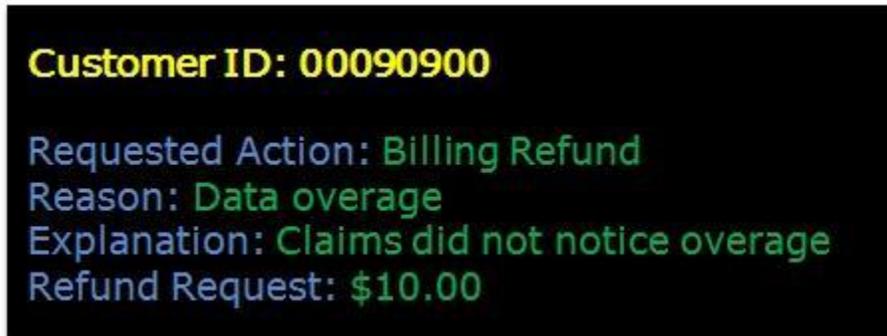
You will now participate in some of the training and then respond to the situations presented.

The next pages will explain how to read each section of the customer service request. Please read these carefully and answer the questions provided.

Q8 In the top left corner of the customer request record is the "Customer ID" Section (see below). It includes:

- Customer identification (ID) number or the unique number assigned to that customer.
- The requested actions. All of the ones you will see are requests for a refund to their bill
- The reason they are requesting the refund, chosen from a set of possible reasons
- Any explanation the customer may offer
- The amount of refund requested

Q9 "Customer ID" Section:



Q10 In the lower left corner of the record is the Account Usage information (see below). When customers sign up with a cell phone company, they agree to a monthly fee based on how much time they want for talking, texting, or using the internet (called data) on their phone. This portion of the refund request file tells you:

- What percentage of their total time for talk, text or data plan was used at the end of the billing period
- If they go over their agreed allotment on one or more, they will be charged "Additional Charges" for "overage."
- The cell phone company texts people when they are approaching their limits
- And if a person used more than 100% of some part of their plan, the screen shows which portion of their plan went over
- The screen also shows "Additional Charges"

Q11 "Account Usage" Section:



Q12 On the top right corner of the record is the "Plan Change" information (see below), and contains information on any plan (or contract) changes the customer has requested in the last 6 months. When customers sign up with a cell phone company, they have the option to change their talk, text, or data plan at any time. The screen also tells the customer service representative whether the customer has purchased a new handset (phone) within the last six months. There will be a "Yes" if the customer has:

- Increased or decreased the time for their talk, text or data plan.
- Purchased a new handset (or phone)
- Whether or not they purchased replacement warranty for the new handset (or phone)

In the industry, increases are often called "upgrades" and decreases are called "downgrades."

Q13 "Plan Changes" Section:



Q14 The final portion of the request file is the bottom right of the screen. This "Additional Customer information" includes:

- How long in months they have been a customer
- Whether they have requested other refunds in past 6 months
- Whether any billing adjustments were made in the past 6 months, or
- Any notes from such previous customer service contacts

Q15 "Additional Information" Section



Q16 Now that you've had an opportunity to review the four sections of the Customer Refund Request, please review the entire refund request below and answer the following questions

Customer ID: 00090900	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: Claims did not notice overage	Change in Data plan: No
Refund Request: \$10.00	Purchased new handset: No
Account Usage Information:	Additional Customer Information
% Talk Plan Used: 50%	Months as customer: 74
% Text Plan Used: 43%	Refund request past six months: 0
% Data Plan Used: 110%	Prior adjustments past six months: 0
Additional Charges: \$10.00	Agent notes last six months: None

Q17 How much of a refund is this person requesting?

- \$10
- \$110
- \$43
- Don't know/Not sure

Q18 Which of the following plans have the exceeded?

- Talk Plan
- Text Plan
- Data Plan
- Don't know/Not sure

Q19 Have they purchased a new handset within last six months?

- Yes
- No
- Don't know/Not sure

Q20 How many months have they been a customer?

Q21 Congratulations! You have now completed the training portion on how to read the customer refund requests. Now that you understand the customer request refund screen, let's do some training on the actual scenarios you expect to receive.

