

OFFICE EFFICIENCIES ELEVATE



OUTLOOK

Access and Ownership

Customer Care Folder

Sales Folder

Osoez Folders

Sales Team	<hr/>
Customer Care	<hr/>
Customer E-Mail	<hr/>
2nd/3rd Request	<hr/>
State to State	<hr/>
Auto Underwriting	<hr/>
CI Assignment G4521	<hr/>
Claims	<hr/>
Fire Underwriting	<hr/>
Internet Leads	<hr/>
Life-Health-Med Exams	<hr/>
SFPP	<hr/>
Flood	<hr/>

OFFICE EFFICIENCIES ELEVATE



**TROPHY CLUB
CONSULTING LLC**

"DISCIPLINE TAKES NO VACATION"

OUTLOOK

Rules

Calendar

Calendar Invites

OFFICE EFFICIENCIES ELEVATE



PHONES

Hard Phones

Soft Phones

Headsets

Speed Dials

ILR	1-855-259-8568
Tech Support	1-877-889-2294
SFPP	1-888-311-7377
Personal Lines	1-844-275-2572
Business Lines	1-866-734-4584
Life	1-877-543-3619
Investments	1-833-593-7109

OFFICE EFFICIENCIES ELEVATE



PHONES

DID Set Up and Call Flow

Main list number/800 number

Call Flow-four rings>>> TBTM>>> back to office if claim or quote>>>service calls generate a TBTM email which is auto forwarded to the Customer Care Folder.

MOAs- ring three times then forward to Legacy mainlist number

Secondary Number on Microsite for SEM

Caller ID Google

Call Flow-Four Rings>>>TBTM>>>Route Back to entire office

Team By The Minute (Promo code trophyclub)

Caller ID Team

Direct Connects- Smart Financial, Datalot, Insurance Quotes

Caller ID Direct

Call Flow>>>Three Rings>>>Two to Entire Team>>>TBTM>>>Route back to entire office

Each Sales Person

Call Flow Two Rings>>>Three Rings to Sales Team>>>TBTM>>>Route back to entire office

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SKYPE GROUPS

Customer Care

Account Reps

Entire Team

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EQUIPMENT LIST

Laptops

Scanners

Printer

Monitors

Vivo Dual LCD LED 13 to 27 inch Monitor Desk Stand

Zoom Pro

OFFICE EFFICIENCIES ELEVATE



EQUIPMENT LIST

Awaw TX2

TVs

Camera

SUPPORT

Chat

ASR

BLRC

Claims

Life

PLCC

SFPP

SF Billing

Support Center

Answers

Auto

Fire

Life

State Farm

AFS
