ELEVATE WORKSHEET

Assignable Duties

SALES/MARKETING
Prioritization
Customer Conversation
State-to-State Transfers
GIOs
Premium Decrease ($10+)
IPS Sales
In-Book Marketing Lists
Microsite Updates
Review Responses
Community Marketing
Social Media Content Creation
Social Media DMs
Daily Check-Ins

SERVICE
Prioritization
BOD
Customer Care Folder - Lead
Customer Care Folder - Backup
SF Connect - Lead
SF Connect - Backup
Customer Conversation
Life Reinstatement App Needed
IPS Service
In-Book Marketing Lists
4R Appointments
Retention Management
Voicemails
Customer Cancellations - Win Backs
Daily Check-Ins

OFFICE/HR
Apppointment Setting Service Handling
Reports
Team Member Onboarding
Equipment Maintenance ond Ordering
Birthdays and Anniversaries
Agent Email Management - Primary
Agent Email Management - Backup
Payroll
Bills
Accounting
HR

Notes:

ELEVATE
WORKSHEET

Office Daily Schedule

8:00AM - 8:15AM: Team Leader Huddle
8:15AM - 8:25AM: Customer Care Team Prioritization
8:15AM - 8:45AM: Account Representative Admin Time
8:45AM - 9:00AM: Account Representative Team Prioritization
9:00AM - 9:45AM: Account Representative Training Time
10:00AM - 11:00AM: Power Hour
11:00AM: Customer Care Team Prioritization Check-In
Lunch: Assign Time
2:00PM - 3:00PM: Power Hour
3:00PM: Customer Care Team Prioritization Check-In
4:00PM: Account Representative Check-In

Notes:

ELEVATE WORKSHEET

Upcoming Classes

(All classes Eastern Standard time)

- November 16-17 - Evolve II Service (12:00PM-2:00PM)
- November 18 - Quick Hit (10:30AM-10:45AM)
  (The Thank You That Isn't Small Talk)
- November 19 - Elevate (1:00PM-1:30PM)
  (Utilizing ECRM to Write More Business)
- November 30-December 2 - Evolve (1:00PM-4:00PM)
- December 2 - Quick Hit (10:30AM-10:45AM)
  (Fall Life Challenge Wrap-Up)
- December 3 - Elevate (1:00PM-1:30PM)
  (2027 Team Member Handbook - AGENTS ONLY)

Trophy Club Links

FOLLOW US ON FACEBOOK

FOLLOW US ON LINKEDIN

FOLLOW US ON INSTAGRAM

LEAVE US A GOOGLE REVIEW