We are a service-oriented company that strives to provide superior customer service. Our policy states:

- We care about customer satisfaction
- We want to address concerns fairly. This means determine the facts, assess the customer's concerns and make an appropriate decision.
- We trust you, our customer service representative, to make a good decision.
- If you feel you cannot make the decision, you can forward the request to a supervisor or manager.
- A manager reviews all decisions to be sure the decision is reasonable given the customer's contract and monitors customer service costs.

Following are some guidelines typically given to customer service representatives. They include some decision restrictions that you may want to jot down on a piece of paper.

In the next section, you will see a number of scenarios. The scenarios are based on typical customer service refund requests, and they vary for each scenario. Please read each refund request file carefully, then process the requests that follow.

Q22 Please click on the arrow below to continue with the job. DO NOT click on any of the scale items that are labeled 1 - 7

	1	2	3	4	5	6	7
Do not click on any items in the scale	<input type="radio"/>						

Q23 PROCESSING INSTRUCTIONS:

When you receive a request, you are to review the request and the facts, and use them to make a refund decision using the options below:

- “Deny Refund” if you think the customer request is **NOT** justified
- “Approve Refund” and indicate how much (you may refund all or some amount requested).
- “Refer” to supervisor or manager at your discretion

There is a **\$15 limit** on the refund per case, and you **cannot refund more** than is being requested.

Q24 Given the customer request processing instructions, how confident are you that ...

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
You can perform the job successfully	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
You can make good decisions in regards to the job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q25 You will now be presented with 3 customer service requests to determine whether or not you understood the criteria for processing the refund requests.

Please take your time, and make sure you follow the processing instructions below when determining what decision to make (you may want to write this down):

For each request, you are to review the request and the facts, and use them to make a refund decision using the options below:

- “Deny Refund” if you think the customer request is **NOT** justified
- “Approve Refund” and indicate how much (you may refund all or some amount requested).
- “Refer” to supervisor or manager at your discretion

There is a **\$15 limit** on the refund per case, and you **cannot refund more** than is being requested.

Customer ID: 00090900	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: Claims did not notice overage	Change in Data plan: No
Refund Request: \$10.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50%	Months as customer: 74
% Text Plan Used: 43%	Refund request past six months: 0
% Data Plan Used: 110%	Prior adjustments past six months: 0
Additional Charges: \$10.00	Agent notes last six months: None

Q26 As a reminder, you can deny refund if you think request is not justified. You cannot refund more than is being requested. \$15 limit per request. What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Customer ID: 000856798

Requested Action: **Billing Refund**
Reason: **Text overage**
Explanation: **None**
Refund Request: **\$15.00**

Plan Changes last six months:

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **Yes**
Purchased new handset: **No**

Account Information:

% Talk Plan Used: **47%**
% Text Plan Used: **113%**
% Data Plan Used: **90%**
Additional Charges: **\$15.00**

Additional Customer Information

Months as customer: **6**
Refund request past six months: **0**
Prior adjustments past six months: **0**
Agent notes last six months:
• **Customer moved to higher data plan**

Q27 As a reminder, you can deny refund if you think request is not justified. You cannot refund more than is being requested. \$15 limit per request. What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Customer ID: 00190978

Requested Action: Billing Refund
Reason: Voice overage
Explanation: Claims home phone stopped working during Hurricane Sandy and had to switch to all cell phone calls
Refund Request: \$15.00

Plan Changes last six months:

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: No

Account Information:

% Talk Plan Used: 150%
% Text Plan Used: 93%
% Data Plan Used: 85%
Additional Charges: \$15.00

Additional Customer Information

Months as customer: 24
Refund request past six months: 2
Prior adjustments past six months: 2
Agent notes last six months:
• Asked customer to move to higher data plan due to overage
• Customer opted not to move to higher plan

Q28 As a reminder, you can deny refund if you think request is not justified. You cannot refund more than is being requested. \$15 limit per request. What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q29 Please wait a few seconds while we load the customer refund requests... As you wait, please write down the six-digit code in the bottom right of the screen



111875

Q30 Timing

First Click

Last Click

Page Submit

Click Count

Q31 The customer requests have now loaded. Please click on the link below to begin processing the customer refund requests:

