

# TASK SHEET

## *Customer Care 1 (Retention Manager)*

### **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

<b>Daily Schedule and Office Duties</b>	
<b>Time</b>	<b>Description</b>
8:15 am - 8:25 am	Team Prioritization
8:25 am - 9 am	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
11 am	Team Prioritization Check-In
Lunch	Assign time _____
3 pm	Team Prioritization Check-In
Office Duties	Assign _____

<b>Team</b>	
<b>Task</b>	<b>Description</b>
<i>Customer Conversations/4Rs</i>	<ul style="list-style-type: none"> <li>➤ Auto and Fire Renewals (one month prior to renewal)</li> <li>➤ Assign: _____</li> </ul>

Voicemails	<ul style="list-style-type: none"> <li>➤ Immediately send service text #22</li> <li>➤ Assign: _____</li> </ul>
State-to-States	<ul style="list-style-type: none"> <li>➤ Assign: _____</li> </ul>
Customer Retention Management	<ul style="list-style-type: none"> <li>➤ Assign: _____</li> </ul>
Success Matrix	<ul style="list-style-type: none"> <li>➤ No Voicemails</li> <li>➤ 100% referral ask</li> <li>➤ Present Life on all payments</li> <li>➤ Appointment checklist/quote checklist</li> <li>➤ Activities completed daily</li> <li>➤ DSS on all quotes</li> </ul>

<b>Tools and Resources</b>
<p><b><u>Procedures for all Customers</u></b></p> <p>Draw "C" in ECRM and NECHO</p> <ul style="list-style-type: none"> <li>• Review NECHO for policy discrepancies/gaps in coverage/missing endorsements</li> <li>• Present Life/DI/HI with ALL policy changes</li> <li>• Update contact and preferences</li> </ul> <p>If there is a bad phone number in ECRM, send pre-stamped postcard Reply "Got it" to all emails from Agent and Team Members</p> <p><b>Locate tasks:</b> ECRM &gt; TASKS&gt; "Open Service Tasks" or ECRM &gt; Cases &gt; "Action Needed Cases"</p> <p><b>OSOEZ Folders:</b> in Outlook</p> <p><b>SFConnect Usage:</b> Hide and archive immediately after responding.</p> <p><b>Email Usage:</b> Copy/paste customer communications into ECRM Notes. Use texting templates for email content.</p> <p><b>Note:</b> New Business Documents and Cancellations within 12 months of business written goes back to TM that wrote the business.</p>

<b>Activities</b>	
<b>Task</b>	<b>Description</b>
Monitor SFConnect Assign: _____	<ul style="list-style-type: none"> <li>➤ Handle customer communications and transactions</li> <li>➤ Notify sales team of messages related to new business opportunities</li> </ul>
Monitor Agent Email Assign: _____	<ul style="list-style-type: none"> <li>➤ Respond on behalf of Agent</li> <li>➤ Move items to customer care / sales folders as appropriate</li> <li>➤ Notify Agent of items of interest</li> </ul>
Customer Cancellations / 4521s	<ul style="list-style-type: none"> <li>➤ Contact customer to schedule 4R via email, text, and all phone numbers</li> <li>➤ Emphasize that we want to continue to work with them and make the situation right (if applicable)</li> <li>➤ If new, update entire Households contact information, account note and schedule an appointment.</li> <li>➤ If unable to schedule, email Agent immediately with household name, reason for cancellation, new carrier info, and request dec pages.</li> <li>➤ Copy Agent email to ECRM to document</li> <li>➤ Follow Win-Back procedures to create opportunity</li> </ul>
BOD	<ul style="list-style-type: none"> <li>➤ Serve as backup to CCR2 for items below</li> </ul>
Appointment Setting Service	<ul style="list-style-type: none"> <li>➤ Appointments come into shared folder</li> <li>➤ Review appointment information, look up customer</li> <li>➤ If customer had a review or was written within two years, review account and determine if an appointment is necessary</li> <li>➤ If necessary, create follow up task "Scheduled (Phone/Virtual/Office) Appointment MM/DD/YYYY at X:XX AM/PM" due on date of appointment</li> </ul>

