Reviewing Boxes

The big thing here is honoring presidence and consistency. We want to stay consistent with the expectation, response quality, and logic flow.

If you make a change to a logic flow let me know so we can . The previous boxes need to be updated and then the logic change needs to be documented, then on Friday we need to go over the logic change in the team meeting.

Rachel may want to add to this (?) but this is the proceedure that I have been doing in general but especially as it pertains to the boxes.

I think of reviewing boxes in 3 main chunks.

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1. Customer Satisfactions

Customer Satisfaction is the most important aspect. Start by reading the email(s) and all the notes.

- [ ] Has client's question was answered sufficiently.

- [ ] Is there more we could do next time or any other actions we should take based off of this interaction?

- [ ] Do they have a task that needs to be completed that they have not yet completed?

If someone needs to respond you can first chat them to see if it is on their radar. Otherwise put the box back to Inprogress, tag them in it, and specify what might be missing.

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2. Format

Format is important for consistency and for the data analysis. When it gets put into an excel format the titles gets separated based off of the "||". It then gets compared to the information in the boxes; especially the brief description. Cross check the information in the custom columns to the title. That is the benefit of having the point of contact and the property name documented twice, begin able to verify.

When you look at the title and contacts you are looking to see if it is formatted correctly. You will also pay special attention to the brief description after going through the tags.

- [ ] Does the heading have 3 sections (4 for a call) separated by "||"?

- [ ] Is the information in the correct order?

- [ ] Did they get all of the information required? (As appropriate)

- [ ] Did the create, update, and/or select the appropriate contact?

- [ ] If there are multiple properties is there a double comma between each entry in the cell?

If there is an email. . .

- [ ] Did they change the brief description away from the subject line of the email?

- [ ] If there is an email is there any other contact information that can be extracted from it?

If someone gets the formation wrong *consistently* (I usually do more than 3 of the same mistake) then message them and tell them that the boxes which are in the status Review need to have their whatever fixed.

If they are making a **variety of mistakes** and most boxes have a mistake that are different, just send them a message them and ask if they want to go through anything. Be sure to let them the types of mistakes they were making, give them links to references, and keep in mind. . . they're probably just busy and need a loving reminder.

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3. Box / Data Input

The Box and Data Input is important for the stats. To check the different custom columns it is important that you use the flow chart and preferred Actions list. There are a lot of examples in the flow chart. If you run across a unique situation please make me aware and make sure to document it somewhere.

At this point most situations should be documented.

- [ ] Did they pick the appropriate Support Type per the flow chart?
- [ ] Pick the appropriate Action for the context? Is there a better choice?
- [ ] Do the other boxes appropriately fit the phone call? Would there need to be a different Equipment and/or Feature created or edited to fit this situation?
- [ ] Does the brief description provide any other information that would be desired?

If someone gets the tags incorrectly write a note with what needs to be fixed. Do not tell them exactly how to fix it, rather leave a link to where they can find this documenatation and a breif description as to where it can be found. Clarify if they need to put it back into review or if they can resolve after fixing.Change the Box Status to "Notes/Update".