Subject:	Product:	Approved on:
Request Queue Follow-up	Customer Loyalty Group	

Purpose:
Ensuring that agent *Processor Queues* are being checked every day and requests are being completed within a reasonable timeframe.

Policy:
- Requests are to be completed as quickly as possible.
    - Every effort should be made by the agent to immediately obtain all necessary signed documents while on live contact (call/chat) with the client, especially for the following:
        - Amendments for *Program Changes*
        - SPAAs for *Info – Changes*
    - If unable to complete a request immediately due to waiting for an action to be completed by the client:
        - Agent is to reach out to the client daily until request can be marked *Completed* or *Withdraw*
- Agents are to review their *Processor Queue* every day during their assigned *Request Time,* and during slow periods throughout the day.

Procedure:
1. From the *COA Processor Dashboard*, click on the *Processor Queue* button
2. The *Processor Queue* displays four columns that CLG utilizes:
    a. *Request Untouched*
    b. *Request Pending*
    c. *No Request Status*
    d. *Report FollowUp*
3. Scroll through the *Processor Queue* list until you see your name
4. Agents should be checking their *Untouched*, *Pending* and *No Request Status* requests everyday
    a. *Untouched* request requires an action that needs to be done by yourself
    b. *Pending request* requires actions to be done from a different department, agent or the client
    c. *No Request Status* requires the agent to open the request and select a status
5. Client should be reached out to every day for 5-business days and then again at least twice during the next 5-business days
    a. 10-business day timer resets when successfully able to reach client
6. Agent should be leaving notes each time the client is being contacted
    a. E.g. *"OBC regarding unsigned documents. LVM and sent email"*
7. If unable to reach, then request can be withdrawn
    a. Notes should be added when withdrawing a request
8. To check your scheduled follow ups, click *FollowUp*
    a. *FollowUp* list all scheduled calls that you have created through QuickBase with clients
    b. Agent should leave notes on the Client Page of any scheduled follow up call

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8/9/2018		Ta'lor Soden

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COA Users > **Processor Queue**
▸ Reports & Charts

71 Sales Agents   CLGUser is '7' OR ...

Name	Request Untouch	Request Pending	No Request Status	Report FollowUp	Team Leader	Team
Talor Soden	0	10	0 FollowUp			

Exceptions:
- If client can sign documents while on the call, the request should be *Pending* or *Completed* the same day and should not appear in agent's *Untouched* queue.
- *Global Validation* requests should **never** be withdrawn
- Agent's should be following up with each client everyday unless:
    - Client requests to be contacted only on certain day(s)
    - Client requests to be contacted only during a certain time of the day, and that time has already passed

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