TASK SHEET

Customer Care 2 w/out BOD Vendor

Expectations

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) ➢ Assigned to: ____________________
State-to-States	➢ Assigned to: ____________________

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"DISCIPLINE TAKES NO VACATION"

Customer Retention Manager	➢ CCR1
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" **Email Usage:** Copy/paste customer communications into ECRM Notes. Use texting templates for email content. **OSOEZ Folders:** in Outlook **SFConnect Usage:** Hide and archive immediately after responding. **Note:** New Business Documents and Cancellations within 12 months of business written goes back to TM that wrote the business.

Activities	
Task	***Description***
Monitor Customer Care Folder Assign: ___________	➢ Handle customer communications and transactions and document in ECRM

BOD	➢ Complete all items as outlined 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
Customer Cancellations due to Underwriting Memo / Additional Information Needed	➢ Utilize text template based on context of memo ➢ Call and text weekly until information received or cancellation occurs
All Customer Cancellations (Optional) Assign: _______________	➢ Research and compile reasons and how many were cancelled vs saved ➢ Create Opportunity in ECRM-Stage: Closed, X-Date: is the day the policy cancelled, Marketing Source: Prior Customer, Relationship Type: Win back ➢ Report in daily meeting
4521s (Optional) Assign: _______________	➢ 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

Documents Needed—Recurring Monthly Authorization Form	****IF NEW BUSINESS, ASSIGN TO TM THAT WROTE********IF CHANGE, ASSIGN TO TM THAT MADE CHANGE**** ➢ Text #5 ➢ Use SFPP hyperlink to send email ➢ If no texting preference, Call ➢ **Word Track**: "I wanted to let you know that the monthly authorization form required to draft your account each month has not been received. I just sent the form to your email. Please complete it at your earliest convenience. Thank you for choosing [Agent Name] State Farm!" ➢ Document in ECRM
Policy Documents Needed: Alarm Cert, Selection, Expired License, Mileage Request, etc.	➢ Home Alert-Text #16, Document ECRM ➢ Expired License-Text #18, Document ECRM
Home/Auto Discount Removed	➢ Research to see why discount was removed ➢ Document in ECRM ➢ If resolved, mark Complete ➢ Add back if needed
MLD Removed	➢ Research why discount was removed ➢ Document in ECRM ➢ Add back if needed ➢ Text #2 to schedule an appointment if necessary
Premium Increase of $10/month +	➢ Copy task into Account Note in ECRM, set Alert ("4R premium increase") ➢ Text #2

Negative Star Level Change	➢ Copy task into Account Note in ECRM, set Alert ("4R premium increase") ➢ Text #2
Premium Decrease of $10/month + Standard to Mutual Offer/ Positive Star Level Change	➢ Assign: _____________ ➢ Will Call Day 1, if NA, LM, Sent Text #20 ➢ Day 2, Call, if NA,LM, and Complete ➢ **Word Track:** "Mr. Customer, Please contact us about available discounts on your insurance at xxx-xxx-xxxx. Thank you for choosing [Agent Name] State Farm!
Persistency Alarm (Life) /Late Payment Offer (Life)/ Policy Lapse Notification ****NOT POLICIES ON SFPP****	➢ Persistency Alarm: pend to 3 days prior to lapse notification ➢ Lapse notification: Call/Text #7/Email ➢ Document ECRM
Life Reinstatement App Needed	➢ Assign: _____________
GIO	➢ Assign: _____________
Good Student Recertification	➢ Text #8
OSOEZ folders-New Business	➢ Copy and paste notice into ECRM task and assign to appropriate TM
Late Payment **Fire policy app date-30 days after cancellation** **Business policy app date—16 days after cancellation**	****If SFPP and no preferences set, create Account note with Alert ("Update texting/emailing preferences")**** ➢ First day: Pend out 3 days prior to cancellation. ➢ 3 days prior to cancellation: <u>**Check to see if payment has been made**</u> (NECHO, ECRM) ➢ Text #9 ➢ If no texting preference, call, leave message if no answer. Email. Then pend out 1 day prior to App date.

	➢ **Word track** if you get them on the phone: "We received a notice that State Farm has not received your premium yet so we were reaching out to help you take care of that today." ➢ **Word track** if no answer: "This is an urgent notice for xxxxxx, please call our office as soon as possible regarding your insurance at xxx-xxx-xxxx." ➢ 1 day prior to App date: **<u>Check to see if payment has been made</u>**. ➢ Same process. ➢ If policy has been written within the last 12 months reassign back to the producer
Mortgagee Warning	➢ Mark Complete
Life Late Pay Offer-Spanish Speaking Customer	➢ Assign _______________
Bank info/Credit Card info needed	➢ Text #13 ➢ Document ECRM
Fire Warning/Past Due Bills	➢ Mark Complete (Will work as late pay process when cancellation notice is sent)
Returned Mail	➢ Text #10 ➢ If no texting preference, email or call
PLUP/CLUP Renewal questionnaires	➢ Text #11 ➢ If no texting preference, email or call ➢ Copy and paste request in ECRM with notes
Vehicle Status Update	➢ Text #12 ➢ Document in ECRM
Earned Premium Notice	➢ Mark Complete
ERS Tow notification	➢ Mark Complete
E-signature Needed	➢ Assign to TM that wrote

E-signature Completed	➢ Mark Complete
Policies Issued higher-in office	➢ Assign to writing TM or TM that made change – make sure sales fixes it and email trends to leadership
Audit Premium Adjustments	➢ Text #4 ➢ Document ECRM
Underwriting Caution Memos	➢ Text #12 ➢ If option to send letter from SF, choose option to send from regional office ➢ If no texting preference, email or call ➢ Document ECRM with alert on account page ("See caution memo")
Open Service Tasks—After-hours	➢ Service Related (CCC requests, Internet change requests/quotes, customer needing call back, etc.)
Marketing Lists	➢ Assign to ________________
Open Sales Tasks—After-hours	➢ Assign to ________________
Email Address Needed	➢ Text #19 ➢ Document ECRM
BOD Policies Issued and Mailed	➢ Assign to TM that wrote original policy ➢ If renewal, complete
Vin Verification	➢ Text #21 ➢ Document ECRM
Total Loss Claim-Action Required	➢ Text #12 ➢ Document ECRM