Q32 Timing

First Click

Last Click

Page Submit

Click Count

Customer ID: 00054923

Requested Action: Billing Refund
Reason: Defective Phone
Explanation: Claims defective phone – requesting credit for price of phone
Refund Request: \$75

Plan Changes last six months:

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: Yes

Account Information:

% Talk Plan Used: 50%
% Text Plan Used: 43%
% Data Plan Used: 90%
Additional Charges: \$0.00

Additional Customer Information

Months as customer: 24
Refund request past six months: 0
Prior adjustments past six months: 0
Agent notes last six months:
• Customer purchased 2 year full phone replacement warranty

Q33 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q34 Timing

Customer ID: 00343101

Requested Action: Billing Refund
Reason: Claims erroneous overage charge of \$75
Explanation: None
Refund Request: \$75.00

Plan Changes last six months:

Change in Talk plan: No
Change in Text plan: No
Change in Data plan: No
Purchased new handset: No

Account Information:

% Talk Plan Used: 50%
% Text Plan Used: 43%
% Data Plan Used: 80%
Additional Charges: \$0.00

Additional Customer Information

Months as customer: 36
Refund request past six months: 0
Prior adjustments past six months: 0
Agent notes last six months: No

Q35 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q36 Timing

Customer ID: 00043200	Plan Changes last six months:
Requested Action: Billing Refund Reason: Data overage Explanation: Claims family member responsible for running up charge Refund Request: \$30.00	Change in Talk plan: Yes Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 200% Additional Charges: \$30.00	Months as customer: 6 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer converted to talk share plan

Q37 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q38 Timing

Customer ID: 000856798	Plan Changes last six months:
Requested Action: Billing Refund Reason: Text overage Explanation: None Refund Request: \$25.00	Change in Talk plan: No Change in Text plan: No Change in Data plan: Yes Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 47% % Text Plan Used: 213% % Data Plan Used: 90% Additional Charges: \$25.00	Months as customer: 16 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer requested lower data plan

Q39 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q40 Timing

Customer ID: 00054923 Requested Action: Billing Refund Reason: Defective Phone Explanation: Dropped phone in water – requesting credit for price of phone Refund Request: \$50.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 90% Additional Charges: \$0.00	Additional Customer Information Months as customer: 28 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months: • Customer opted not to purchase 2 year full phone replacement warranty

Q41 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q42 Please wait a few seconds while we record your decisions...

Q43 Timing

Q44 Timing

Customer ID: 00095700 Requested Action: Billing Refund Reason: Data overage Explanation: No Refund Request: \$45.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: Yes Purchased new handset: No
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 300% Additional Charges: \$45.00	Additional Customer Information Months as customer: 16 Refund request past six months: 3 Prior adjustments past six months: 2 Agent notes last six months: • Customer opted to move to lower data plan to reduce monthly bill

Q45 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q46 Timing

Customer ID: 00107700 Requested Action: Billing Refund Reason: Text overage Explanation: Claims international texting Refund Request: \$15.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: N Purchased new handset: No
Account Information: % Talk Plan Used: 60% % Text Plan Used: 113% % Data Plan Used: 87% Additional Charges: \$15.00	Additional Customer Information Months as customer: 6 Refund request past six months: 2 Prior adjustments past six months: 1 Agent notes last six months: • Customer enquired about International texting and was given rate plan

Q47 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q48 Timing

Customer ID: 02565700 Requested Action: Billing Refund Reason: Data overage/Defective Phone Explanation: Claims defective phone used up data plan by constantly accessing Internet Refund Request: \$1000.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: Yes
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 2000% Additional Charges: \$1000.00	Additional Customer Information Months as customer: 2 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months:

Q49 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q50 Timing

Customer ID: 04675700 Requested Action: Billing Refund Reason: Talk overage Explanation: Claims unlimited talk plan Refund Request: \$55.00	Plan Changes last six months: Change in Talk plan: Yes Change in Text plan: Yes Change in Data plan: Yes Purchased new handset: No
Account Information: % Talk Plan Used: 150% % Text Plan Used: 43% % Data Plan Used: 70% Additional Charges: \$55.00	Additional Customer Information Months as customer: 20 Refund request past six months: 1 Prior adjustments past six months: 1 Agent notes last six months: • Customer upgraded to unlimited talk, text and data plan

Q51 What Decision would you make? Deny Refund

- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q52 Timing

Customer ID: 04566800 Requested Action: Billing Refund Reason: Text Overage Explanation: Claims did not exceed text plan Refund Request: \$5.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information: % Talk Plan Used: 75% % Text Plan Used: 23% % Data Plan Used: 50% Additional Charges: \$5.00	Additional Customer Information Months as customer: 26 Refund request past six months: 0 Prior adjustments past six months: 0 Agent notes last six months:

Q53 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q54 Please wait a few seconds while we record your decisions...

