

## Customer Service Basics :

Hello, How Are You, Please , Thank You , Sorry - are your words that help make clients feel more respected and to make it an easier experience for them. So always use them .

Smile, Be Nice and respectful always, Sir, Madam. Mr. or Mrs. Smith

Ask them if they have questions.

Always thank them for their business and for supporting our office.

Always ask for google review if they are happy with your service or have feedback, they can email

All renewals should be explained by phone or in person for Home, Business and Auto and others.

## Front Desk Management Procedure :

Make sure there is always one CSR available at the front desk. Schedule your lunch accordingly that one person is always there to take phone calls & to attend walk-in clients.

If the available Front Desk associate is occupied with phone call or with a client, next person in the schedule will take over and handle walk-ins.

Maintain a clean, organized and professional frond desk area.

Make sure promotional material (pens, chocolates etc) are stocked up

Check if we have mailed out the daily mails? If not send delivery guy to mail out

Before mailing out, make sure all envelopes are sealed, stamped and have return address stickers.

Send the supply requirement request to Prema/Raghav on 1st and 15th of every month.

Make sure the courier received from insurance company are opened and documents are handed over the respective CSR on the same day, do not leave the documents in your drawer/on your desk

Make sure your name plate and business cards are visible and accessible.

Greet visitors with a friendly smile and a welcoming tone – STAND UP and say “hello how can I help you ?” Once you have heard the inquiry ask them to take a seat, then you should sit. Speak clearly and loud enough for them to hear. Don’t sound quiet and shy.

If they are here to meet a staff member then Ask visitors name or company name, purpose of visit, name of the CSR they would like to meet. Ask them to be seated in an appropriate seat and let them know that you are informing the CSR and they should be here shortly. Call and Inform CSR with name or company name.

Always offer a drink if they are waiting. “Thanks for your patience they will be with you shortly.”

If possible, use the visitors name during the interaction.

Front desk staff should be able to handle phone calls, greet visitors and manage administrative tasks simultaneously.

Do not use earphone during your shift except lunch time due to ICBC Privacy Policy  
Assessment

Staff are assessed on the following criteria:

You can rate 1/10 on each point or highlight areas of improvement

Customer Service

Answering the phones and Front desk greeting

Cross Selling Other products

Adding new Client leads

Explaining to coverage to clients

Teamwork

good professional communication with team members

assisting each other

Client review or feedback

Getting Reviews online or google

Your feedback, contributions, and Suggestions

Accountability / Professionalism

Attendance / Availability

Follow Up with any pending duties/ Calling people back, passing on instructions.

Take responsibility to help client or colleague.

Responding to emails from clients, staff or management.

Following and learning new procedures.

Writing proper courteous emails, with Correct Subject

Training Progress / Study & Education