	<ul style="list-style-type: none"> <li>➤ For phone and virtual appointments, create GNC Meeting</li> <li>➤ Send Calendar Invite to Customer Email (do not assign appointment). Include GNC link in calendar invite</li> <li>➤ If appointment is not necessary, ensure household is in good order and make good faith call to offer cancellation of appointment</li> </ul>
ECRM Cases	<ul style="list-style-type: none"> <li>➤ Review for claims BOD</li> <li>➤ Call customer, Email claim template, Text Contact Card-Auto/Fire and New Claim Filed from SF Connect Templates</li> <li>➤ Report to the team</li> </ul>
Internet Change Requests for Fire	<ul style="list-style-type: none"> <li>➤ Complete changes as requested</li> <li>➤ Copy and paste into ECRM with actions taken or needed</li> <li>➤ Text #1, schedule 4R if applicable</li> </ul>
Internet Change Requests for Auto	<ul style="list-style-type: none"> <li>➤ Complete changes as requested</li> <li>➤ Copy and paste into ECRM with actions taken or needed</li> <li>➤ Text #1, schedule 4R if applicable</li> </ul>
Address Changes	<ul style="list-style-type: none"> <li>➤ If HH has duplicate address, text #10 to verify correct address</li> <li>➤ Complete renters re-write</li> <li>➤ Complete address change in NECHO on all accounts as needed</li> </ul>
Home Surveys (updated ERC)	<ul style="list-style-type: none"> <li>➤ Text #3</li> <li>➤ Schedule <i>Customer Conversation</i></li> <li>➤ Run ERC tool</li> <li>➤ Submit remarks and attach ERC via NECHO</li> </ul>
Home Renewals (Repairs Needed)	<ul style="list-style-type: none"> <li>➤ Text # 3</li> <li>➤ Submit requested info via NECHO</li> </ul>
Commercial Audit Letter	<ul style="list-style-type: none"> <li>➤ Text #4</li> <li>➤ Schedule <i>Customer Conversation</i></li> </ul>
Workers Compensation Audit	

<p>Mortgagee Cancellation Notice/Mortgage Payoff</p>	<ul style="list-style-type: none"> <li>➤ If new business, Assign to TM that wrote</li> <li>➤ If renewal, text #3, Call, Email</li> </ul>
<p>All Customer Cancellations</p>	<ul style="list-style-type: none"> <li>➤ Research and compile reasons and how many were cancelled vs saved, report daily</li> <li>➤ Schedule 4R to review to save the business</li> <li>➤ If customer cancels, collect declarations page or proof of new policy, and save in Batch File</li> <li>➤ Research and compile reasons and how many were cancelled vs saved, report to TM daily</li> <li>➤ Selena to create opportunity in ECRM-Stage: Not Now Follow Up, X-Date: day the policy cancelled, Marketing Source: Prior Customer, Relationship Type: Win back</li> <li>➤ Cancellation Handler to pull monthly for cancelled auto and fire policies (from AGENT's ECRM: Dashboard &gt; Pre-filtered links &gt; Retention and Service &gt; Defectors &gt; Scroll to graph &gt; Click month to run &gt; below drill down, click arrow &gt; Share &gt; Export to Excel). Contacts should be made 30 days prior to the anniversary date of cancellation.  Next create opportunity in ECRM-Stage: Not Now Follow Up, X- Date: the day the policy cancelled, Marketing Source: Prior Customer, Relationship Type: Win back</li> </ul>
<p>4521s</p>	<ul style="list-style-type: none"> <li>➤ Contact client to find out why they are wanting to transfer</li> <li>➤ Schedule appointment to review policies/situations</li> <li>➤ Emphasize that we want to continue to work with them and make the situation right (if applicable)</li> <li>➤ If new update entire Households contact information, account note and schedule an appointment</li> <li>➤ Report in daily meeting</li> </ul>

### Compensation and Incentives

Monthly Commission Production Requirements	Auto/Fire: 12 Life/Health: 4 Reviews: 2 PTO: Cannot exceed and must not exceed 75% before end of May Compliance: Cannot exceed 2 returned quotes, policies, or undelivered policies **See Handbook and Commission Schedule for details.
Salary Raise and Promotion Eligibility	Compliance, PTO, remain in good standing with office Code of Conduct, average minimum of 32-points per day, meet minimum production requirements 10 of 12 months

# TASK SHEET

## Customer Care 2

### 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
8:15 am - 8:25 am	Team Prioritization
8:25 am - 9 am	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
11 am	Team Prioritization Check-In
Lunch	Assign time _____
3 pm	Team Prioritization Check-In
Office Duties	Assign _____

Team	
Task	Description
<i>Customer Conversations/ 4Rs</i>	<ul style="list-style-type: none"> <li>➤ Auto and Fire Renewals (one month prior to renewal)</li> <li>➤ Assigned to: _____</li> </ul>
Vocemails	<ul style="list-style-type: none"> <li>➤ Immediately send service text #22</li> <li>➤ Assign: _____</li> </ul>

State-to-States	➤ Assigned to: _____
Customer Retention Manager	➤ CCR1
Success Matrix	<ul style="list-style-type: none"> <li>➤ No Voicemails</li> <li>➤ 100% Referral Ask</li> <li>➤ Present Life on All Payments</li> <li>➤ Appointment checklist/Quote Checklist</li> <li>➤ Activities completed daily</li> <li>➤ DSS on all quotes</li> </ul>

