TASK SHEET

Customer Care 1 (Retention Manager)

<u>Expectations</u>

Create an exceptional experience for our customers, your teammates, and leadership
All tasks completed daily
32 Point Day: 1 point for calls taken or walk-ins, 3 points for 4R/*Customer Conversation*
Code of Conduct

- On-time means logged in and ready to work beginning of day and after lunch
- No Cell Phones
- Follow all checklist and Compliance Guidelines
- Be Dependable: Do Not Exceed Allotted PTO
- If you do not know our systems: STUDY

Daily Schedule and Office Duties	
Time	**Description**
8:15am-8:25	Team Prioritization
8:25am-9am	Thank You Note, Clear List View 1 - Service Task, Policy Delivery, Appointment Prep, Text Confirmations, Clear Customer Care folder and SF Connect as a team
11am	Team Prioritization Check-In
Lunch	Assign time ____________
4pm	Team Prioritization Check-In
Office Duties	Assign ____________

Team	
Task	**Description**
*Customer Conversations/*4Rs	➢ Auto and Fire Renewals (one month prior to renewal) ➢ Assign: ______________________________
State-to-States	➢ Assign: ______________________________

Customer Retention Management	➢ Assign: ___________________________
Success Matrix	➢ No Voicemails ➢ 100% referral ask ➢ Present Life on all payments ➢ Appointment checklist/quote checklist ➢ Activities completed daily ➢ DSS on all quotes

Tools and Resources

<u>Procedures for all Customers</u>

Draw "C" in ECRM and NECHO

- Review NECHO for policy discrepancies/gaps in coverage/missing endorsements
- Present Life/DI/HI with ALL policy changes
- Update contact and preferences

If there is a bad phone number in ECRM, send pre-stamped postcard
Reply "Got it" to all emails from Agent and Team Members

Locate tasks: ECRM > TASKS> "Open Service Tasks" or ECRM > Cases > "Action Needed Cases"

OSOEZ Folders: in Outlook

SFConnect Usage: Hide and archive immediately after responding.

Email Usage: Copy/paste customer communications into ECRM Notes. Use texting templates for email content.

Note: New Business Documents and Cancellations within 12 months of business written goes back to TM that wrote the business.

Activities	
Task	***Description***
Monitor SFConnect Assign: ___________	➢ Handle customer communications and transactions ➢ Notify sales team of messages related to new business opportunities
Monitor Agent Email Assign: ___________	➢ Respond on behalf of Agent ➢ Move items to customer care / sales folders as appropriate ➢ Notify Agent of items of interest
Customer Cancellations / 4521s	➢ Review with team and report trends in activity to Agent
BOD	➢ Serve as backup to CCR2 for items below
ECRM Cases	➢ Review for claims BOD ➢ Call customer, Email claim template, Text Contact Card-Auto/Fire and New Claim Filed from SF Connect Templates ➢ Report to the team
Internet Change Requests for Fire	➢ Complete changes as requested ➢ Copy and paste into ECRM with actions taken or needed ➢ Text #1, schedule 4R if applicable
Internet Change Requests for Auto	➢ Complete changes as requested ➢ Copy and paste into ECRM with actions taken or needed ➢ Text #1, schedule 4R if applicable
Address Changes	➢ If HH has duplicate address, text #10 to verify correct address ➢ Complete renters re-write ➢ Complete address change in NECHO on all accounts as needed

Home Surveys (updated ERC)	➢ Text #3 ➢ Schedule *Customer Conversation* ➢ Run ERC tool ➢ Submit remarks and attach ERC via NECHO
Home Renewals (Repairs Needed)	➢ Text # 3 ➢ Submit requested info via NECHO
Commercial Audit Letter Workers Compensation Audit	➢ Text #4 ➢ Schedule *Customer Conversation*
Mortgagee Cancellation Notice/Mortgage Payoff	➢ If new business, Assign to TM that wrote ➢ If renewal, text #3, Call, Email
All Customer Cancellations	➢ Research and compile reasons and how many were cancelled vs saved, report daily ➢ Either create opportunity in ECRM-Stage: Closed, X-Date: is the day the policy cancelled, Marketing Source: Prior Customer, Relationship Type: Win back OR Pull monthly for cancelled auto and fire policies (Agent ECRM > Dashboard > Pre-filtered links > Retention and Service > Defectors > Scroll to graph > Click month to run > below drill down, click arrow > Share > Export to Excel). Contacts should be made 30 days prior to the anniversary date of cancellation. Next create opportunity in ECRM-Stage: Closed, X-Date: is the day the policy cancelled, Marketing Source: Prior Customer, Relationship Type: Win back

4521s	➢ Contact client to find out why they are wanting to transfer ➢ Schedule appointment to review policies/situations ➢ Emphasize that we want to continue to work with them and make the situation right (if applicable) ➢ If new update entire Households contact information, account note and schedule an appointment ➢ Report in daily meeting