Q56 Thinking back to the job that you just performed, please respond to the following questions in regards to the tasks...

	Strongly Disagree 1	2	3	Neither Agree nor Disagree 4	5	6	Strongly Agree 7
I had the decision authority to accomplish my job in an effective manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
While doing this job, I felt that I had the authority to make decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer related information available to help me make a good decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer related information available to determine the best course of action	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q57 We are almost done, just a few more questions...Thinking back to the job that you just performed, please respond to the following questions. Remember, there are no right or wrong answers - we just want your honest opinion in regards to the tasks...

	Strongly Disagree 1	2	3	Neither Agree nor Disagree 4	5	6	Strongly Agree 7
I had the	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<p>decision authority to accomplish my job in an effective manner</p> <p>While doing this job, I felt that I had the authority to make decision</p> <p>I had enough customer information available to help me make a good decision</p> <p>I had enough customer information available to determine the best course of action</p> <p>I was confident about my ability to do the job</p> <p>I mastered the skills necessary for my job</p> <p>I was self-assured about my capabilities to perform my job</p> <p>The job that I did was important to me</p> <p>The job that I did was meaningful to</p>	○	○	○	○	○	○	○
--	---	---	---	---	---	---	---

me							
My impact on what happened in this job was large	<input type="radio"/>						
I had a great deal of control over what happened in this job	<input type="radio"/>						
I had significant influence over what happened in this task	<input type="radio"/>						
I had significant autonomy in determining how I did my job	<input type="radio"/>						
I could decide on my own how to go about doing my job	<input type="radio"/>						
I had considerable opportunity for independence and freedom in how I did my job	<input type="radio"/>						
All in all, I was satisfied with this job	<input type="radio"/>						
In general, I liked this job	<input type="radio"/>						
If offered this job on a regular basis, I would be willing to sign up	<input type="radio"/>						
If offered this	<input type="radio"/>						

job on a regular basis, I would be willing to recommend it to a friend							
I thought that this job was very demanding	<input type="radio"/>						
I thought that this job was hard work	<input type="radio"/>						

Q58 After completing this job, how do you feel right now, at this moment. There are no right or wrong answers

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
I feel calm	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am tense	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel upset	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am relaxed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am worried	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q59 Think about the how the decisions you made affect the customers. Would you consider the decisions...?

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
Reasonable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Just	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q60 Think about the hours you work in a typical week. What percentage (%) of those hours are spent doing work like this i.e. independent on-line work...?

_____ 0-100%

Q61 In a typical week, how many hours do you spend doing work like this i.e. independent on-line work...?

- 0 - 10
- 11 - 20
- 21 - 30
- 31 - 40
- Over 40

Q62 In the past 6 months...

	Not At All1	2	3	Routinely 4	5	6	Frequently7
how often have you performed a paid crowdsource task...?	<input type="radio"/>						

Q63 Are you...?

- Male
- Female

Q64

	Elementary 1	Some High School 2	High School Diploma 3	Some College 4	College Degree 5	Some Graduate Studies 6	Graduate Degree 7
What is your highest level of education...?	<input type="radio"/>	<input type="radio"/>					

Q65 In what year were you born?

Q66 Please write down the code you saw on the graphic?

Thank You for taking the time to complete this project. Your responses will be processed, and you will receive full payment if the decisions you make are deemed of good quality.

Please enter the completion code **P@M\$TEP** to receive your payment

LOW WITH NO INFO

Q3 We will start by asking you a few questions about yourself. Please answer them to the best of your ability. There are no right or wrong answers.

Q4 In general, I see myself as someone who...