### Tools and Resources

**Procedures for all Customers**

- 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

<i>Task</i>	<i>Description</i>
Monitor Customer Care Folder Assign: _____	<ul style="list-style-type: none"> <li>➤ Handle customer communications and transactions and document in ECRM</li> </ul>

BOD	<ul style="list-style-type: none"> <li>➤ Complete all items as outlined below</li> </ul>
ECRM Cases	<ul style="list-style-type: none"> <li>➤ Review for claims BOD</li> <li>➤ Call customer, Email claim template, Text Contact Card-Auto/Fire and New Claim Filed from SF Connect Templates</li> <li>➤ Report to the team Ω</li> </ul>
Internet Change Requests for Fire	<ul style="list-style-type: none"> <li>➤ Complete changes as requested</li> <li>➤ Copy and paste into ECRM with actions taken or needed</li> <li>➤ Text #1, schedule 4R if applicable</li> </ul>
Internet Change Requests for Auto	<ul style="list-style-type: none"> <li>➤ Complete changes as requested</li> <li>➤ Copy and paste into ECRM with actions taken or needed</li> <li>➤ Text #1, schedule 4R if applicable</li> </ul>
Address Changes	<ul style="list-style-type: none"> <li>➤ If HH has duplicate address, text #10 to verify correct address</li> <li>➤ Complete renters re-write</li> <li>➤ Complete address change in NECHO on all accounts as needed</li> </ul>
Home Surveys (updated ERC)	<ul style="list-style-type: none"> <li>➤ Text #3</li> <li>➤ Schedule <i>Customer Conversation</i></li> <li>➤ Run ERC tool</li> <li>➤ Submit remarks and attach ERC via NECHO</li> </ul>
Home Renewals (Repairs Needed)	<ul style="list-style-type: none"> <li>➤ Text # 3</li> <li>➤ Submit requested info via NECHO</li> </ul>
Commercial Audit Letter  Workers Compensation Audit	<ul style="list-style-type: none"> <li>➤ Text #4</li> <li>➤ Schedule <i>Customer Conversation</i></li> </ul>
Mortgagee Cancellation Notice/  Mortgage Payoff	<ul style="list-style-type: none"> <li>➤ If new business, Assign to TM that wrote</li> <li>➤ If renewal, text #3, Call, Email</li> </ul>

<p>Customer Cancellations due to Underwriting Memo / Additional Information Needed</p>	<ul style="list-style-type: none"> <li>➤ Utilize text template based on context of memo</li> <li>➤ Call and text weekly until information received or cancellation occurs</li> </ul>
<p>All Customer Cancellations (Optional) Assign: -----</p>	<ul style="list-style-type: none"> <li>➤ Research and compile reasons and how many were cancelled vs saved</li> <li>➤ Create Opportunity in ECRM-Stage: Not Now Follow Up, X-Date: is the day the policy cancelled, Marketing Source: Prior Customer, Relationship Type: Win back</li> <li>➤ Report in daily meeting</li> </ul>
<p>4521s (Optional) Assign: -----</p>	<ul style="list-style-type: none"> <li>➤ Contact client to find out why they are wanting to transfer</li> <li>➤ Schedule appointment to review policies/situations</li> <li>➤ Emphasize that we want to continue to work with them and make the situation right (if applicable)</li> <li>➤ If new update entire Households contact information, account note and schedule an appointment</li> <li>➤ Report in daily meeting</li> </ul>

<p>Documents Needed— Recurring Monthly Authorization Form</p>	<p><b>**IF NEW BUSINESS, ASSIGN TO TM THAT WROTE**</b> <b>**IF CHANGE, ASSIGN TO TM THAT MADE CHANGE**</b></p> <ul style="list-style-type: none"> <li>➤ Text #5</li> <li>➤ Use SFPP hyperlink to send email</li> <li>➤ If no texting preference, Call</li> <li>➤ <b>Word Track:</b> "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!"</li> <li>➤ Document in ECRM</li> </ul>
<p>Policy Documents Needed:  Alarm Cert, Selection, Expired License, Mileage Request, etc.</p>	<ul style="list-style-type: none"> <li>➤ Home Alert-Text #16, Document ECRM</li> <li>➤ Expired License-Text #18, Document ECRM</li> </ul>
<p>Home/Auto Discount Removed</p>	<ul style="list-style-type: none"> <li>➤ Research to see why discount was removed</li> <li>➤ Document in ECRM</li> <li>➤ If resolved, mark Complete</li> <li>➤ Add back if needed</li> </ul>
<p>MLD Removed</p>	<ul style="list-style-type: none"> <li>➤ Research why discount was removed</li> <li>➤ Document in ECRM</li> <li>➤ Add back if needed</li> <li>➤ Text #2 to schedule an appointment if necessary</li> </ul>
<p>Premium Increase of \$10/month +</p>	<ul style="list-style-type: none"> <li>➤ Copy task into Account Note in ECRM, set Alert ("4R premium increase")</li> <li>➤ Text #2</li> </ul>

