

ELEVATE WORKSHEET



Customer Care Job Duties

Retention - 4Rs

Claims

Customer Care Folder

SF Connect

BOD

General Service

Reinstatements

ELEVATE WORKSHEET



Customer Care Job Duties

The 32 Point Day

9-10am	15 mins	15 mins	15 mins	15 mins
10-11am	15 mins	15 mins	15 mins	15 mins
11am-12pm	15 mins	15 mins	15 mins	15 mins
12-1pm	15 mins	15 mins	15 mins	15 mins
1-2pm	15 mins	15 mins	15 mins	15 mins
2-3pm	15 mins	15 mins	15 mins	15 mins
3-4pm	15 mins	15 mins	15 mins	15 mins
4-5pm	15 mins	15 mins	15 mins	15 mins

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Upcoming Classes

(All classes Eastern time)

- ❖ May 26-27: Evolve II Service
- ❖ May 27: Quick Hit - Email Efficiencies
- ❖ May 28: Elevate - Sales Team Job Duties
- ❖ June 3: Quick Hit - Understanding Short Term Disability Needs
- ❖ June 8-10: Evolve
- ❖ June 10: Quick Hit - Open Q&A
- ❖ June 11: Elevate - Outside Marketing

Trophy Club Links



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LEAVE US A
GOOGLE REVIEW