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4			Strongly Agree 7
Has an active imagination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has few artistic interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does a thorough job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tends to be lazy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is generally trusting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tends to find fault with others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is relaxed, handles stress well	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gets nervous easily	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is outgoing, sociable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is reserved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Will be able to achieve most of the goals that I have set for myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When facing difficult tasks, is certain that I will accomplish them	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can succeed at most any endeavor to which I set my mind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels very	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

positive about myself							
Feels a great deal of self-respect	<input type="radio"/>						
Frequently agonizes over decisions I make	<input type="radio"/>						
Often wonders if I've made the right decision	<input type="radio"/>						
Believes important decisions should be made by management, not by me	<input type="radio"/>						
Believes I should go along with my management's advice even if I disagree with it	<input type="radio"/>						
Believes I should feel free to make everyday job decisions	<input type="radio"/>						

Q5 Thank you for answering those preliminary questions. Now - let's get to work.

This is a project about how a company might handle some customer service requests by recruiting temporary employees in online workplaces (crowdsourcing). Here's how it might work at a cell phone company that wants to crowdsource some customer service requests for refund..

- The company receives a refund request via the internet
- A refund request file is then created
- Information from the customer's history with the company is added to the file
- A customer service representative would then see a screen with all this information

Q6 Based on the training and information they are given, the customer service representative would have to decide how to deal with the request. For example, they might:

- approve or disapprove a request
- decide how much money, if any to refund, or
- send a request to a supervisor or manager for further consideration

We will begin by providing training on the customer service request, before proceeding with the task of processing the refunds.

Q7 TRAINING MODULE: To be a temporary customer service representative, a person must go through some training on the company's system, and on how to make decisions.

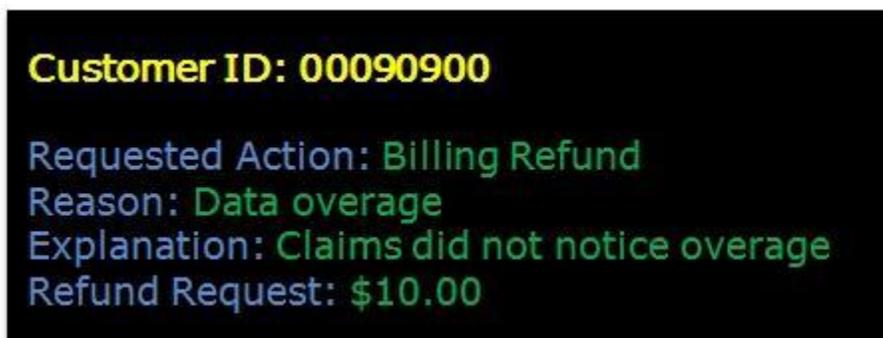
You will now participate in some of the training and then respond to the situations presented.

The next pages will explain how to read each section of the customer service request. Please read these carefully and answer the questions provided.

Q8 In the top left corner of the customer request record is the "Customer ID" Section (see below). It includes:

- Customer identification (ID) number or the unique number assigned to that customer.
- The requested actions. All of the ones you will see are requests for a refund to their bill
- The reason they are requesting the refund, chosen from a set of possible reasons
- Any explanation the customer may offer
- The amount of refund requested

Q9 "Customer ID" Section:



Customer ID: 00090900
Requested Action: Billing Refund
Reason: Data overage
Explanation: Claims did not notice overage
Refund Request: \$10.00

Q10 In the lower left corner of the record is the Account Usage information (see below). When customers sign up with a cell phone company, they agree to a monthly fee based on how much time they want for talking, texting, or using the internet (called data) on their phone. This portion of the refund request file tells you:

- What percentage of their total time for talk, text or data plan was used at the end of the billing period
- If they go over their agreed allotment on one or more, they will be charged "Additional Charges" for "overage."
- The cell phone company texts people when they are approaching their limits
- And if a person used more than 100% of some part of their plan, the screen shows which portion of their plan went over
- The screen also shows "Additional Charges"

Q11 "Account Usage" Section:



Q12 On the top right corner of the record is the "Plan Change" information (see below), and contains information on any plan (or contract) changes the customer has requested in the last 6 months. When customers sign up with a cell phone company, they have the option to change their talk, text, or data plan at any time. The screen also tells the customer service representative whether the customer has purchased a new handset (phone) within the last six months. There will be a "Yes" if the customer has:

- Increased or decreased the time for their talk, text or data plan.
- Purchased a new handset (or phone)
- Whether or not they purchased replacement warranty for the new handset (or phone)

In the industry, increases are often called "upgrades" and decreases are called "downgrades."