Negative Star Level Change	<ul style="list-style-type: none"> <li>➤ Copy task into Account Note in ECRM, set Alert ("4R premium increase")</li> <li>➤ Text #2</li> </ul>
Premium Decrease of \$10/month + Standard to Mutual Offer/ Positive Star Level Change	<ul style="list-style-type: none"> <li>➤ Assign: _____</li> <li>➤ Will Call Day 1, if NA, LM, Sent Text #20</li> <li>➤ Day 2, Call, if NA, LM, and Complete</li> <li>➤ <b>Word Track:</b> "Mr. Customer, please contact us about available discounts on your insurance at xxx-xxx-xxxx. Thank you for choosing [Agent Name] State Farm!"</li> </ul>
Persistency Alarm (Life) /Late Payment Offer (Life)/ Policy Lapse Notification <b>**NOT POLICIES ON SFPP**</b>	<ul style="list-style-type: none"> <li>➤ Persistency Alarm: pend to 3 days prior to lapse notification</li> <li>➤ Lapse notification: Call/Text #7/Email</li> <li>➤ Document ECRM</li> </ul>

Life Reinstatement App Needed	<ul style="list-style-type: none"> <li>➤ Assign: _____</li> </ul>
GIO	<ul style="list-style-type: none"> <li>➤ Assign: _____</li> </ul>
Good Student Recertification	<ul style="list-style-type: none"> <li>➤ Text #8</li> </ul>
OSOEZ folders-New Business	<ul style="list-style-type: none"> <li>➤ Copy and paste notice into ECRM task and assign to appropriate TM</li> </ul>
Late Payment  **Fire policy app date-30 days after cancellation**  **Business policy app date—16 days after cancellation**	<p><b>**If SFPP and no preferences set, create Account note with Alert ("Update texting/emailing preferences")**</b></p> <ul style="list-style-type: none"> <li>➤ First day: Pend out 3 days prior to cancellation.</li> <li>➤ 3 days prior to cancellation: <b><u>Check to see if payment has been made</u></b> (NECHO, ECRM)</li> <li>➤ Text #9</li> <li>➤ If no texting preference, call, leave message if no answer. Email. Then pend out 1 day prior to App date.</li> </ul>

	<ul style="list-style-type: none"> <li>➤ <b>Word track</b> 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."</li> <li>➤ <b>Word track</b> 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."</li> <li>➤ 1 day prior to App date: <b><u>Check to see if payment has been made.</u></b></li> <li>➤ Same process.</li> <li>➤ If policy has been written within the last 12 months reassign back to the producer</li> </ul>
Mortgagee Warning	<ul style="list-style-type: none"> <li>➤ Mark Complete</li> </ul>
Life Late Pay Offer-Spanish Speaking Customer	<ul style="list-style-type: none"> <li>➤ Assign _____</li> </ul>
Bank info/Credit Card info needed	<ul style="list-style-type: none"> <li>➤ Text #13</li> <li>➤ Document ECRM</li> </ul>
Fire Warning/Past Due Bills	<ul style="list-style-type: none"> <li>➤ Mark Complete (Will work as late pay process when cancellation notice is sent)</li> </ul>
Returned Mail	<ul style="list-style-type: none"> <li>➤ Text #10</li> <li>➤ If no texting preference, email or call</li> </ul>
PLUP/CLUP Renewal questionnaires	<ul style="list-style-type: none"> <li>➤ Text #11</li> <li>➤ If no texting preference, email or call</li> <li>➤ Copy and paste request in ECRM with notes</li> </ul>
Vehicle Status Update	<ul style="list-style-type: none"> <li>➤ Text #12</li> <li>➤ Document in ECRM</li> </ul>
Earned Premium Notice	<ul style="list-style-type: none"> <li>➤ Mark Complete</li> </ul>
ERS Tow notification	<ul style="list-style-type: none"> <li>➤ Mark Complete</li> </ul>
E-signature Needed	<ul style="list-style-type: none"> <li>➤ Assign to TM that wrote</li> </ul>

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

**Compensation and Incentives**

Monthly Commission Production Requirements	Auto/Fire: 12 Life/Health: 4 Reviews: 2 PTO: Cannot Exceed and must not exceed 75% before end of May Compliance: Cannot Exceed 2 returned quotes, policies, or undelivered policies **See Handbook and Commission Schedule for details.
Salary Raise and Promotion Eligibility	Compliance, PTO, remain in good standing with office Code of Conduct, average minimum of 32-points per day, meet minimum production requirements 10 of 12 months