EFFICIENCIES



FOR PROFITABILITY AND PRODUCTIVITY

OUTLOOK

- 1. Access and Ownership
- 2. Shared Folders
 - a. Customer Care Folder (manually create)
 - b. Sales Folder (manually create)
 - c.OSOez Folders
 - i. Leads
 - ii. Auto Underwriting
 - iii. Fire Underwriting
 - iv. Life-Health-Med Exams
 - v.SFPP
 - vi. Flood
 - vii. 2nd/3rd
 - viii. State to state
 - ix.4521
- 3. Rules (iLeads, non-compnay messages, etc.)
- 4. Calendar Agent = Office Calendar
- 5. Calendar Invites (New Leads, 4Rs, etc.)

NOTES			

EFFICIENCIES



FOR PROFITABILITY AND PRODUCTIVITY

PHONES AND TEXTING

- 1. Jabber
- 2. DID Lines
- 3. SFConnect

All Sales Team*	1-XXX-XXX-XXXX		
All Customer Care Team*	1-XXX-XXX-XXXX		
Office Mailbox	1-XXX-XXX-XXXY		
ILR	1-855-259-8568		
Automated Billing	1-800-440-0998		
Tech Support	1-877-889-2294		
SFPP	1-888-311-7377		
DSS/Online Support	1-888-559-1922		
Personal Lines	1-844-275-7522		
Business Lines	1-855-275-2572		
Health	1-866-734-4584		
Life	1-877-543-3619		
Life Policy Change	1-855-878-0300		
Investment Planning	1-833-593-7109		
Leadership Cell	1-XXX-XXX-XXXX		

NOTES

EFFICIENCIES



FOR PROFITABILITY AND PRODUCTIVITY

SUPPORT

- 1. Chat
- 2. Answers
- 3. MS Teams Groups
 - a. Customer Care
 - b. Account Representatives
 - c. All Team / MOA

EQUIPMENT

- 1. Laptops
- 2. Dual Monitors
- 3. Hardphones/Softphone
- 4. Scanner
- 5. Printer

NOTES			