

INCREASING EFFICIENCY

Goal

Reduce non-revenue generating calls and activities while proactively managing customer accounts.

Efficient Household

Customer contact information, preferences, and SF Mobile are set up and up-to-date. All households have current account notes detailing what has been completed, along with recommendations that were declined.

Reports

In Bound Calls
Abandoned/Voicemails
SF Mobile Usage

EXISTING HOUSEHOLDS

Account Review Process

Utilize a company approved vendor to schedule customer conversations. All auto and fire policies billed are contacted 30 days prior to renewal. Update account note utilizing our notation process.

Call-ins and Walk-ins

While I have you on the phone, let me take a look at your account and see if there is anything I need to bring to your attention. Always update current contact information, preferences and SF Mobile.

Account Activity Example

Added Car Info

Auto:

Added 2024 GMC 1500, increased G to 1000, declined R due to other vehicles available.

Fire:

Set ERC appt, added sewer back-up, recommended PAP on wife's ring-getting information via email.

Life:

Presented 450k to cover mortgage-declined.



TROPHY CLUB CONSULTING LLC
"DISCIPLINE TAKES NO VACATION"



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NEW HOUSEHOLDS

Complete onboarding checklist.

**New Household Info is the same format as existing household other than New Household Date and FORM.

SYSTEMS

SF CONNECT

Voicemail

Hey XXXX, sorry we missed your call. How may we assist you?

Thank you XXXX, SF.

Call Backs

Appointments

BOD

CHAT

ANSWERS

SF MOBILE

