

CUSTOMER CARE WORKFLOWS



CCR RESPONSIBILITIES SUMMARY

Phone

SF Connect

Customer Care Folder

Task Sheets

CUSTOMER CARE WORKFLOWS



SF CONNECT

Customer Responses

Utilize Templates

Archive and log

Emails that miss OSOEZ and other rules

Direct customer service emails to agent or team members

Phone messages for service

CCR FOLDER

CUSTOMER CARE WORKFLOWS



THE TWO C'S ECRM

Contact Information

Account Note

Quick Links

Policy Information

Activities

CUSTOMER CARE WORKFLOWS



THE TWO C'S NECHO

Premium

Policy Information

Coverage Details

Discounts

Product Line Summary

CUSTOMER CARE WORKFLOWS



THE 4 R'S

Review

Give the Good News first
FORM
SF Info

Remind

Emotional Connection
Re-Educate
Develop Credibility

Recommend

Logical solution to solve problem or meet customer's needs

Retain

Confirm verbal and visual affirmation of solution or recommendation
Thank for business and opportunity to serve
Gain reviews and referrals

CUSTOMER CARE WORKFLOWS



EXPECTATIONS

30-40 Inbound calls recieved

SF Connect immediate/same day response with archive

CCR Folder Complete EOD

Utilize 2Cs and advise customers

Present Life or DI with payments based on needs

Reviews/Referrals/Financial Services
