

TASK SHEET

Contact Representative

Expectations

Create an exceptional experience for our customers, your teammates, and leadership

HOURLY Expectations: One to two quote transfers and forty outbound calls

Code of Conduct

- On-time means logged in and ready to work beginning of day and after lunch
- No Cell Phones for non-work purposes during working hours
- Follow all checklists and communication guidelines
- Be Dependable: Be on time and (if eligible) do not exceed allotted PTO

Tools and Resources

Locate List Views: ECRM > Opportunities

OSOEZ Folders: in Outlook

Activities

<i>Task</i>	<i>Description</i>
Outbound Calls	<ul style="list-style-type: none">• Complete Step One of the Five Step Customer experience on assigned lists• Use process to overcome objections and generate live quote transfers for account representatives.• When a lead is obtained park the call then "QUOTE ON [LINE NUMBER]!" (Account Representative will reply "GOT IT!")
Additional Duties	<ul style="list-style-type: none">• Assist with community events and other outside marketing as assigned• Complete any office duties (office cleaning or organization) as assigned



"DISCIPLINE TAKES NO VACATION"