TASK SHEET

Account Representative

Expectations

Create an exceptional experience for our customers, your teammates, and leadership
All task completed daily
Five Submitted Policies OR six Household Quotes (HOURLY Expectation: one household quote OR one appointment OR forty outbound calls)
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-8:45am	Reviewing Quotes and Households or Training
8:45am-9am	Team Prioritization
9am-10am	Power Hour
10:15am-11am	Thank You Note, Clear List View 1 - Service Task, Policy Delivery, Appointment Prep and text confirmations
3pm-4pm (Optional)	Power Hour
Lunch	Assign time ____________
Office Duties	Assign ____________

Team	
Task	**Description**
*Customer Conversations/*4Rs	Auto and Fire Renewals (one month prior to renewal) Financial Services customer appointments scheduled in advance Assign: ________________

State to States	Assign: ________________
Sales Matrix	No Voicemails 100% Referral Ask Present Life on All Payments Quote Checklist on all quotes Complete ECRM and office tasks 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 “Open Service Tasks” **OSOEZ Folders:** in Outlook **SFConnect Usage:** Hide and archive immediately after responding. **Email Usage:** Copy/paste customer communications into ECRM Notes. Use texting templates for email content. **Note:** New Business Documents and Cancellations within 12 months of business written goes back to TM that wrote the business.

Activities	
Task	***Description***
Appointments to Close	Ensure all onboarding items are completed on Quote Checklist

	Present in-person or through Good Neighbor Connect whenever possible Send Sales Text #2 and calendar invite with reminder Subject: [Agent Name] State Farm, Location: Address, Details: Add any notes on what they need to bring Send Text #1 to confirm day of appointment
All Leads (Applies to all activities below)	Present in-person or through Good Neighbor Connect when possible Send Sales Text #3 prior to calling Send Sales Text #1 for all call backs with a calendar invite with reminder Subject: [Agent Name] State Farm-Savings, Location, Call Details: Add any notes that would incentivize them to close Create a follow-up using our systems
Direct Connects	Request credit when filters are not met, send sales text #1 for all call backs and send a calendar invite with reminder
List View 2* – Sales Tasks	Set a specific time to present to these customers with text reminder
New Internet Leads	Text Sales Text #3 immediately call twice within one minute, if lead not reached call again before EOD Request Credit when filters are not met
List View 3*	Request Credit when filters are not met Text Sales Text #3, call morning and afternoon

Marketing	See Team Marketing Document. Everyone is a potential customer or employee. Utilize our material responsibly and have it with you at all times.
In-Book Marketing	Assigned by Month. Campaign Calls Weekly. Call 2x, LM, Send text #2. If contact is made and quote is being

	provided, create opportunity from campaign list. If customer declines review, remove from the campaign list and note the interaction. “Mr. Smith we were reviewing your account and wanted to bring a discount to your attention.” Revert to FORM. VM: “This is ____ from _______. Please give me a call regarding your accounts at your earliest convenience. Thank you.”

Appointment Setting Service	Appointments come into shared email folder
	
	Review appointment information, look up customer
	➢ If customer had a review or was written within two years, review account and determine if an appointment is necessary
	➢ If necessary, create follow up task “CF Scheduled (Phone/Virtual/Office) Appointment MM/DD/YYYY at X:XX AM/PM” due on date of appointment
	    ☐ For phone and virtual appointments, create GNC Meeting
	    ☐ Send Calendar Invite to Customer Email (do not assign appointment). Include GNC link in calendar invite
	➢ If appointment is not necessary, ensure household is in good order and make good faith call to offer cancellation of appointment