

OFFICE EFFICIENCIES ELEVATE



OUTLOOK

Access and Ownership

Customer Care Folder (manually create)

Sales Folder (manually create)

OSOez Folders (AFS can Set Up)

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/>
	<hr/>
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OUTLOOK

Rules (iLeads, non-company messages, etc.)

Calendar (Agent = Office Calendar)

Calendar Invites (New Meeting, for 3.0s and 1.0s)

OFFICE EFFICIENCIES ELEVATE


**TROPHY CLUB
CONSULTING LLC**

"DISCIPLINE TAKES NO VACATION"

PHONES

Hard Phones

Soft Phones

Headsets - Anker PowerConf H700 (Amazon.com)

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
Mobile/DSS Support	1-888-559-1922

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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- 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

OFFICE EFFICIENCIES ELEVATE



MS TEAMS GROUPS

Customer Care

Account Reps

Entire Team / MOA

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EQUIPMENT LIST

Laptops

Scanner(s)

Printer

Monitors

Vivo Dual LCD LED 13 to 27 inch Monitor Desk Stand

Zoom Pro (MOA/Remote)

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EQUIPMENT LIST

Mini PC (KAMRUI AK 1PRO - Amazon.com)

TVs

Camera (Logitech C920x - Amazon.com)

SUPPORT

Chat

ASR

BLRC

Claims

Life

PLCC

SFPP

SF Billing

Support Center

Answers

Auto

Fire

Life

State Farm

AFS