Q13 "Plan Changes" Section:



Q16 Now that you've had an opportunity to review the four sections of the Customer Refund Request, please review the entire refund request below and answer the following questions

Customer ID: 00090900	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: Claims did not notice overage	Change in Data plan: No
Refund Request: \$10.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50%	
% Text Plan Used: 43%	
% Data Plan Used: 110%	
Additional Charges: \$10.00	None Available

Q17 How much of a refund is this person requesting?

- \$10
- \$110
- \$43
- Don't know/Not sure

Q18 Which of the following plans have the exceeded?

- Talk Plan
- Text Plan
- Data Plan
- Don't know/Not sure

Q19 Have they purchased a new handset within last six months?

- Yes
- No
- Don't know/Not sure

Q21 Congratulations! You have now completed the training portion on how to read the customer refund requests. Now that you understand the customer request refund screen, let's do some training on the actual scenarios you expect to receive.

We are a service-oriented company that strives to provide superior customer service. Our policy states:

- We care about customer satisfaction
- We want to address concerns fairly. This means determine the facts, assess the customer's concerns and make an appropriate decision.
- We trust you, our customer service representative, to make a good decision.
- If you feel you cannot make the decision, you can forward the request to a supervisor or manager.
- A manager reviews all decisions to be sure the decision is reasonable given the customer's contract and monitors customer service costs.

Following are some guidelines typically given to customer service representatives. They include some decision restrictions that you may want to jot down on a piece of paper.

In the next section, you will see a number of scenarios. The scenarios are based on typical customer service refund requests, and they vary for each scenario. Please read each refund request file carefully, than process the requests that follow.

Q22 Please click on the arrow below to continue with the job. DO NOT click on any of the scale items that are labeled 1 - 7

	1	2	3	4	5	6	7
Do not click on any items in the scale	<input type="radio"/>						

Q23 PROCESSING INSTRUCTIONS:

When you receive a request, you are to review the request and the facts, and use them to make a refund decision using the options below:

- You are **not authorized** to "Deny Refund"
- "Approve Refund" if customer request is for **\$15 or less** regardless of reason
- "**Refer**" if customer request is **more than \$15**:
 - Refer to Supervisor: Overages for only Talk or Text (no Data)
 - Refer to Manager: Overages for Data (alone or in addition to Talk or Text) or for defective phone

Q24 Given the customer request processing instructions, how confident are you that ...

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
You can perform the job successfully	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
You can make good decisions in regards to the job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q25 You will now be presented with 3 customer service requests to determine whether or not you understood the criteria for processing the refund requests.

Please take your time, and make sure you follow the processing instructions below when determining what decision to make (you may want to write this down):

When you receive a request, you are to review the request and the facts, and use them to make a refund decision using the options below:

- You are **not authorized** to “Deny Refund”
- “Approve Refund” if customer request is for **\$15 or less** regardless of reason
- **“Refer”** if customer request is **more than \$15:**
 - Refer to Supervisor: Overages for only Talk or Text (no Data)
 - Refer to Manager: Overages for Data (alone or in addition to Talk or Text) or for defective phone

Customer ID: 00090900

Requested Action: **Billing Refund**
Reason: **Data overage**
Explanation: **Customer says they did not notice overage**
Refund Request: **\$20.00**

Account Information:

% Talk Plan Used: **50%**
% Text Plan Used: **43%**
% Data Plan Used: **120%**
Additional Charges: **\$20.00**

Plan Changes last six months:

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Additional Customer Information

None Available

Q26 *As a reminder, you are not authorized to deny refund. Always approve refund for \$15 or less. Refer if more than \$15.*

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Customer ID: 000856798

Requested Action: **Billing Refund**
Reason: **Text overage**
Explanation: **None provided**
Refund Request: **\$15.00**

Plan Changes last six months:

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **Yes**
Purchased new handset: **No**

Account Information:

