9.5 Call Rotation

Date: [Enter Date Created or Edited]

Person Responsible: Advisor: All 'A' Clients AND Client Service Manager: All 'B' Clients.

Frequency: All 'A' Clients: every 90 days AND All 'B' Clients: every 180 days

Process:

1. This is not a service call to generate business. Carefully review the Client History and Client Profile before making the call.
2. Make the call to the client at their preferred contact number and during a time of day when they are generally available.
3. Conduct the call with the client using the Call Rotation Script.
    a. Leave a message if you get voicemail using the Call Rotation Message Script.
4. Log any notes and additional Client Profiling information once the call is completed.
    a. These notes will be invaluable for future interactions with this client.
5. Make any other changes to the client's information on the CRM if required.
6. Know the next Call Rotation will pop up for this client automatically because it has been pre-scheduled into the CRM. The timing of this next call will depend on the client's classification:
    a. All 'A' Clients: every 90 days
    b. All 'B' Clients: every 180 days
7. If a Moment of Truth or serious issue arises set a high priority Next Action for the following day for the Client Service Manager on the CRM.

Scripting: Call Rotation Message Script and/or Call Rotation Script

Resources:

All scripts in this process are found on the shared drive in the "Exceptional Client Experience" folder, in the sub-folder called "Call Rotation".

Client Profiles are found on the shared drive in the "CLIENT MASTER" folder, in the sub-folder with the Clients Last Name *OR* on the "Client Profile" tab of the CRM.

💻 Use your CRM to fully automate as much of this process as possible.
→ Use live links for instant access to intranet/internet sources for online manuals and procedures.