% Talk Plan Used: **47%**
% Text Plan Used: **113%**
% Data Plan Used: **90%**
Additional Charges: **\$15.00**

Additional Customer Information

None Available

Q27 *As a reminder, you are not authorized to deny refund. Always approve refund for \$15 or less. Refer if more than \$15.*

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Customer ID: 00190978

Plan Changes last six months:

Requested Action: **Billing Refund**
Reason: **Voice overage**
Explanation: **Customer says home phone stopped working during Hurricane Sandy and he had to switch to all cell phone calls**
Refund Request: **\$15.00**

Change in Talk plan: **No**
Change in Text plan: **No**
Change in Data plan: **No**
Purchased new handset: **No**

Account Information:

Additional Customer Information

% Talk Plan Used: **150%**
% Text Plan Used: **93%**
% Data Plan Used: **85%**
Additional Charges: **\$15.00**

None Available

Q28 *As a reminder, you are not authorized to deny refund. Always approve refund for \$15 or less. Refer if more than \$15*

What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q29 Please wait a few seconds while we load the customer refund requests... As you wait, please write down the six-digit code in the bottom right of the screen



111875

Q30 Timing

Q31 The customer requests have now loaded. Please click on the link below to begin processing the customer refund requests:

Q32 Timing

Customer ID: 00054923 Requested Action: Billing Refund Reason: Defective Phone Explanation: Customer says defective phone – requesting credit for price of phone Refund Request: \$75	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: Yes Full replacement warranty: Yes
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 90% Additional Charges: \$0.00	Additional Customer Information None Available

Q33 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q34 Timing

Customer ID: 00343101 Requested Action: Billing Refund Reason: Customer says erroneous overage charge of \$30 Explanation: None provided Refund Request: \$30.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 80% Additional Charges: \$0.00	Additional Customer Information None Available

Q35 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q36 Timing

Customer ID: 00043200	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: Yes
Reason: Data overage	Change in Text plan: No
Explanation: Customer says family member responsible for running up charge	Change in Data plan: No
Refund Request: \$30.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50%	None Available
% Text Plan Used: 43%	
% Data Plan Used: 200%	
Additional Charges: \$30.00	

Q37 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q38 Timing

Customer ID: 000856798	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Text overage	Change in Text plan: No
Explanation: None provided	Change in Data plan: Yes
Refund Request: \$25.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 47%	None Available
% Text Plan Used: 213%	
% Data Plan Used: 90%	
Additional Charges: \$25.00	

Q39 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q40 Timing

Customer ID: 00054923 Requested Action: Billing Refund Reason: Defective Phone Explanation: Customer says dropped phone in water – requesting credit for phone price Refund Request: \$50.00	Plan Changes last six months: Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: No
Account Information: % Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 90% Additional Charges: \$0.00	Additional Customer Information None Available

Q41 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q42 Please wait a few seconds while we record your decisions...

Q43 Timing

Q44 Timing

Customer ID: 00095700	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Data overage	Change in Text plan: No
Explanation: None provided	Change in Data plan: Yes
Refund Request: \$45.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50%	None Available
% Text Plan Used: 43%	
% Data Plan Used: 300%	
Additional Charges: \$45.00	

Q45 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q46 Timing

Customer ID: 00107700	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Text overage	Change in Text plan: No
Explanation: Customer says charge is for international texting	Change in Data plan: No
Refund Request: \$15.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 60%	None Available
% Text Plan Used: 113%	
% Data Plan Used: 87%	
Additional Charges: \$15.00	

Q47 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q48 Timing

Customer ID: 02565700	Plan Changes last six months:
Requested Action: Billing Refund Reason: Data overage/Defective Phone Explanation: Customer says defective phone used up data plan by constantly accessing Internet Refund Request: \$200.00	Change in Talk plan: No Change in Text plan: No Change in Data plan: No Purchased new handset: Yes Full replacement warranty: No
Account Information:	Additional Customer Information
% Talk Plan Used: 50% % Text Plan Used: 43% % Data Plan Used: 2000% Additional Charges: \$200.00	None Available

Q49 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q50 Timing

Customer ID: 04675700	Plan Changes last six months:
Requested Action: Billing Refund Reason: Talk overage Explanation: Customer says they have unlimited talk plan Refund Request: \$25.00	Change in Talk plan: Yes Change in Text plan: Yes Change in Data plan: Yes Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 150% % Text Plan Used: 43% % Data Plan Used: 70% Additional Charges: \$25.00	None Available

Q51 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q52 Timing

Customer ID: 04566800	Plan Changes last six months:
Requested Action: Billing Refund	Change in Talk plan: No
Reason: Text Overage	Change in Text plan: No
Explanation: Customer says did not exceed text plan	Change in Data plan: No
Refund Request: \$5.00	Purchased new handset: No
Account Information:	Additional Customer Information
% Talk Plan Used: 75%	None Available
% Text Plan Used: 23%	
% Data Plan Used: 50%	
Additional Charges: \$5.00	

Q53 What Decision would you make?

- Deny Refund
- Approve Refund of \$ (enter amount in box) _____
- Refer to Supervisor
- Refer to Manager
- Don't Know/Not sure in situations like this

Q54 Please wait a few seconds while we record your decisions...

Q55 Timing

Q56 Thinking back to the job that you just performed, please respond to the following questions in regards to the tasks...

	Strongly Disagree 1	2	3	4	Neither Agree nor Disagree 5	6	7	8	Strongly Agree 9
I had the decision authority to accomplish my job in an effective manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
While doing this job, I felt that I had the authority to make decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer related information available to help me make a good decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer related information available to determine the best course of action	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q57 We are almost done, just a few more questions...Thinking back to the job that you just performed, please respond to the following questions. Remember, there are no right or wrong answers - we just want your honest opinion in regards to the tasks...

	Strongly Disagree 1	2	3	Neither Agree nor Disagree 4	5	6	Strongly Agree 7
I had the decision authority to accomplish my job in an effective manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
While doing this job, I felt that I had the authority to make decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer information available to help me make a good decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had enough customer information available to determine the best course of action	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I was confident about my ability to do the job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I mastered the skills necessary for my job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I was self-assured about my capabilities to perform my	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

job							
The job that I did was important to me	<input type="radio"/>						
The job that I did was meaningful to me	<input type="radio"/>						
My impact on what happened in this job was large	<input type="radio"/>						
I had a great deal of control over what happened in this job	<input type="radio"/>						
I had significant influence over what happened in this task	<input type="radio"/>						
I had significant autonomy in determining how I did my job	<input type="radio"/>						
I could decide on my own how to go about doing my job	<input type="radio"/>						
I had considerable opportunity for independence and freedom in how I did my job	<input type="radio"/>						
All in all, I was satisfied with this job	<input type="radio"/>						
In general, I	<input type="radio"/>						

liked this job							
If offered this job on a regular basis, I would be willing to sign up	<input type="radio"/>						
If offered this job on a regular basis, I would be willing to recommend it to a friend	<input type="radio"/>						
I thought that this job was very demanding	<input type="radio"/>						
I thought that this job was hard work	<input type="radio"/>						

Q58 After completing this job, how do you feel right now, at this moment. There are no right or wrong answers

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
I feel calm	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am tense	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel upset	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am relaxed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am worried	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q59 Think about the how the decisions you made affect the customers. Would you consider the decisions...?

	Strongly Disagree 1	2	3	Neither Agree Nor Disagree 4	5	6	Strongly Agree 7
Reasonable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Just	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q60 Think about the hours you work in a typical week. What percentage (%) of those hours are spent doing work like this i.e. independent on-line work...?

_____ 0-100%

Q61 In a typical week, how many hours do you spend doing work like this i.e. independent on-line work...?

- 0 - 10
- 11 - 20
- 21 - 30
- 31 - 40
- Over 40

Q62 In the past 6 months...

	Not At All 1	2	3	Routinely 4	5	6	Frequently 7
how often have you performed a paid crowdsource task...?	<input type="radio"/>						

Q63 Are you...?

- Male
- Female

Q64

	Elementary 1	Some High School 2	High School Diploma 3	Some College 4	College Degree 5	Some Graduate Studies 6	Graduate Degree 7
What is your highest level of education...?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q65 In what year were you born?

Q66 Please write down the code you saw on the graphic?

Please enter the completion code **P@M\$TEP** to receive your payment